

XL Assist+ 1.4.2

Installation Guide

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PLMXLASSISTPLUS-XAVORCORPORATION

Installation Guide



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Contents

Overview	4
1. Installation Tasks Overview	4
2. Package Contents	4
Pre-Requisites.....	5
1. Application Server Requirement	5
2. Java Requirement	5
3. Agile Cookie Domain Configuration	5
4. Agile PLM Admin Account	5
Installation.....	6
1. Copy package Contents	7
2. Deploy AssistPlus Application on the Agile Application Server.....	9
2.1 Deploying AssistPlus on WebLogic Application Server (WLS)	9
2.2 Deploying AssistPlus on Oracle Application Server (OAS).....	17
3. Deploy JS component.....	18
4. AssistPlus- Admin Console (One-time Configuration).....	19
5. Configure Agile Web Proxy (Optional)	27
6. Verify Installation	28
Environment Variable setting for OAS	29
AssistPlus Master/Slave Architecture	31

Overview

This section provides an overview of tasks to be performed for XL Assist Installation and Setup in a Windows Server.

Section

1

1. Installation Tasks Overview

The installation process for PLM XL Assist+ has following sequence of steps. These will be subsequently described in detail in the following sections:

- Check system pre-requisites
- Create Environment Variable (Windows)
- Deploy the XL Assist+ war file to the Agile application server.
- Initial Assist+ configuration for admin access to Agile PLM
- Copy a single .js file to Agile
- Agile Web Proxy Server configuration (optional)
- Test that the application works

2. Package Contents

File AssistPlusPackage.zip extracted should contain:

#	Content	Type	Description
1.	InstallationGuide.pdf	FILE	Installation Document (this file)
2.	AdminConsole-UserManual.pdf	FILE	User Manual for AssistPlus Admin Console
3.	Content\	FOLDER	Application deployment and resource files
4.	JS\	FOLDER	Version specific JavaScript files
5.	WAR\	FOLDER	Version specific Application WAR files

Pre-Requisites

This section lists the System Requirements and Pre-requisite steps and checks for XL Assist + Installation.

Section

2

1. Application Server Requirement

XL AssistPlus Application will be installed on the same application server as Agile

You will need to access the WebLogic or OAS Application Server Admin Console.

2. Java Requirement

[JRE 1.5 or above](#) must be pre-installed on the server.


3. Agile Cookie Domain Configuration

XL AssistPlus uses Agile PLM session cookies. Therefore, the cookie domain for Agile instance needs to be configured correctly.

 Agile PLM's cookie domain setting can be found in Agile's configuration file: **agile.properties** under the key **cookie.domain**.

4. Agile PLM Admin Account

XL AssistPlus requires an Administrator account to access Agile. This account is used by the application to get metadata of Agile objects and to talk to Agile Server.

 The Agile account for Assist+ requires the built-in privilege: "Administrator". No other privileges are necessary for working Assist+.


Installation

Section

3

This section provides steps to install configure and verify XL AssistPlus Installation. The high level steps include:

- 1 Setup Package Contents
- 2 Deployment WAR on Application Server
- 3 First-time Configuration
- 4 Deploy JS component
- 5 Configure Agile Web Proxy (Optional)
- 6 Verification



 Pre-Requisites mentioned in Section 2 of this document must be checked The before proceeding with installation.

 Paths stated in the documentation use Windows style notation. Unix paths will work.

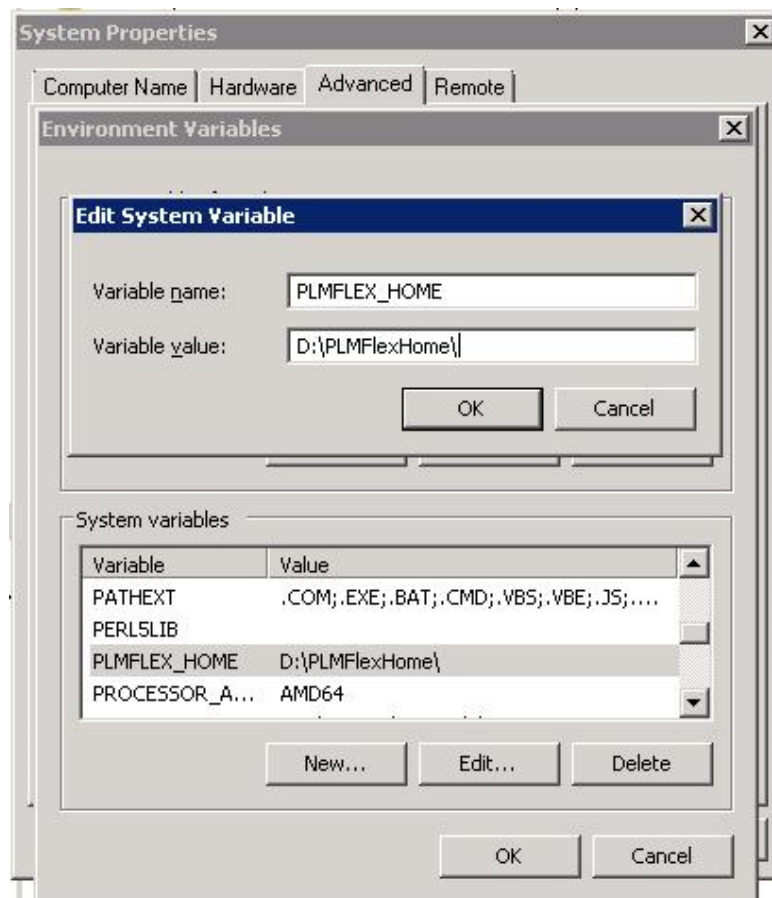
1. Copy package Contents



If the Agile Application Server components are hosted on a Windows-based machine, follow the below steps for setting up package contents:

1. Unpack **AssistPlusPackage.zip** to any file system location for use during installation.
2. Create a folder named PLMFLEXHome at manageable file system location (e.g. D:\PLMFLEXHOMEHome\)

-
-  The PLMFLEXHome folder will be used by the application and the contents must not be vulnerable to unauthorized modification.
 -  AssistPlus application must have privileges to read and write to this folder location.
-

3. Create an environment variable named PLMFLEX_HOME and provide path of the PLMFLEX Home directory (from step 1) as value.



-
-  Application Server service may need to be restarted in order to gain access to new environment variable.
 -  When deploying on OAS, the environment variable needs to be created in OAS EM. For specific instructions please refer to Appendix A of this document.
-

4. Copy the contents of **Content** folder (i.e. the AssistPlus folder) to PLMFLEXHome folder (created in step 1 above).

2. Deploy AssistPlus Application on the Agile Application Server

Below are the steps specific to the Application Server being used for Agile PLM application:

-
- ✎ The steps mentioned below are for a simple deployment. The process may vary for Application Server or Domain Administrators with environment specific requirements.
-

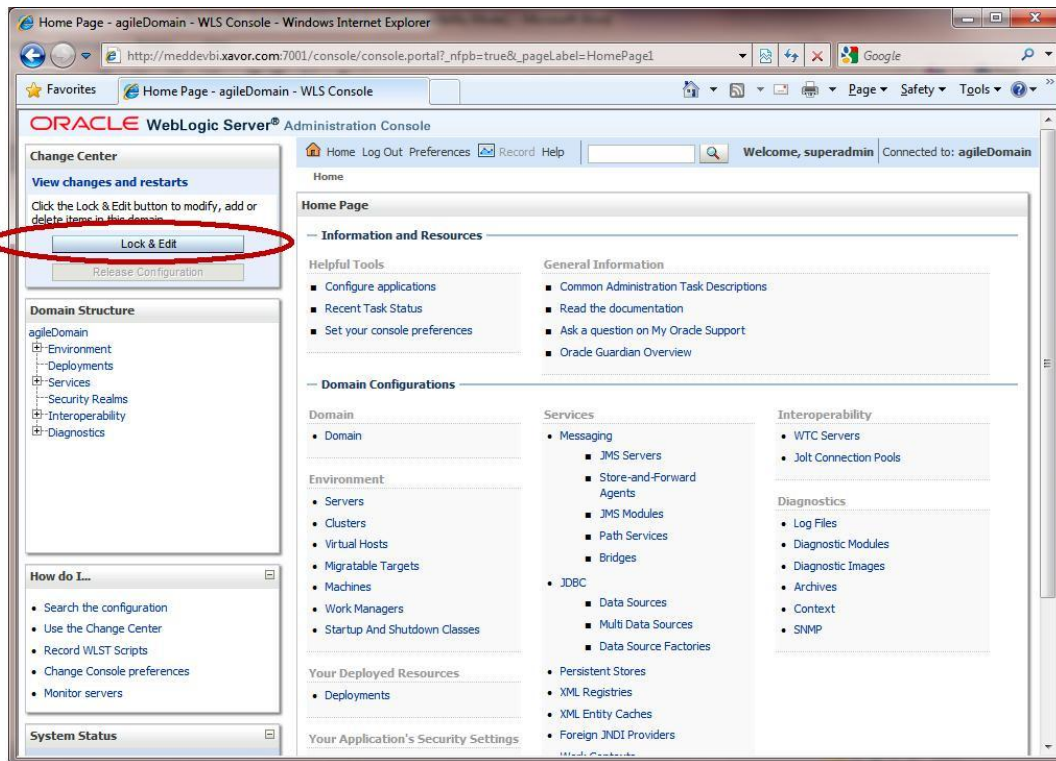
2.1 Deploying AssistPlus on WebLogic Application Server (WLS)

Below are the steps to deploy AssistPlus Application on WebLogic Server

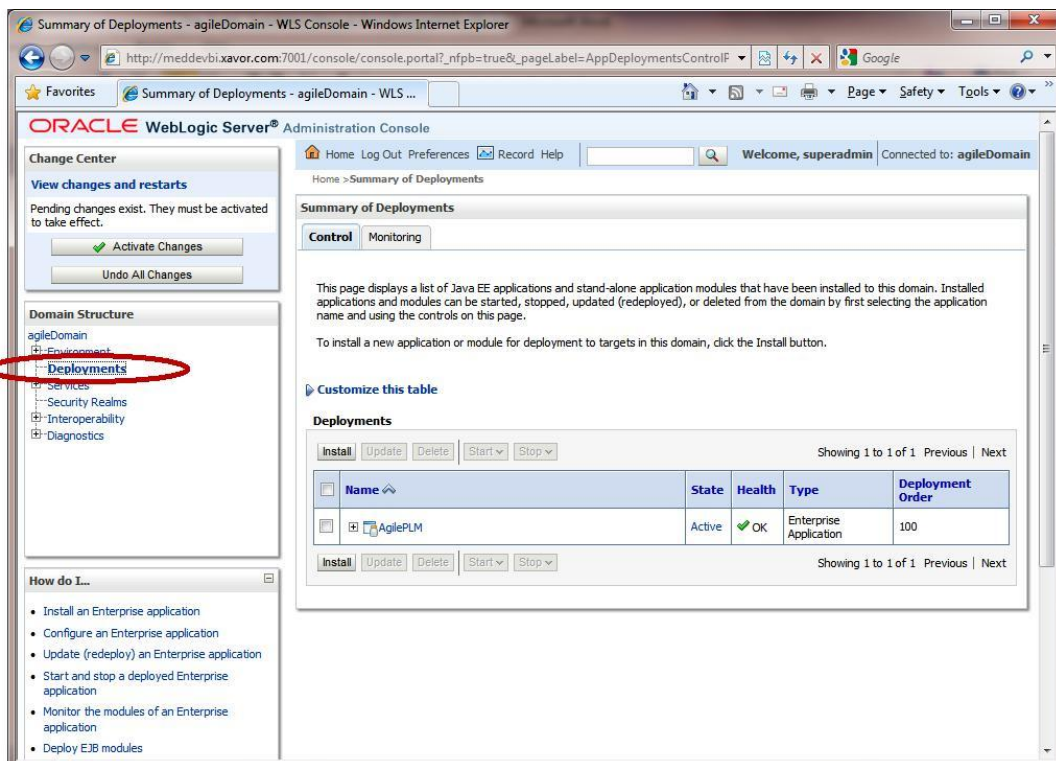
2.1.1 Open WebLogic Admin Console for agileDomain and login as superadmin:



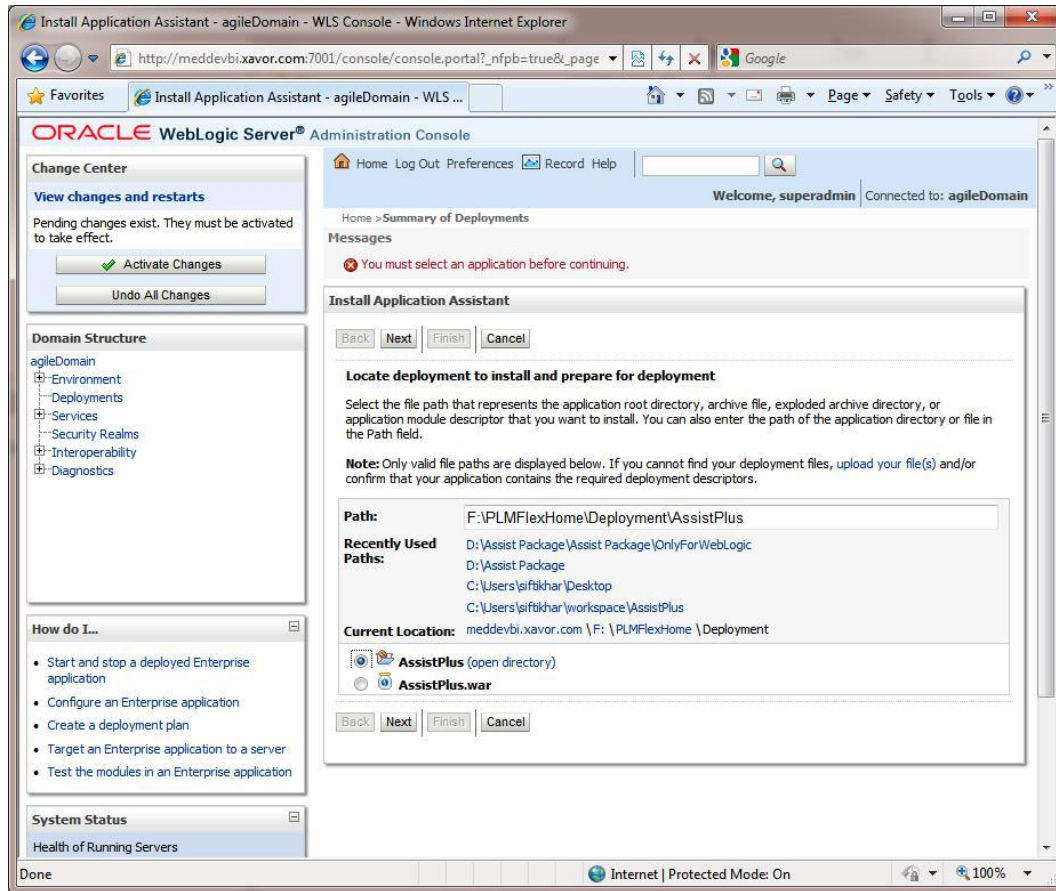
2.1.2 In the top left “Change Center” box, click “Lock & Edit”



2.1.3 From the “Domain Structure” box in the left-pane, click on “Deployments”.

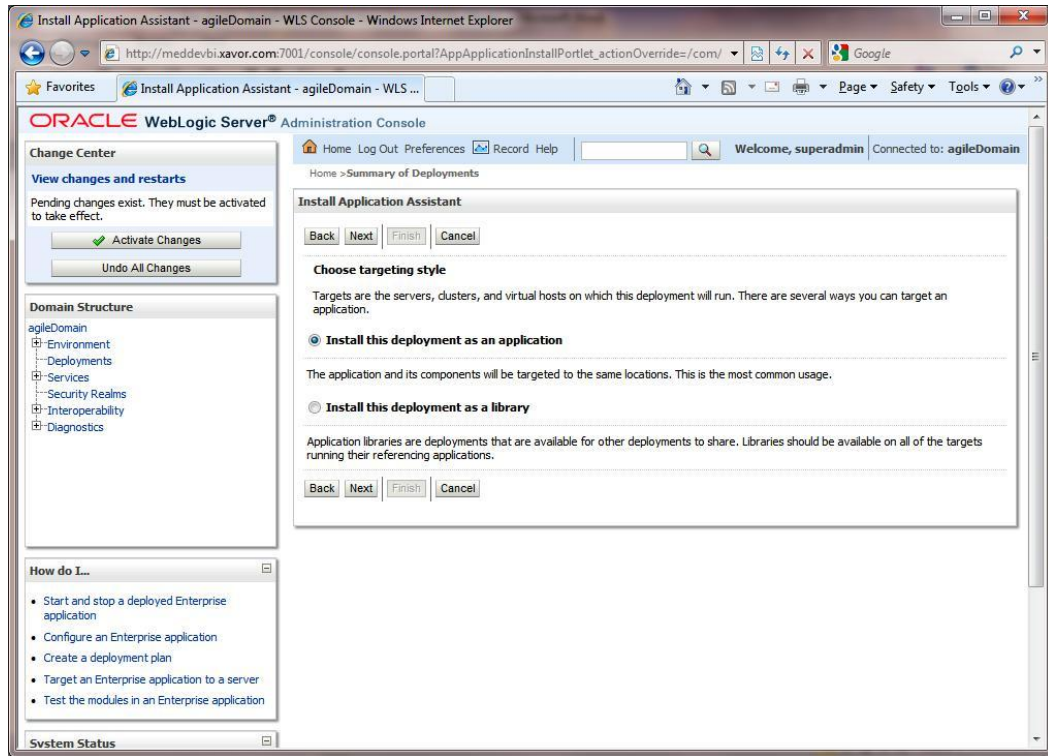


- 2.1.4 From the Deployments table, click on the Install button

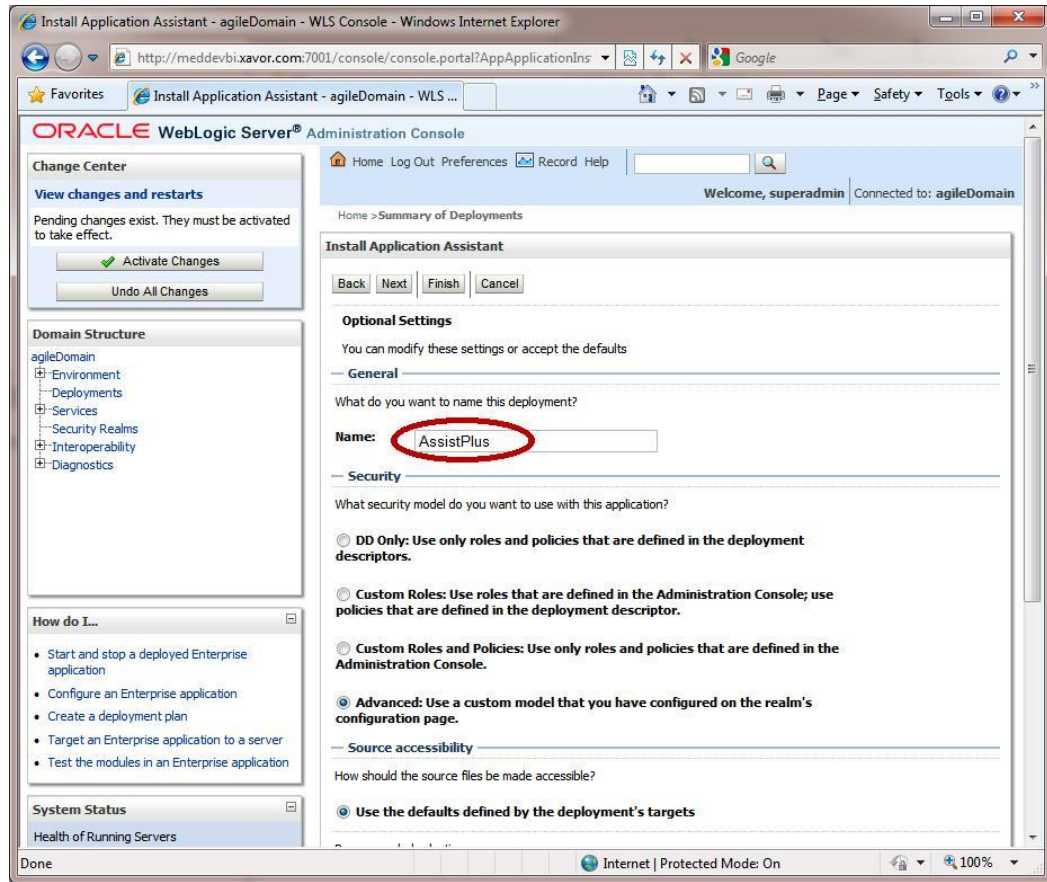


- 2.1.5 In the Path text box, enter the path where version specific WAR file is placed. e.g. for Agile 9.3.1, give the path of file <AssistPlusPackage>\WAR\9.3.1\

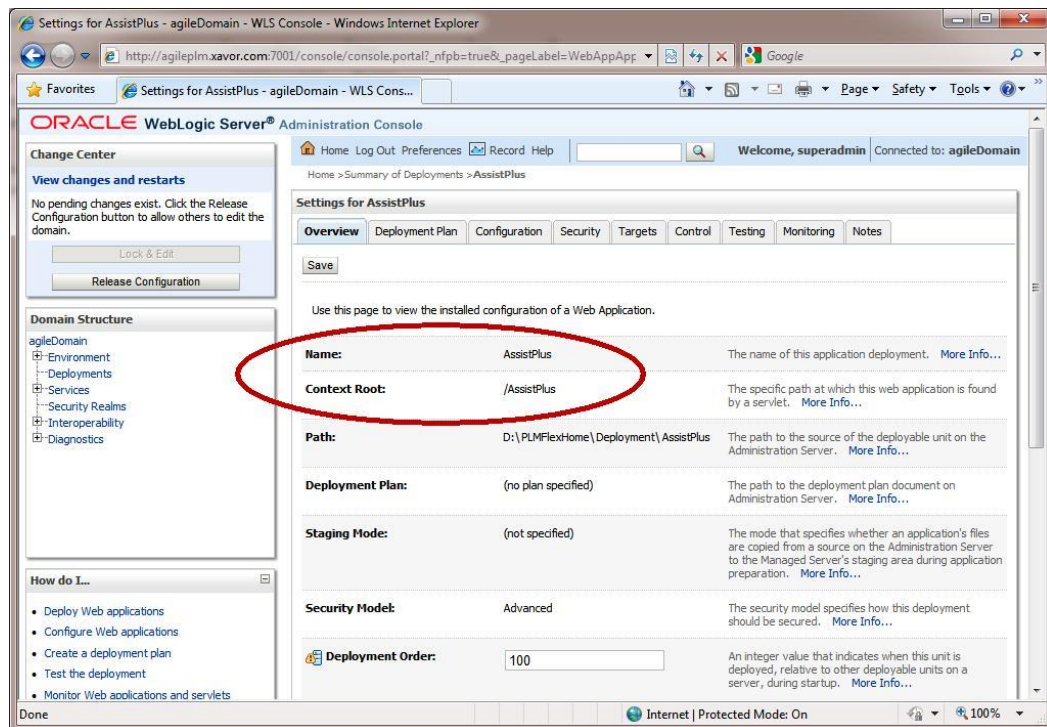
2.1.6 Select the AssistPlus.war file radio button and click Next.



2.1.7 Click Next



- 2.1.8 Verify that the deployment Name is AssistPlus and click on Next and then Finish.



- 2.1.9 Verify that the Name and Context Root is AssistPlus.

- 2.1.10 Click on Activate Changes button in the Change Center box on the left.

2.1.11 Click on Deployments in Domain Structure box on the left.

The screenshot shows the Oracle WebLogic Server Administration Console. On the left, the 'Domain Structure' box is expanded, and 'Deployments' is selected under the 'agileDomain' tree. The main content area is titled 'Summary of Deployments' and shows a table of installed applications. The 'AssistPlus' application is selected, and a context menu is open over the 'Start' button, showing options: 'Servicing all requests' and 'Servicing only administration requests'.

Domain Structure

- agileDomain
 - Environment
 - Deployments**
 - Services
 - Security Realms
 - Interoperability
 - Diagnostics

Summary of Deployments

This page displays a list of Java EE applications and stand-alone application modules that have been installed to this domain. Installed applications and modules can be started, stopped, updated (redeployed), or deleted from the domain by first selecting the application name and using the controls on this page.

To install a new application or module for deployment to targets in this domain, click the Install button.

Customize this table

Deployments

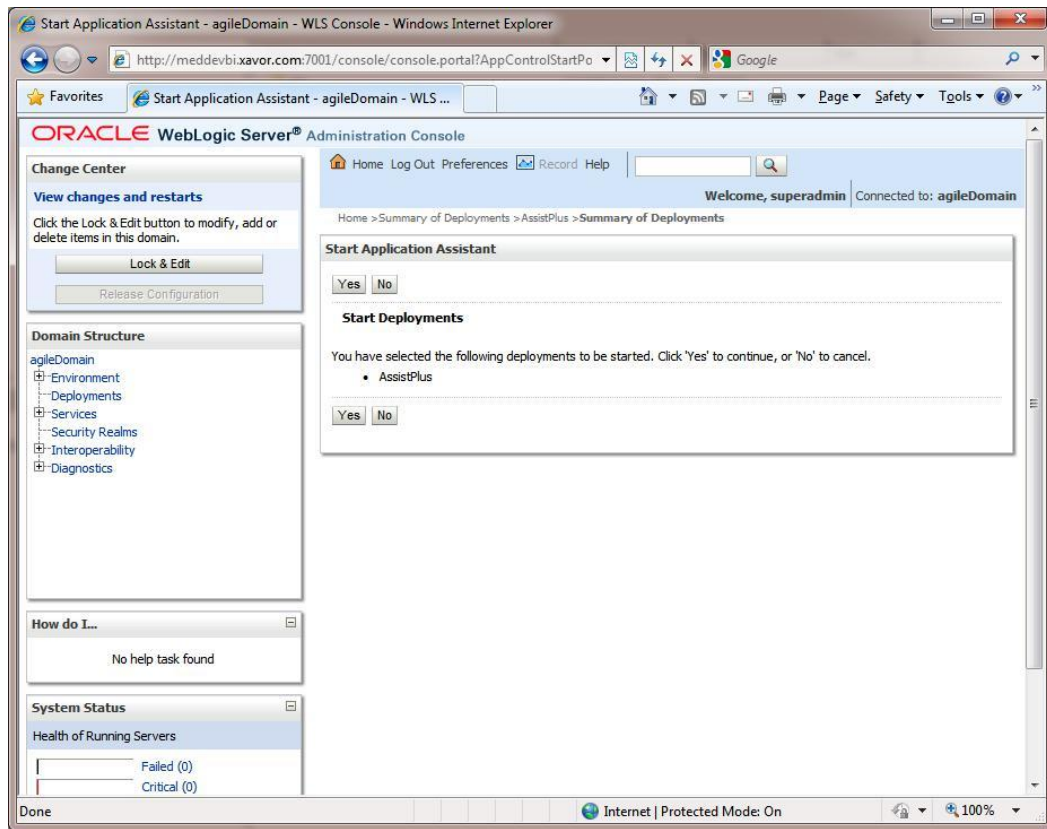
Name	State	Health	Type	Deployment Order
AgilePLM	Active	OK	Enterprise Application	100
AssistPlus	Installed	OK	Web Application	100

Showing 1 to 2 of 2 Previous | Next

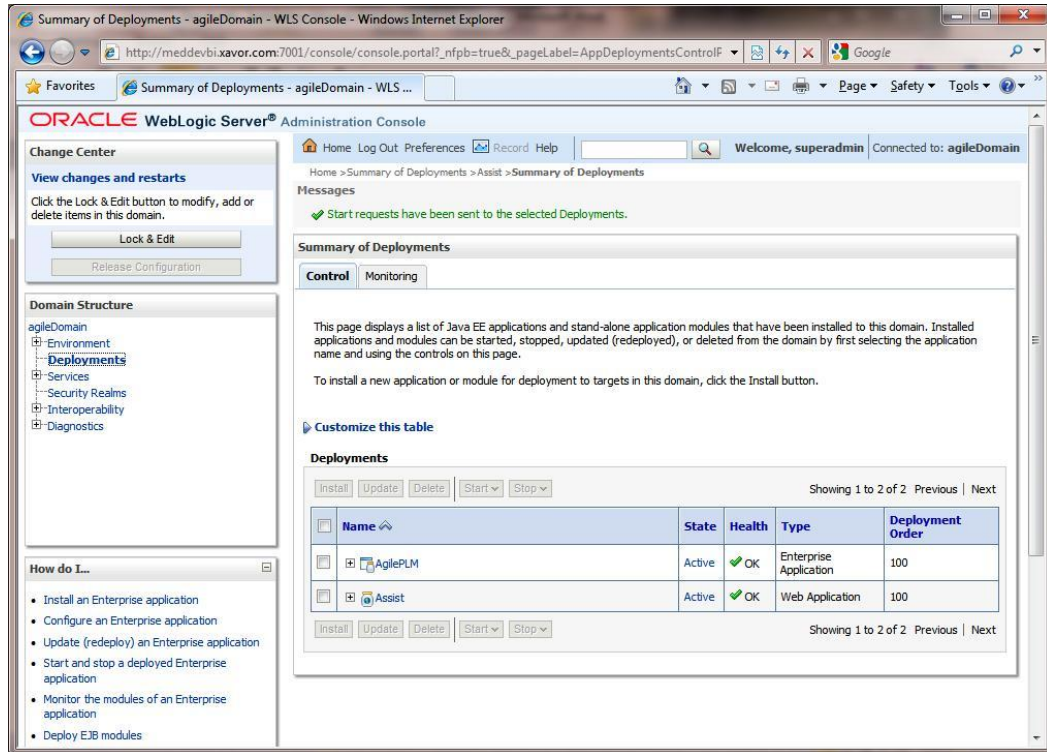
Buttons: Install, Update, Delete, Start, Stop

Context menu options: Servicing all requests, Servicing only administration requests

2.1.12 Select the AssistPlus Web Application in the Deployments table and click on the Start > Servicing All Requests.



2.1.13 Click Yes on Confirmation screen.



2.1.14 Verify that the AssistPlus application State is Active.

2.1.15 Logout of the Admin Console and proceed with Step 3, for further configuration of AssistPlus.

2.2 Deploying AssistPlus on Oracle Application Server (OAS)

Use the <PLMFLEXHOME>\AssistPlus.war file to deploy into the OAS server. Log in as admin into the OAS console and use similar deployment steps as described in WebLogic.

3. Deploy JS component

AssistPlus Package contains a version specific JS file

core-agile-min.js

This file needs to be deployed with the existing Agile PLM application.

Steps to follow:

1. Log on to the Agile server machine; go to the folder where Agile Application Server components are installed.
2. Search the **core-agile-min.js** file deployed as part of Agile PLM application. The path of this file is specific to the Application Server (OAS or WLS) that hosts Agile.

For OAS: Search for the file in <OAS_HOME> directory e.g.
D:\OASHome\j2ee\home\applications\Agile

For WLS: Search for the file in <AgileDomainServer> directory e.g.
D:\Agile\Agile931\agileDomain\servers\PLMFLEX-AgileServer

3. Take a backup of the existing **core-agile-min.js** file and replace it with the version specific JS file from the AssistPlus Package folder: **<AssistPlus Package>\JS\<AgileVersion>\core-agile-min.js** folder.

E.g. for Agile 9.3.1 copy file: D:\AgileFLEXExtension\AssistPlus Package\JS\9.3.1\core-agile-min.js

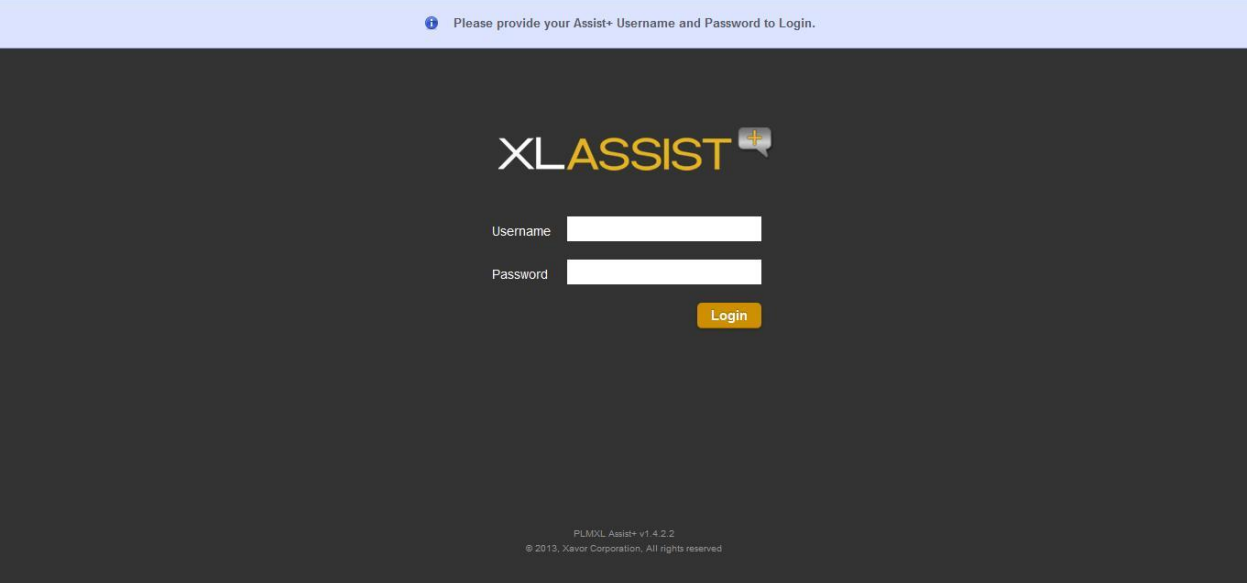
4. AssistPlus- Admin Console (One-time Configuration)

Once the **AssistPlus** application is successfully deployed on the corresponding Application Server, perform the below steps for a one-time configuration:

1. **NOTE:** A separate **PLMFLEXAssistPlus.lic** file will be shared that activates software usage. This file should be copied to the **\$PLMFLEX_HOME/AssistPlus** folder. Editing this file will make your license data invalid.
2. Invoke AssistPlus URL as follows:

<http://<AgilePLMServer>:<port>/AssistPlus> e.g.

<http://plmxl.xavor.com:7001/AssistPlus>



Please provide your Assist+ Username and Password to Login.

XLASSIST

Username


Password

Login

PLMXL Assist+ v1.4.2.2
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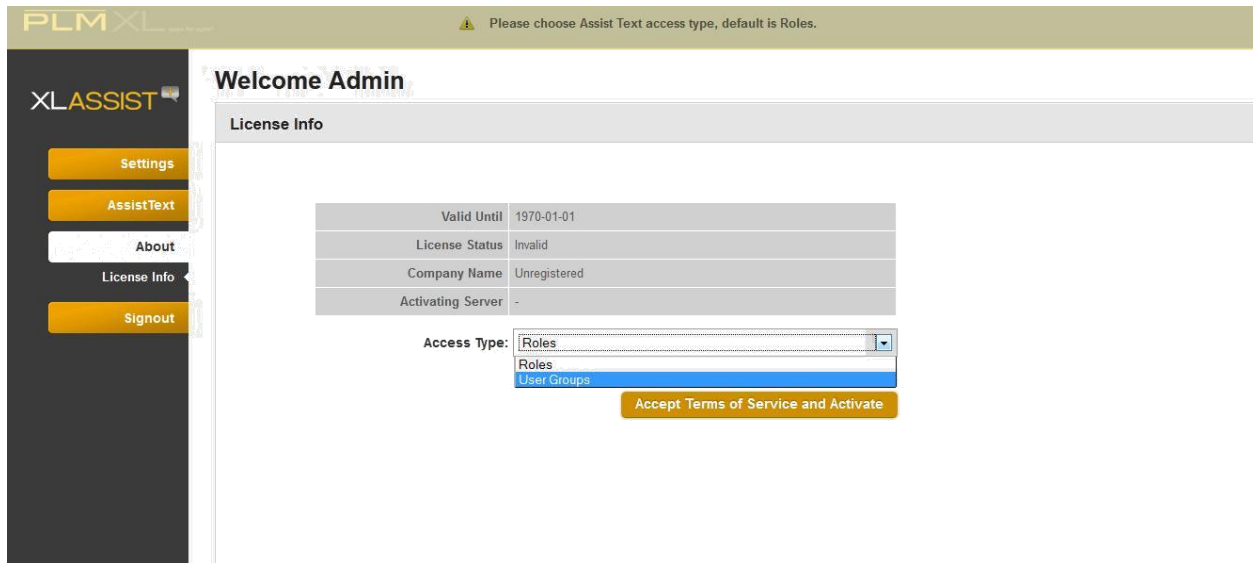
Use the following default admin credentials to login.

User Name: admin
Password: plmflex

 Note: This is the only default admin user for AssistPlus admin console. Password can

be changed once logged in.

3. The AssistPlus License Agreement page should display. Review terms of service and accept. This should set up the license agreement policies and activate the software.



License Info, provide the following information one time.

- **Access Type:** User is able to select as User Groups/Roles from drop down menu. This is one time configuration and cannot be changed later.
- **Accept Terms of Service and Activate:** Press the button to activate license, the notification bar below shows a success message.

-
- ✎ If the PLMFlexAssistPlus.lic is not in the \$PLMFLEX_HOME\AssistPlus folder, this step will fail
 - ✎ Unless the activation step is done, further configuration/usage of admin console will be not being possible.
-


3. In the Settings tab, 3 sections are displayed:

- a. Configurations
- b. Role /user Group Priorities
- c. Change Password

The screenshot shows the PLM XL ASSIST Admin interface. On the left is a sidebar with a 'Settings' menu highlighted in red, containing 'Configuration', 'Role Priority', and 'Change Password'. Below the menu are buttons for 'AssistText', 'About', and 'Signout'. The main content area is titled 'Welcome Admin' and 'Configuration'. It contains four configuration fields: 'Agile User Name' (text input with 'admin'), 'Agile Password' (password input with '*****'), 'Agile Server URL' (text input with 'http://plmflexdev.xavor.com:7001/Agile'), and 'AssistPlus Node Type' (dropdown menu with 'Slave' selected). Below the dropdown is the 'AssistPlus Master Node URL' field, which is currently empty. A 'Save Configuration' button is located at the bottom right of the configuration area.

Configuration section, enter the following information one time.

- **User Name:** An Agile user with Administration rights.
- **Password:** The password
- **Agile Server URL:** This is the target agile instance URL that application will work with. Give the URL as: <http://<AgilePLMServer>.<Domain>/Agile>
- **AssistPlus Node Type:** User is able to select as Master/Slave option from drop down menu.
Select Master to keep the current AssistPlus instance to serve as Master node.
Select Slave to provide another AssistPlus instance URL as Master Node
- **AssistPlus Master Node URL:** Displayed when Slave is selected as AssistPlus Node type option. User is able to provide another AssistPlus instance URL to serve as the Master node.

 For details on the Master/Slave Configuration options, please refer to **Appendix B: Assist+ Master/Slave Configuration**.

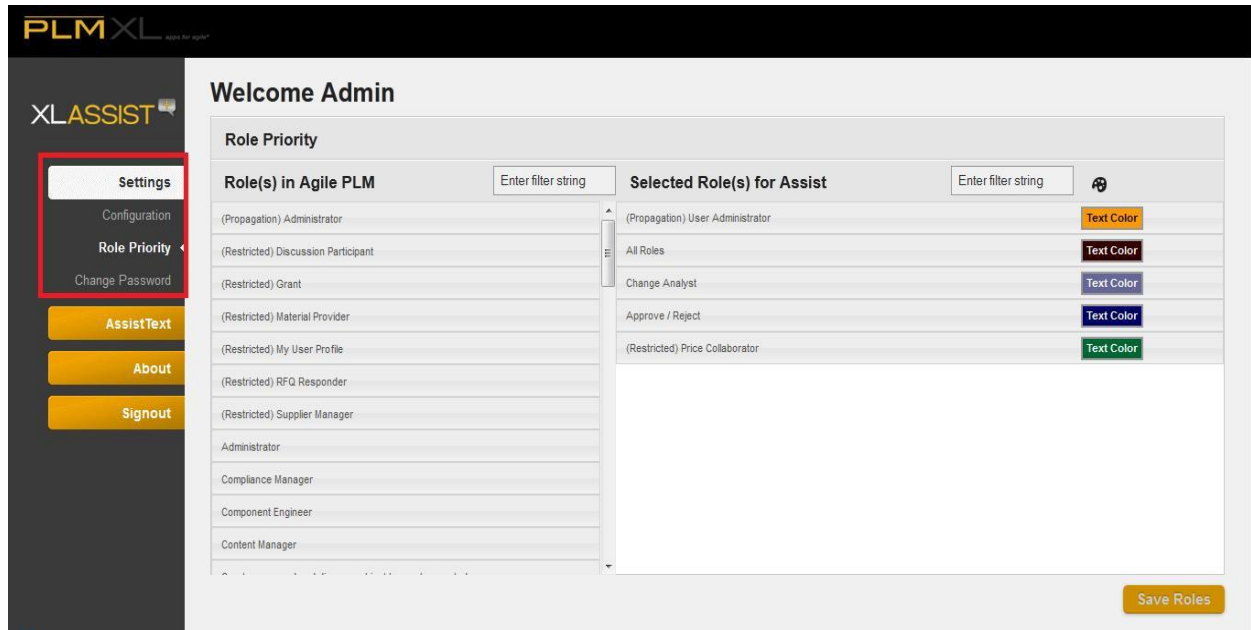
Change Password Section

- **User Name:** An Agile PLM user with Administration rights.
- **Current Password:** Administrator user current password
- **New Password:** Administrator user new password
- **Confirm New Password:** Administrator user new password to confirm
- Click the “change password” icon to save. The notification bar below shows success message if password changed successfully.

The screenshot shows the Agile PLM XLASSIST web interface. At the top, a dark banner displays the PLM XL logo and a status message: "Please wait while we are changing Password". Below this, the main content area is titled "Welcome Admin" and "Change Password". On the left, a vertical sidebar contains navigation links: "Settings" (highlighted with a red box), "Configuration", "User Group Priority", "Change Password" (with a left arrow), "AssistText", "About", and "Signout". The main content area contains three password input fields labeled "Current Password:", "New Password:", and "Confirm Password:", each followed by a masked input field (seven dots). A yellow "Change Password" button is positioned to the right of the "Confirm Password" field.

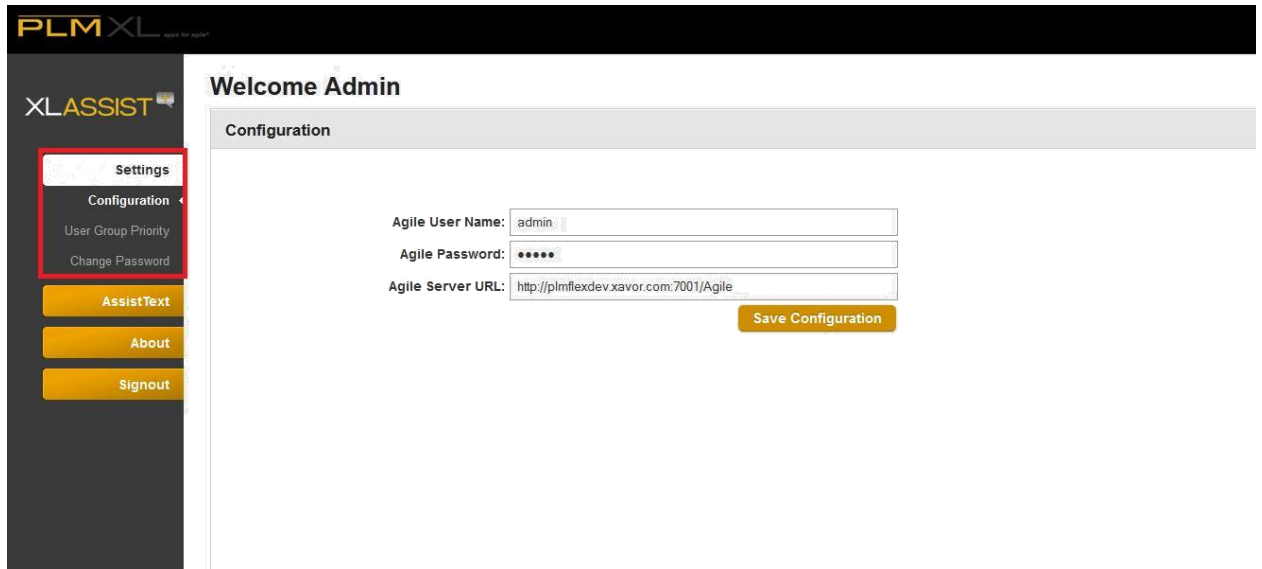
Role Preference Section allows admin create a set of allowable roles and the prioritize the message in case user is assigned to multiple roles

- User is able to filter the roles based on keyword.
- User drags roles from Agile PLM column to Selected Roles for Assist column. Roles placement is done with respect to its priority
- Click the “Save” icon to save the configurations.



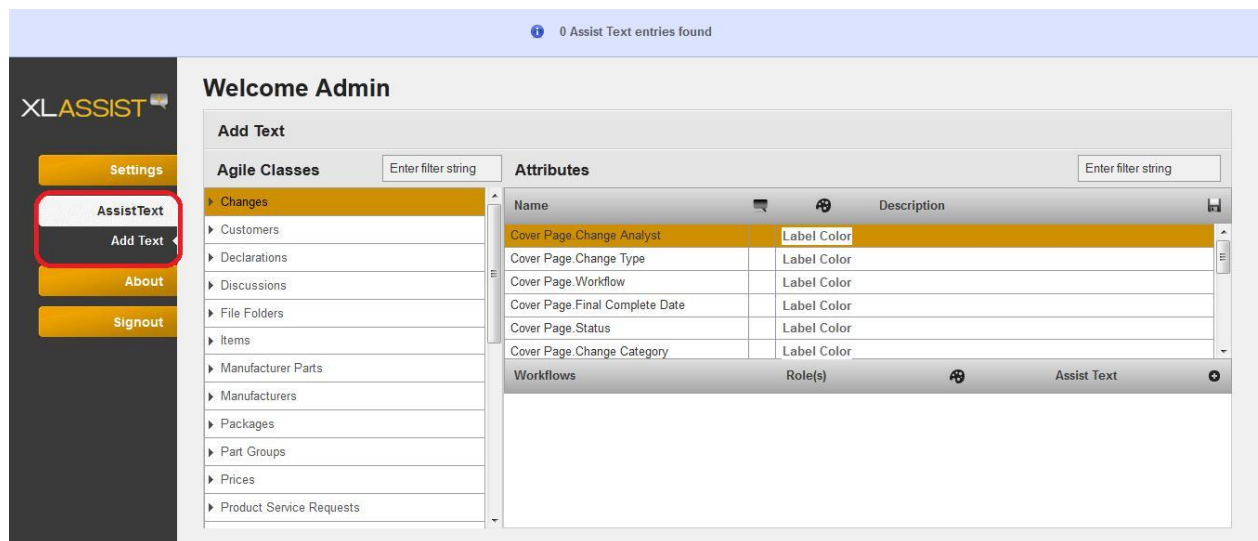
User Group Preference Section allows admin create a set of allowable user groups and the prioritize the message in case user is assigned to multiple user groups


- User is able to filter the user groups based on keyword.
- User drags user groups from Agile PLM column to Selected Roles for Assist column. user groups placement is done with respect to its priority
- Click the “Save” icon to save the configurations.




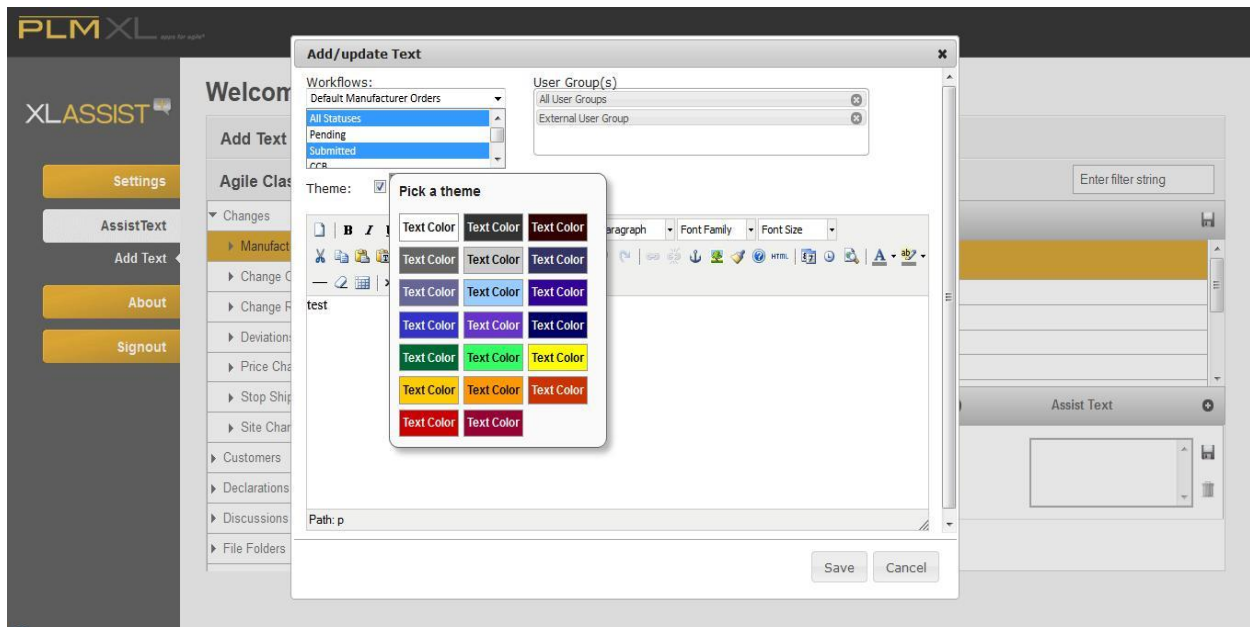
5. The Assist Text tab allows for setting messages

- Use the Agile Classes tree to select a base-class, class, or sub-class to view their respective pages 1, 2 and 3 attributes
- Click on the attribute to view or enter help text
- Edit roles/user groups to target the help text message. Use “All Roles” or “All groups” for access by everyone
- Optionally select text color
- Optionally change label color





- Click the  icon to create a new help text.

- Double click to edit an existing help text
- The  icon against the attributes signifies that a help text entry already against it.
- The edit screen is a rich text editor that can be switched to a pure HTML editor is needed, with editing for roles.



5. Configure Agile Web Proxy (Optional)

-  This step is required only if Agile Web Proxy is configured and used for accessing Agile PLM.
 -  Below steps are for IIS as web server and WebLogic Server as Application Server for Agile. Similar steps will be required for other servers
-

Follow the following steps for configuring Agile web proxy to pass through AssistPlus context root (/AssistPlus):

1. Logon on to the machine where Web Server (IIS) is hosted.
2. Go to <Agile_Home>\AgileProxies folder. (e.g. D:\Agile\Agile931\AgileProxies)
3. Open **9ias.conf** file in an editor.
4. Add the following line after similar entry for /Agile/ context:

oproxy.<AgilePLM Server Name>.urlrule=/AssistPlus/*

e.g. oproxy.MEDDEVBI.xavor.com.urlrule=/AssistPlus/*

5. Save and close the file
 6. Open **iisproxy.ini** file in an editor and look for **wlForwardPath** property.
 7. Append AssistPlus context to the value of this property
- e.g. wlForwardPath=/Agile,/AssistPlus,/JavaClient,/CoreService
8. Save and Close the file
 9. Restart the Web Server and make sure cache is refreshed.

6. Verify Installation

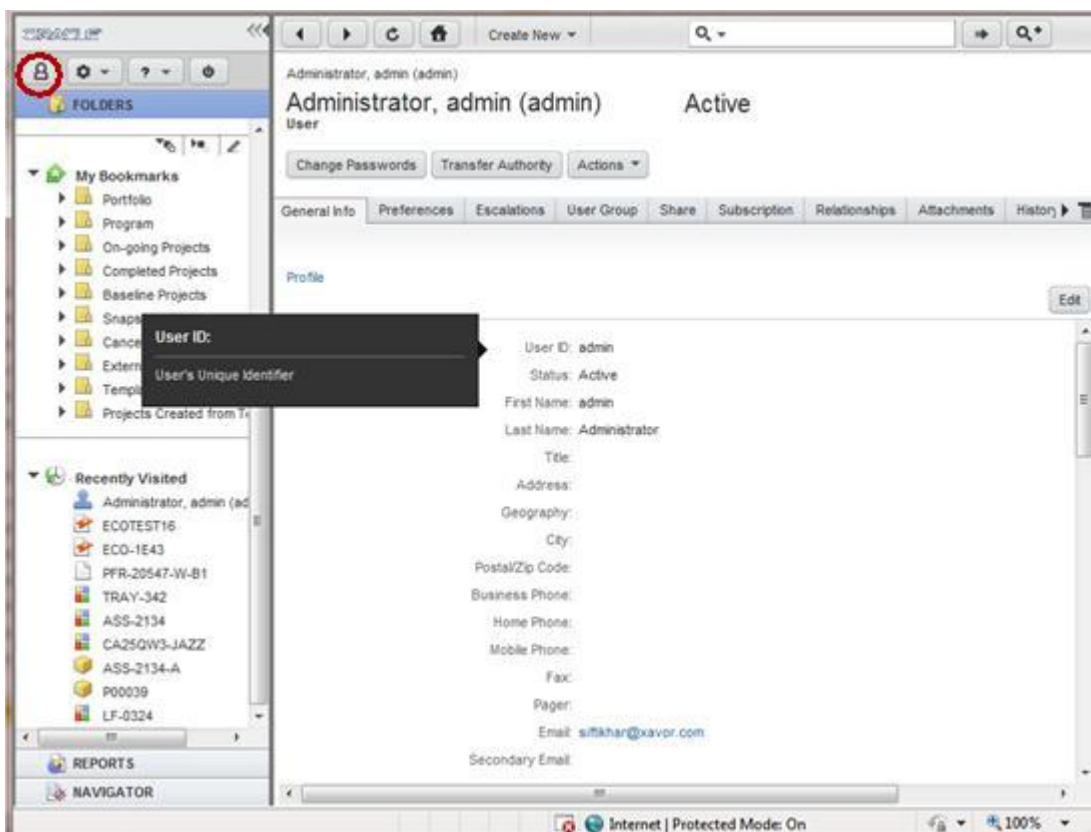
Once installed and configured, the following steps can be performed to verify working of AssistPlus application.

1. Login to Agile PLM web client as any user:

`http://<AgilePLMServer>.<DomainName>/Agile/PLMServlet`

2. Full refresh your browser in case Web Client is already opened.
3. Click on the User icon on top left corner to open the current User's page
4. Hover mouse pointer over the "User ID" field name, which will show a call-out displaying "User's Unique Identifier".

"Users > User ID" is the only assist text configured by default for verification purpose only.



Environment Variable setting for OAS

Appendix

A

This section provides instructions for creating Environment Variable required when installing AssistPlus on OAS.

Steps:

1. Login to OAS Application Server Control as admin

The screenshot displays the Oracle Enterprise Manager 10g Application Server Control console. The browser address bar shows the URL: `agileplmx.xavor.com:7777/em/console/ias/cluster/topology`. The page title is "Cluster Topology". Below the title, there is a summary section with the following data:

Hosts	Application Servers
1	1

Below this, there is a "Members" section with a "View By" dropdown set to "Application Servers". There are buttons for "Start", "Stop", and "Restart". Below these are links for "Select All", "Select None", "Expand All", and "Collapse All". A table lists the members:

Select Name	Status Type	Category	Host	CPU (%)	Memory (MB)
<input type="checkbox"/> All Application Servers					
<input type="checkbox"/> las_agile.agileplmx.xavor.com		Application Server	agileplmx.xavor.com		
<input type="checkbox"/> home (JVMs: 1)	↑	OC4J		41.64	771.76
<input type="checkbox"/> HTTP_Server	↑	Oracle HTTP Server		0.58	158.48

Below the table, there is a note: "Indicates the active ASControl instance." and a tip: "TIP If a parent topology member is selected all contained members are implicitly selected." Below this is a "Groups" section with a description: "A group is a collection of OC4J instances. Certain common management tasks can be performed simultaneously on all OC4J instances in a group. For more information, see About Groups". There are buttons for "Start", "Stop", "Delete", and "Create". Below this is a table listing the groups:

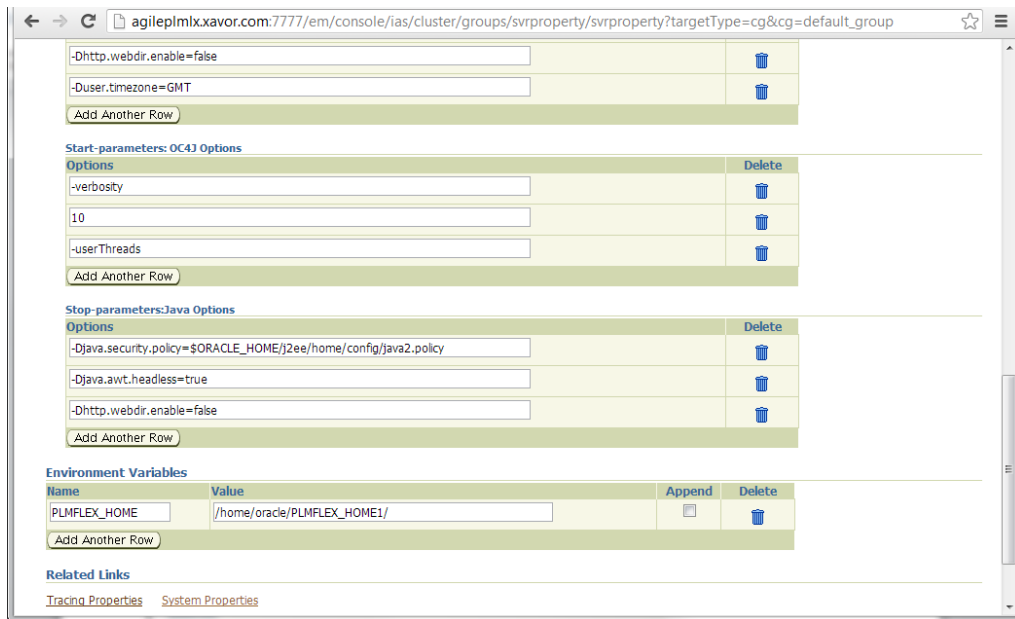
Select Name	OC4J Instance	Status	Application Server
<input checked="" type="radio"/> default_group	home	↑	las_agile.agileplmx.xavor.com

At the bottom, there is an "Administration" section.

2. Go to the Group where AssistPlus application will be deployed and open Administration tab



3. Edit Server Properties and scroll down to Environment Variables section



4. Add a variable named PLMFLEX_HOME with the folder path as value and click on Apply
5. Restart the application server instance for changes to take effect.

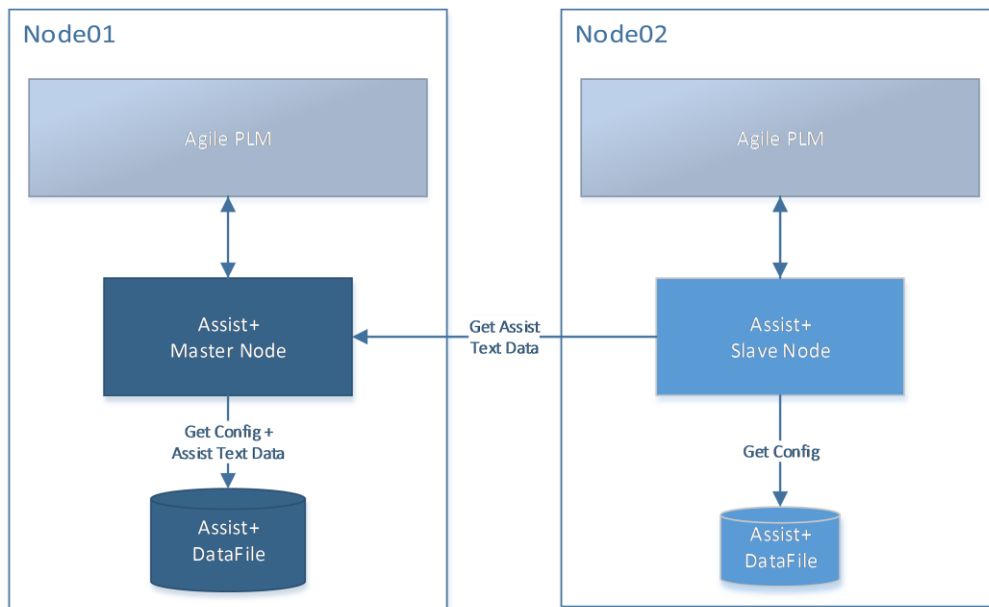
Assist+ Master/Slave Configuration

This section provides details for better understanding of the Assist+ Master/Slave configuration option.

XL Assist+ supports Master-Slave configuration in case there are multiple nodes of Agile PLM behind a load balancer. One of the AssistPlus node, in this case may serve as Master while others can refer to it for all Assist Text Data. It is assumed that the Agile PLM systems participating in this topology are similar in configuration (classes and fields).

Configuring this approach is optional and serves as an alternate to sharing configurations files between nodes over network. In case this approach is not required, all nodes can be set as Master for a regular working.

Below is an illustration of a two-node Master/Slave configuration working:



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