

TS-776

Installing Xythos WebDAV with a Supporting PostgreSQL Database on the Microsoft Windows Operating System Using the SAS[®] Configuration Wizard

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This document (TS-776) replaces TS-732 "Installation Instructions for Xythos 4.0.48 Using Native win32 PostgreSQL Version 8.0". As presented in TS-732, installation of the Xythos WebDAV (Web-based Distributed Authoring and Versioning) product and its supporting PostgreSQL database is entirely command-line driven. This has rendered the installation process very susceptible to typographical errors. Such an installation process masks errors until very late in the configuration process, thus placing BI client configurations in jeopardy.

Recent changes in the SAS Configuration Wizard tool have automated most of the installation and configuration steps. It is possible to isolate Xythos installation from the configuration of other BI components using separate XML files. This method of isolating the installation ensures that no failure will occur during the Xythos configuration which would jeopardize the rest of your BI configuration.

There is a risk of failure if you neglect to plan for the installation. However, the process presented here will help you avoid many common problems encountered during installation. Follow the steps in this document to ensure a successful installation of Xythos and its supporting PostgreSQL database.

Note the following information about references to BI installation contained in this document:

- This document does not address details regarding BI installation.
- You should thoroughly understand how to conduct a BI installation.
- The plan.xml file might require some manual updates.
- If you have questions regarding BI installation, see the appropriate publications.

Meeting Installation Prerequisites

Dealing with Previous Installations of Xythos and PostgreSQL

If you have attempted previous installations of either PostgreSQL or Xythos, you must remove certain databases. These databases reside in the following locations:

1. `%pgsql_inst%\data` delete this directory.
2. `%pgsql_inst%\tmp` delete the CONTENTS ONLY from this directory.

Creating a PostgreSQL User Account

Create a PostgreSQL user account on the operating system.

Recommended: Create credentials using default values.

- user ID = **postgres**
- password = **Admin123**

Optional: Create credentials using non-default values.

Note: You must remember these non-default values so that you will be able to supply the user ID and password in the Advanced Properties Editor of the SAS Configuration Wizard. See steps 11–15 in the succeeding section, "Installing Xythos and PostgreSQL".

Modifying the User Account in the Control Panel

Follow these steps to modify the User Account:

1. Verify that the user account you created in the preceding section is **NOT** an administrator account.
2. Windows operating system only: Grant the "Logon as a service" privilege to this account.
 - a. In the Control Panel:
 - Click **Administrative Tools**.
 - Click **Local Security Policy**.
 - b. In the folder hierarchy on the left side of the display:
 - Expand the **Local Policies** hierarchy.
 - Click **User Rights Assignment**.
 - c. Double-click **Logon as a service**.
 - d. Click **Add User or Group**.
 - e. Enter the name of the user account created in the preceding section.
 - f. Click **Check Names** to verify the account name.
3. On server versions of Windows, grant the "Allow logon locally" privilege to this account.

Creating a JAVA_HOME Environment Variable in the JDK Directory

The SAS Configuration Wizard's reliance on Java might cause the installation to fail if the Java Development Kit is absent or is of an incorrect revision.

Follow these steps to create the JAVA_HOME environment variable:

1. Right-click **My Computer** ► **Properties** ► **Advanced Tab**.
2. Click **Environment Variables**.
3. In the System variables panel area at the bottom, click **New**.
4. In the **Variable name** field, type **JAVA_HOME**.
5. In the **Variable value** field, enter your Java installation path (for example, `c:\j2sdk1.4.2_05`).

Creating and Verifying the plan.xml File

Integrated Installation:

Integrated installation assumes the following:

- Installation and configuration of Xyθος and PostgreSQL are integrated into the full BI installation.
- The full BI plan.xml file includes lines regarding the installation and configuration of Xyθος and PostgreSQL.

To prepare a plan.xml file required to support an integrated installation:

- Use the Planning File Tool to create a plan.xml file.
- Choose Xyθος and PostgreSQL along with the rest of the bundled BI products.
- Alternatively, if you wish to use a sample plan, you must add the PostgreSQL lines **manually**. Appendix A of this document contains these required lines. Sample plans are located in the **softwarenav\sampleplans** directory of your SAS Software Depot. You should edit the plan.xml file as directed in Appendix A and save a copy on your system. When prompted for the location of your plan.xml file, specify the location where you saved your customized copy.

Isolated Installation:

Isolated installation assumes the following:

- Installation and configuration of Xyθος and PostgreSQL **precedes**—and is separate and apart from—any BI installation.
- A plan.xml file to support the installation of Xyθος and PostgreSQL is created **manually**.
- BI installation follows at a future time.
- Prior to the subsequent BI installation, any lines in the plan.xml file that refer to the installation of Xyθος and PostgreSQL are removed **manually**.

To prepare the two plan.xml files required to support an isolated installation, do the following:

- Use the text contained in Appendix B to create a Xyθος/PostgreSQL plan.xml file.
- Replace the Group Name with the name of your desired configuration directory, such as **EntBIServer**. This should be the same Group Name as that which resides in your full BI plan.xml file.
- Carefully, remove the two Xyθος lines from your full BI plan.xml file.

Installing Xythos and PostgreSQL

Performing Installation of Xythos and PostgreSQL

Complete the following steps:

1. From your installation media, start SAS Software Navigator.
2. Select **Advanced** deployment.
3. Provide the location of your SID file.
4. Click **Next** to bypass the SID file details.
5. Select the **Specify a project directory that contains a customized plan** radio button. A folder hierarchy appears.
6. Browse the folder hierarchy and navigate to the location of the plan.xml file that you created in the preceding section, "Creating and Verifying the plan.xml File".

Isolated Installation	Integrated Installation
Select the plan.xml file that supports the isolated installation of Xythos and PostgreSQL	Select the plan.xml file that supports the integrated installation of Xythos and PostgreSQL

7. When the PostgreSQL installation screen appears, select the default installation location.

CAUTION: Do **NOT** change the default installation location. If you make such a change, the subsequent configuration will fail.

8. Click **Next** to complete the installation.
9. When the Xythos installation screen appears, select the default installation location.
10. Click **Next** to complete the installation.

Note: In an integrated installation, all other installations will finish before the SAS Configuration Wizard appears.

The SAS Configuration Wizard prompts you to do the following:

- Accept the default Configuration Directory or change that location.
- Supply your metadata machine name and port number (to be consistent with machine name).
- Supply user credentials and software locations (depending on the configuration of your plan.xml).

After you respond to the initial prompts, the Advanced Properties Editor appears.

Entering Credentials into the Advanced Properties Editor

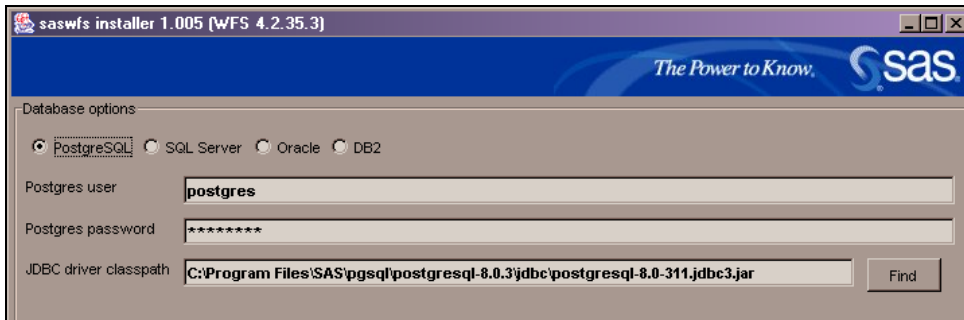
If you decided not to use the default credentials for the PostgreSQL user, it is necessary to supply alternative credentials in this editor. Skip steps 11-15 if you used the default password during your Postgres user creation.

11. Click **Edit Properties** on the Advanced Properties screen.
12. Scroll to the bottom of the editor.
13. Alter the default values for **postgres.user** and **postgres.pwd** as required.

CAUTION: Do **NOT** alter the **postgres.domain** value.

14. On the **File** menu, click **Save**.
15. On the **File** menu, click **Exit**.

16. When the SASWFS Installer's Database Options screen appears , accept all the defaults presented on the Database Options screen and continue to the next screen:



Display 1. SASWFS Installer's Database Options screen

17. Select the **Create Databases?** checkbox and continue to the next screen.



Display 2. SASWFS Installer's Global Schema and Document Store screen

Note: This screen sets the parameters for the Global Schema and Document Store. It is not necessary to alter the values presented on this screen.

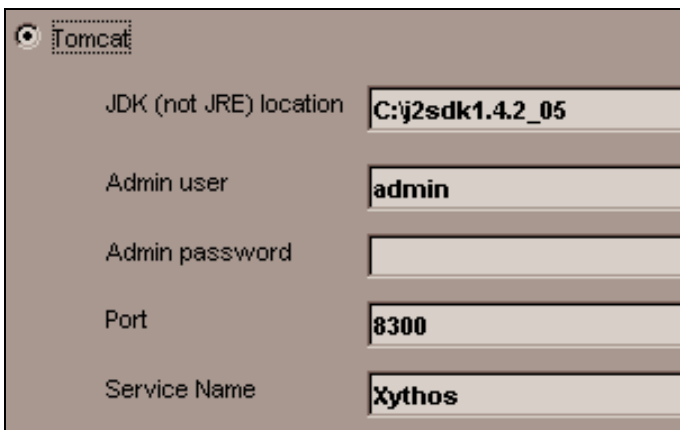
18. Provide the password for your SAS Administrator account and then proceed to the next screen.



Display 3. SASWFS Custom User Model Options screen

19. Select **Tomcat**.
20. Set a password for the Xythos Administrative Utility. This is not an OS account. Note and remember the password you choose.

Note: The wizard supplies the default Admin user “admin”, and there is no need to change it.



Display 4. SASWFS Application Server Options screen

Concluding and Verifying Successful Installation

The SASWFS Installer runs scripts and creates services in the background. When installation is complete, you see one of two screens:

- **If the installation process is successful**, you see a screen that discusses the presence of Instructions.html.
- **If the installation process is not successful**, you see a screen in which the SASWFS Installer instructs you to examine logs, such as configure_configure.log. See Appendix C for information on troubleshooting.

Note: If your plan.xml file contained only the Xythos and PostgreSQL products, it is normal for your Instructions.html file to be nearly empty. When you configure SAS[®] products that require WebDAV (such as Portal and SAS[®] Web Report Studio), you will be prompted to start Xythos.

Determining Installation Success – Alternative Methods

1. Search for Windows Services called “pgsql-8.0” and “Xythos”.
 - In the Control Panel, click **Administrative Tools**.
 - Click **Services**.
 - Search for “pgsql-8.0” and “Xythos”. Their presence indicates a successful installation.
2. Select <http://localhost:8300/xythosadmin> to invoke Xythos Admin. Use the credentials created in Step 20.

Appendix A: Xythos and PostgreSQL Lines in the Full BI plan.xml File

To integrate PostgreSQL into an existing plan.xml file:

1. Search for “_XYTHOSWEBDAV”. You should find the <DeployedComponent> tag for the Xythos WebFile Server.

Add the following lines AFTER the ending </DeployedComponent> tag line for Xythos:

```
<DeployedComponent Id="$_POSTGRESQL" Name="PostgreSQL"
  ProductName="PostgreSQL" ProductIdentifier="POSTGRESQL"
  Platform="WIN">
</DeployedComponent>
```

Note: The <DeployedComponent> tag above should extend on only one line of your plan.xml file, even though it is “wrapped” in the context of this document.

2. Search again for “_XYTHOSWEBDAV”. You should find the <ConfiguredComponent> tag for the Xythos Webfile Server.

Add the following lines AFTER the ending </ConfiguredComponent> tag line for Xythos::

```
<ConfiguredComponent Id="$_POSTGRESQL" Name="PostgreSQL"
  ProductName="PostgreSQL" ProductIdentifier="POSTGRESQL"
  Platform="WIN">
</ConfiguredComponent>
```

Note: The <ConfiguredComponent> tag above should extend on only one line of your plan.xml file, even though it is “wrapped” in the context of this document.

Appendix B: Text for a Xythos/PostgreSQL only plan.xml File

```
<?xml version="1.0" encoding="UTF-8"?>
<Metadata>
<Group Name='EntBIserver' Desc='My description of the plan.'>
<Members>
<Machine Id="$MID" Name="mid">
<DeployedComponents>
<DeployedComponent Id="$_JRE" Name="Java Runtime Environment (SAS Private
Version) - Volume 1" ProductName="Java Runtime Environment (SAS Private
Version) - Volume 1" ProductIdentifier="JRE" Platform="WIN">
</DeployedComponent>
<DeployedComponent Id="$_POSTGRESQL" Name="PostgreSQL"
ProductName="PostgreSQL" ProductIdentifier="POSTGRESQL" Platform="WIN">
</DeployedComponent>
<DeployedComponent Id="$_XYTHOSWEBDAV" Name="Xythos WebFile Server OEM
Package" ProductName="Xythos WebFile Server OEM Package"
ProductIdentifier="XYTHOSWEBDAV" Platform="WIN">
</DeployedComponent>
<ConfiguredComponent Id="$_POSTGRESQL" Name="PostgreSQL"
ProductName="PostgreSQL" ProductIdentifier="POSTGRESQL" Platform="WIN">
</ConfiguredComponent>
<ConfiguredComponent Id="$_XYTHOSWEBDAV" Name="Xythos WebFile Server OEM
Package" ProductName="Xythos WebFile Server OEM Package"
ProductIdentifier="XYTHOSWEBDAV" Platform="WIN">
</ConfiguredComponent>
</DeployedComponents>
</Machine>
</Members>
</Group>
</Metadata>
```

Appendix C: Troubleshooting

Reviewing Logs

- During installation, if you received instructions to review the configure_configure.log, the location of that log file is your configuration directory root.
- The configure_configure.log file is very difficult to interpret. Consult SAS Technical Support if necessary.
- There are two other log files that are important to review:

C:\Program Files\SAS\pgsql\postgresql-8.0.3\tmp\initdb.log
C:\Program Files\SAS\pgsql\postgresql-8.0.3\config.log

Re-Running Installation Scripts Manually

After you determine the cause of your failure, you can manually re-run the installation scripts used by the SAS Configuration Wizard:

1. Ensure that all prerequisites (see "Meeting Installation Prerequisites") are done and that you know the correct credentials for the postgres user.
2. Delete the C:\Program Files\SAS\pgsql\postgresql-8.0.3\data directory.
3. Delete the **contents only** of the C:\Program Files\SAS\pgsql\postgresql-8.0.3\tmp directory.
4. Ensure that C:\Program Files\SAS\pgsql\postgresql-8.0.3\config\postgresql_config.xml has valid account information for postgres.user and postgres.pwd.
5. Bring up a DOS window or Command Prompt and do the following:

- Change directory to:

```
C:\Program Files\SAS\pgsql\postgresql-8.0.3\config
```

- Run the command:

```
C:\Program Files\SAS\xythos\2.2\Config\apache-ant-1.6.5\bin\ant.bat" -f postgresql_config.xml
```

- Double-click Files\SAS\xythos\2.2\Config\run_config to run the SASWFS installer.

6. Use the screen shots from steps 16–20 of the preceding "Installing Xythos and PostgreSQL" section to ensure that you provide all proper values.

Note: Some defaults will not be the same when you run from the run_config batch file.