

Installation Guide

iPlanet™ Portal Server 3.0

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The *iPlanet Portal Server Installation Guide* provides overview information, and instructions to install the iPlanet™ Portal Server 3.0 software.

Who Should Use This Book

The *iPlanet Portal Server Installation Guide* is intended for system administrators installing the Portal Server software. Familiarity with basic UNIX system administration and networking is assumed.

How This Book Is Organized

This book contains the following chapters and appendices:

Chapter 1 provides an overview of installation, describes system requirements, provides diagrams, and lists the information needed for installation.

Chapter 2 contains installation procedures, and postinstallation information.

Chapter 3 contains instructions for removing the software.

Appendix A contains instructions on generating and installing SSL certificates.

Appendix B contains instructions for installing third-party software.

Documentation

Portal Server documentation includes:

- *Portal Server 3.0 Installation Guide* (this book)
- *Portal Server 3.0 Administration Guide*
- *Portal Server 3.0 Programmer's Reference Guide*

- Portal Server Release Notes
- Online Help

Online versions of the *Portal Server Installation Guide*, *Portal Server Administration Guide*, *Portal Server Programming Guide*, and Portal Server Release Notes can be found at <http://docs.iplanet.sun.com>.

Ordering Sun Documents

The SunDocsTM program provides more than 250 manuals from Sun Microsystems, Inc. If you live in the United States, Canada, Europe, or Japan, you can purchase documentation sets or individual manuals using this program.

For a list of documents and how to order them, see the catalog section of the SunStoreSM Internet site at <http://sunstore.sun.com>.

Accessing Sun Documentation Online

The docs.sun.com Web site enables you to access Solaris technical documentation online. You can browse the docs.sun.com archive or search for a specific book title or subject. The URL is <http://docs.sun.com/>.

Typographic Conventions

The following table describes the typographic changes used in this book.

Table 1 Typographic Conventions

Typeface or Symbol	Meaning	Example
AaBbCc123	The names of commands, files, and directories; on-screen computer output	Edit your <code>.login</code> file. Use <code>ls -a</code> to list all files. <code>machine_name%</code> You have mail.

Table 1 Typographic Conventions (*Continued*)

Typeface or Symbol	Meaning	Example
AaBbCc123	The names of commands, files, and directories; on-screen computer output	machine_name% su Password:
<i>AaBbCc123</i>	Command-line placeholder: replace with a real name or value	To delete a file, type <code>rm filename</code> .
<i>AaBbCc123</i>	Book titles, new words or terms, or words to be emphasized	Read Chapter 6 in <i>User's Guide</i> . These are called <i>class</i> options. You <i>must</i> be root to do this.

Shell Prompts

The following table shows the default system prompt and superuser prompts for the C shell, Bourne shell, and Korn shell.

Table 2 Shell Prompts

Shell	Prompt
C shell prompt	machine_name%
C shell superuser prompt	machine_name#
Bourne shell and Korn shell prompt	\$
Bourne shell and Korn shell superuser prompt	#

Preparing for Installation

This chapter contains an overview of the iPlanet Portal Server (Portal Server) installation, information on the Portal Server system requirements, Portal Server configuration diagrams and discussion of components, and information you need for installation, including Portal Server software installation.

Installation Overview

The Portal Server product includes two CD-ROMs, one containing the Portal Server software itself, and one containing third-party software that can be optionally installed. Third-party software that can be installed is described in Appendix B.

NOTE	The Portal Server installation also provides a way for you to backup a previous release of the Portal Server software.
-------------	--

System Requirements

This section describes the system requirements for Portal Server software. Refer to the *iPlanet Portal Server Release Notes* for the most recent information on requirements and patches. The iPlanet Portal Server Release Notes are posted at <http://docs.iplanet.com>.

Table 1-1 System Requirements

Component	Description
Operating environment	Portal Server software runs in the Solaris™ 2.6, Solaris 7, and Solaris 8 operating environments.
System	<p>Portal Server software ideally uses two computers: one computer to function as a gateway between the Internet and your internal network (the gateway component of the Portal Server product) and one computer to function as a platform and applications server (the server component of the Portal Server product).</p> <ul style="list-style-type: none">• Computer type: an E250 with 300 MHz processor is recommended for both the gateway component and server component of the Portal Server product.• Memory: the gateway component and the server component of the Portal Server product should each have a minimum of 128 Mbytes of memory.• Disk space: the gateway component of the Portal Server product should have a minimum of 100 Mbytes of free disk space; the server component of the Portal Server product should have a minimum of 500 Mbytes of free disk space.• Software: co-existence with other software is not supported.• Network interfaces: if you choose to install the optional firewall on the gateway component of the Portal Server product, the computer on which you install the firewall should have more than one network interface.

Table 1-1 System Requirements *(Continued)*

Component	Description
patches	<p>The required or recommended JDK 1.2.2 patches if you are running Solaris 2.6 are: 105490-07, 105668-14, 105210-25, 106040-13, 105633-36 (for the Asian locale) 106409-01 (displays traditional Chinese characters in Swing applications), 108091-03 or newer (for any locale that uses ISO 8859-1 or ISO 8859-15 character encoding), 105181-17, 105669-09, 105284-31. Note: These patches are the minimum required for Java 1.2.2 and are available on the Portal Server cd in:</p> <pre>./patches/solaris6/java1.2.2-05a-patches-sparc-5.6.</pre> <p>If these patches depend on other Solaris 2.6 patches, the required Solaris 2.6 patches can be found in:</p> <pre>./patches/solaris6/solaris-2.6-patch-cluster.</pre> <p>The required or recommended JDK 1.2.2 patches if you are running Solaris 7 are: 106980-05, 107636-03, 107607-01, and 108376-06 (for the Asian locale). Note: These patches are the minimum required for Java 1.2.2 and are available on the Portal Server cd in:</p> <pre>./patches/solaris7/java1.2.2-05a-patches-sparc-5.7.</pre> <p>If these patches depend on other Solaris 2.7 patches, the required Solaris 2.7 patches can be found in:</p> <pre>./patches/solaris7/solaris-2.7-patch-cluster.</pre> <p>These patches are also available at http://sunsolve.sun.com</p>
Browser	<p>A browser and an Internet connection are required for a remote client to connect to the gateway component of the Portal Server product, and for the system administrator to use the Administration Console.</p> <p>The Portal Server product supports the following browsers:</p> <ul style="list-style-type: none">• Netscape Navigator™ 4.04 or higher. Note: the Portal Server product does Netscape Navigator 4.6 because of a JavaScript bug.• Internet Explorer 4.0 or higher <p>A patch from Netscape Communications Corporation is required if you are using the Netscape browser versions 4.04 or 4.05: Patch JDK 1.1AWT. This patch can be downloaded from the following Netscape website http://developer.netscape.com/software/jdk/download.html</p>

Diagram and Components

Portal Server software has two main components:

- The gateway component of the Portal Server product
- The server component of the Portal Server product

For security reasons, the recommended installation is to put the gateway component of the Portal Server product on a computer separate from the server component. The server component and gateway component can, however, be installed on the same computer if you choose to do so.

Figure 1-1 shows a basic diagram of the Portal Server product, including the default port numbers.

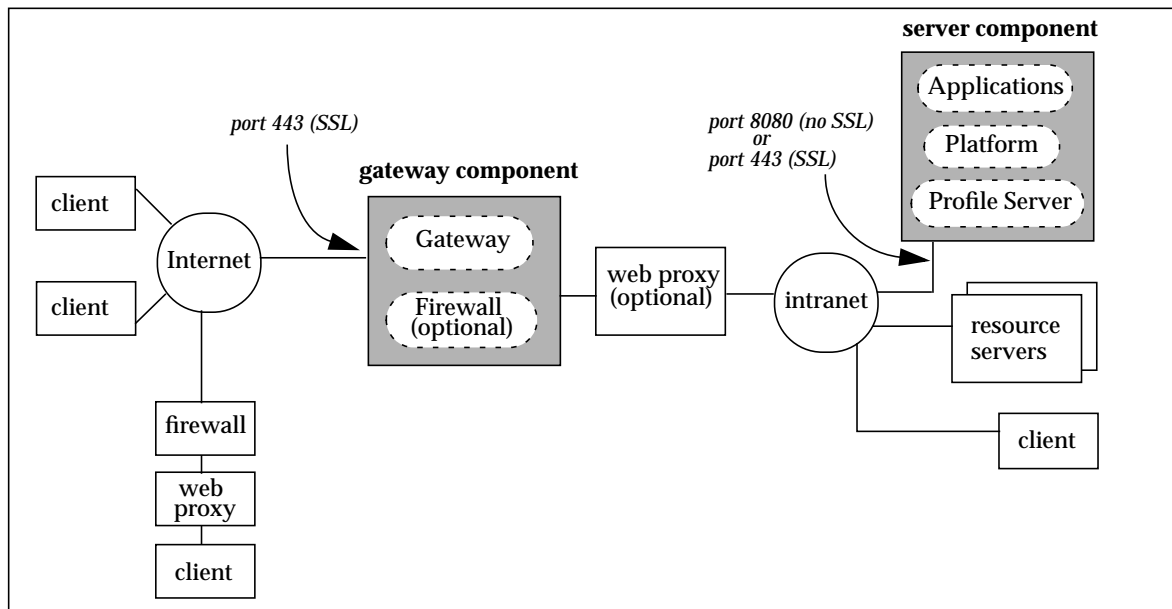


Figure 1-1 Basic Portal Server installation group

The Portal Server product also supports an installation group that includes multiple gateways communicating with multiple servers. Figure 1-2 shows a diagram of the Portal Server product in an installation group that contains multiple gateway components and server components.

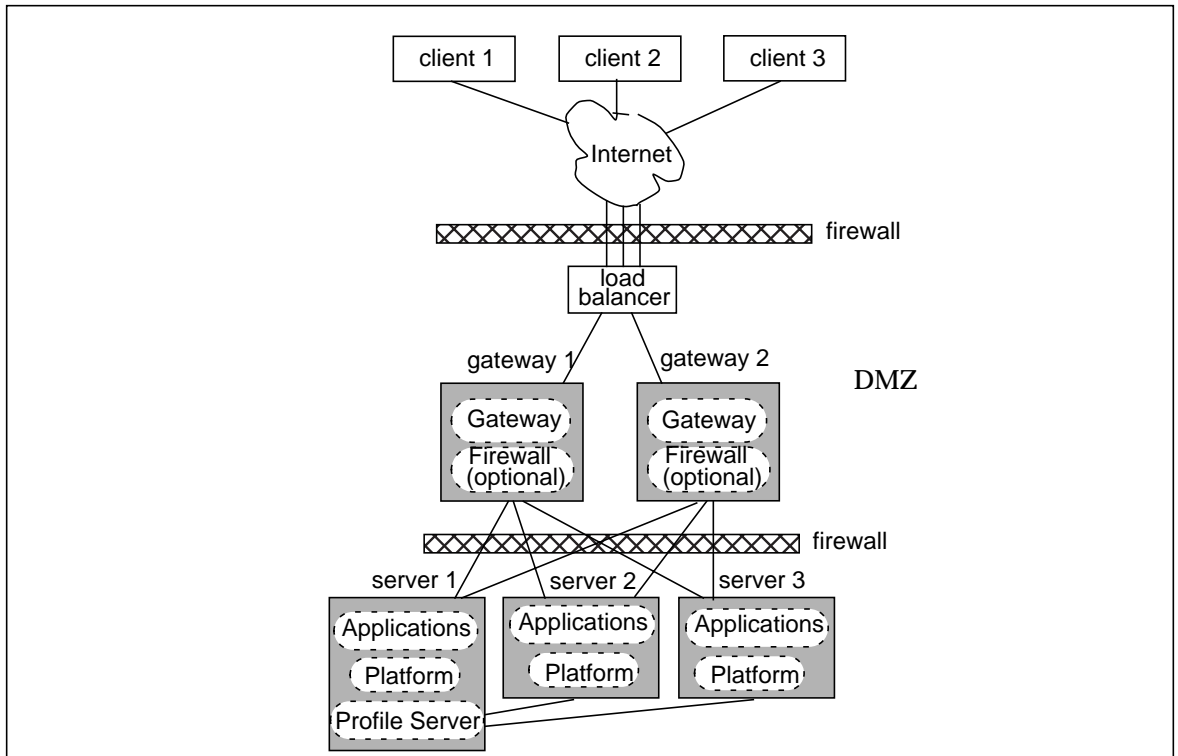


Figure 1-2 Multiple gateway and server component installation group

NOTE Gateway components of the Portal Server product can be put on the intranet as well as in the DMZ.

The gateway component of the Portal Server product

The gateway component of the Portal Server product contains the following components: the encrypting proxy (eproxy), and the optional firewall. By default, the gateway is configured to listen for client traffic from the Internet on port 443. The gateway component of the Portal Server product uses the secure socket layer protocol (SSL) to communicate with a browser, and can be configured to use SSL to communicate with the server component.

NOTE Only the eproxy port (443) is open to the Internet.

The server component of the Portal Server product

The server component of the Portal Server product contains a profile server, the platform, and the applications. (If you are using multiple server components, only one server in the installation group contains the profile server.)

The profile server stores the majority of the Portal Server platform, user, and application-specific data. The platform includes services such as authentication and logging. The applications include desktop, mail, intranet browsing, and file access.

The server component of the Portal Server product is configured to listen for traffic (non-SSL) from the gateway component of the Portal Server product on port 8080 by default; it can be configured to listen for SSL traffic from the gateway component on port 443.

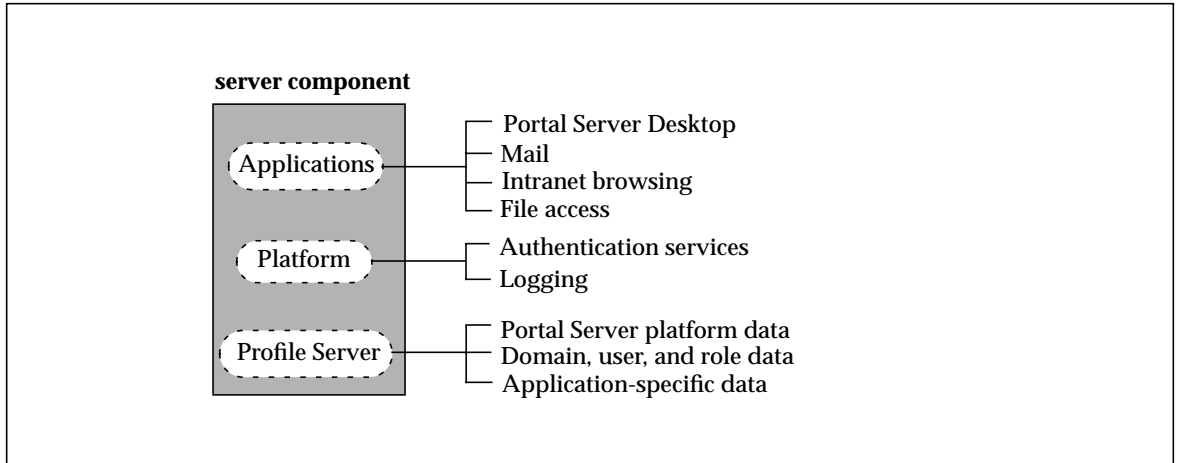


Figure 1-3 Server Component of the Portal Server Product

Portal Server clients

Portal Server clients can connect to the gateway component of the Portal Server product through the Internet or from their internal intranet. A Portal Server remote client can be directly connected to the Internet, or it can be connected through a web proxy, or a firewall or both to the Internet. All clients use a browser to access Portal Server software.

Information Needed for Portal Server Installation

You install the Portal Server software by running the `ipsinstall` installation script. There are two types of installation:

- Simple installation
- Customized installation

Simple installation

The simple installation provides default answers in brackets to most questions. The minimum information you must provide or verify when installing the Portal Server product includes:

- The host name of the gateway component of the Portal Server product

- The sub-domain name of the gateway component of the Portal Server product
- The domain name of the gateway component of the Portal Server product
- The host name of the server component of the Portal Server product
- The sub-domain name of the server component of the Portal Server product
- The domain name of the server component of the Portal Server product
- The host name of the Portal Server profile server
- The sub-domain name of the Portal Server profile server
- The domain name of the Portal Server profile server
- The administrative password
- Organization-specific information for a self-signed SSL certificate on the gateway component of the Portal Server product
- Role tree root (root organization) (server component of the Portal Server product only)

Customized installation

If you choose a customized installation, you provide the same information as for a default installation, plus you provide additional information. The customized installation allows you to change several parameters, including:

- The Portal Server base installation directory (the default is /opt)
- The profile server port (the default is 389)
- The encrypting proxy (eproxy) port (the default is 443)
- Whether SSL is used between the gateway and the server components of the Portal Server product
- Whether you are using multiple gateway components of the Portal Server product
- Whether you are using multiple server components of the Portal Server product
- The port number for the server component of the Portal Server product (the default is 443 with SSL, 8080 without SSL)
- Whether you are using a Web proxy, and if so, what computer and port to use

- What port the LDAP server uses (the default is 389)
- The Portal Server super admin user name (the default is root)
- The Admin Server port (the default is 8888)

Table 1-2 shows the information needed for installation.

Table 1-2 Installation Information

Information	Description
information for the gateway component of the Portal Server product	<p>The gateway component handles all traffic from the Internet to the intranet. The gateway also contains the optional basic firewall application.</p> <p>Installation information for the gateway component includes the host name, sub-domain name, and domain name of the external interface to the Internet of the computer on which you install the gateway component. The host name and domain names can contain up to 24 characters and can be composed of the following characters: letters (upper and lower case) numbers, the minus sign (-) and the period (.).</p>
information for the server component of the Portal Server product	<p>The server component includes the iPlanet Web Server product and services such as authentication and logging. The server component also includes applications such as desktop, mail, intranet browsing, and file access applications.</p> <p>Installation information for the server component includes the host name, sub-domain name, and domain name of the computer on which you install the platform, the applications software, and the profile server. The host name and domain names can contain up to 24 characters and can be composed of the following characters: letters (upper and lower case) numbers, the minus sign (-) and the period (.).</p>
profile server information	<p>The host name, sub-domain name, and domain name for the server component of the Portal Server product that you designate to be the profile server.</p>
installation directory	<p>Portal Server software is installed in /opt unless you specify a different directory.</p>

Table 1-2 Installation Information (*Continued*)

Information	Description
basic firewall application	<p>If your organization does not have a firewall that can be used to restrict the external access to the gateway component of the Portal Server product to port 443 (or to the port you have configured to carry SSL traffic), you have the option of installing the basic firewall application on the gateway component of the Portal Server product.</p> <p>Note, however, that the basic firewall application that comes with the iPlanet Portal Server is supported only on Solaris 2.6 and Solaris 7.</p> <p>The basic firewall application examines packets coming only to the external gateway interface, and follows these rules:</p> <ul style="list-style-type: none"> • Allows external access to port 443 (or to the port you specify for the encrypting proxy during installation) of the gateway through the gateway's public, or external, interface • Allows the gateway component access to anywhere • Allows routing information from the Internet interface on the gateway component to be updated • Denies everything not expressly allowed in the above rules <p>If you want greater control over the ports and traffic than this basic firewall application provides, consider installing a firewall product such as Sun Microsystems' SunScreen™ EFS software.</p>
network interface type	<p>If you install the basic firewall application, you specify the external interface to the Internet of the gateway computer. The computer on which you install the firewall should have more than one network interface. To list available interfaces, use the command <code>ifconfig -a</code>.</p>
network domain name	<p>The network domain name does not include the host name or subdomain name. An example of a network domain name is <code>sun.com</code>.</p>
port numbers	<p>Default port numbers are provided for the encrypting proxy (443), the server component of the Portal Server product (8080 for non-SSL communication, 443 for SSL communication), and the LDAP server port (389). If you select a customized installation, you can change these port numbers.</p> <p>The gateway component must know the port number for the server component of the Portal Server product whether or not SSL is used to communication between the two components. The Portal Server gateway installation asks for the profile server port number (8080).</p>

Table 1-2 Installation Information (*Continued*)

Information	Description
role tree root	<p>A Portal Server role tree root is the default domain of the hierarchy in the Portal Server role tree. A role tree root might refer to an organization such as Sun for example.</p> <p>At the time of installation, only one role tree root is created. The administrator can add more organizations to the role tree using the Admin Console--see the <i>iPlanet Portal Server Administration Guide</i> for more information.</p>
LDAP server	<p>The Portal Server product uses an LDAP server as a backend server for the profile server. The installation script requires you to supply a port number for the LDAP server.</p>
web proxy host	<p>A web proxy host optionally handles all HTTP requests between the gateway component and the intranet.</p> <p>If you are using a web proxy host, use the web proxy option during installation to specify the fully qualified host name of your web proxy. The gateway component will then use that proxy for all HTTP requests. This scenario is desirable if you do not want the gateway component to have the routing information it would need to find the intranet computers.</p> <p>If you do not specify a web proxy host, the gateway component will make a direct connection to intranet computers when a user tries to access one of those intranet computers.</p> <p>After installation, you can change your web proxy host or add one if you did not specify one during installation by updating the Portal Server gateway's profile on the profile server; refer to the <i>iPlanet Portal Server Administration Guide</i> for instructions.</p>
SSL communication	<p>The secure socket layer (SSL) protocol provides a way to encrypt communication between two computers. The Portal Server software uses SSL to encrypt communication between a browser and the gateway component, and, optionally, between the gateway component and the server component of the Portal Server product if they are installed on separate computers.</p> <p>By default, the gateway component communicates with the server component using unencrypted communication. During installation, you have the option of specifying that the gateway component use SSL to communicate with the server component. In this case, you must have an SSL certificate installed on each computer. The gateway component must know the server component's port number, whether or not SSL is used to communication between the two components.</p>

Table 1-2 Installation Information (*Continued*)

Information	Description
SSL certificate	<p>To have an encrypted SSL link, you must have an SSL certificate on the computers using SSL.</p> <p>A self-signed SSL certificate on the gateway component is created during Portal Server installation. To create this certificate, you must enter organization-specific information, such as company name and address, and a passphrase. Do not use the equal sign (=) in the certificate field entries.</p> <p>If you are using SSL between the gateway component and the server component, you must install an SSL certificate from a Certificate Authority vendor on the server component of the Portal Server product; refer to Appendix A for instructions on obtaining and installing an SSL certificate from a Certificate Authority vendor.</p> <p>You can create new self-signed SSL certificates, and you can request and install SSL vendor certificates at any time after installation. Refer to Appendix A for information on certificates and instructions on installing them.</p>
Portal Server admin password	The Portal Server admin password is an administration password used to manage and install certificates on the gateway component and the server component, to configure the web and LDAP servers, and to allow secure communication between the gateway components and server components.
Super Admin user name	The user ID of the Super Admin. The Super Admin user name is used to login to the admin console. The Super Admin user name must be an existing UNIX user account. Note: the password associated with the Super Admin user name is not the same as the Portal Server admin password. To login to the admin console, use the Super Admin user name and the password associated with the Super Admin.
Admin Server Port	The administration port (default 8888). If you install the Portal Server product on Solaris 8, use a port number other than 8888 because port 8888 on Solaris 8 is used for the AnswerBooks site.

Host and Network Domain Name Example

It is very important that the correct, resolvable addresses for host names and network domain names be entered during installation.

An example of a fully qualified host name is “hostname.eng.sun.com.” In this example, “hostname” is the computer name, “eng” is the subdomain name, and “sun.com” is the network domain name. This scenario is illustrated in Figure 1-4. Domain names can have more than two components, for example, “sun.co.jp” could also be a network domain name.

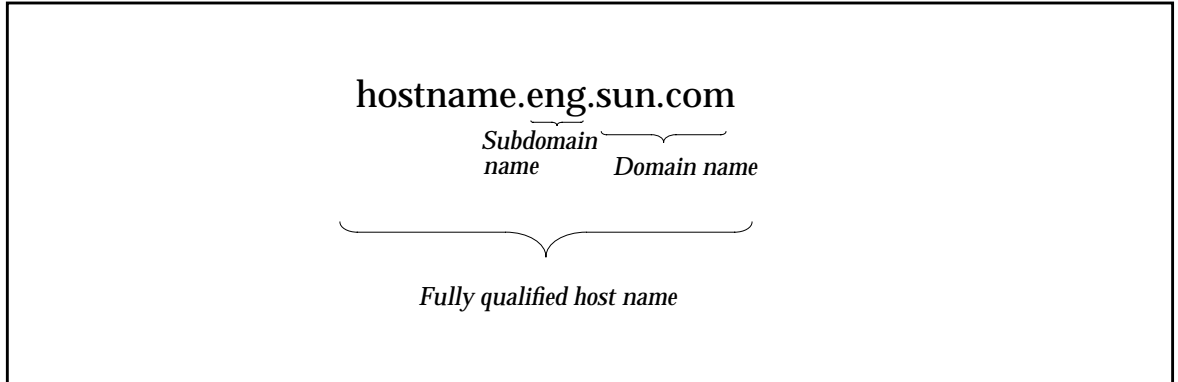


Figure 1-4 Host, Domain, and Sub-domain Name Example

Information about licenses

The Portal Server installation contains a license agreement that you must accept before installing the software. You must purchase a license from Sun Microsystems to use this product.

For information about licensing for third-party software products used with Portal Server software, contact the appropriate third-party vendor. See Appendix B, “Installing Third-Party Software” for more information about third-party software used with the Portal Server product.

Installing iPlanet Portal Server Software

The recommended installation scenario calls for the Portal Server gateway component to be installed on one computer, and for the server component with the profile server to be installed on another computer. Other possible installation scenarios are installing both components on a single computer, as well as adding multiple Portal Server gateway and server components to your Portal Server installation group. See Chapter 1 for more information on the Portal Server components.

The order of installation of the gateway component of the Portal Server product versus the server component of the Portal Server product does not matter, however:

- The server component on which the profile server resides must be installed and started before you can start the gateway component.
- Other server components with which a gateway communicates must be installed and started before you can start the gateway component.

Within each of these scenarios, you choose either a simple or a customized installation. Default answers in both types of installation are indicated in square brackets, for example: `[y] n`.

Portal Server software is installed in `/opt` by default. If you want to install in a different directory, choose the customized installation. This manual provides instructions assuming you install in `/opt`; substitute your installation directory name where appropriate.

Installation Procedures for the Portal Server Software

Refer to Table 1-2 if you need a description about the information to enter during installation.

A log of the installation is stored in

`/var/opt/SUNWips/debug/ipsinstall.log.<processnumber>`. When you start the installation script, it displays the complete name of the log. The log can be helpful if you are trying to diagnose a problem related to installation.

To install the server component of the Portal Server product: simple installation

The simple installation provides a way for you to install the server component of the Portal Server software with the following parameters automatically set for you.

- Installation directory is `/opt`
 - Profile server is on the local computer
 - Profile server port is set to 389
 - Portal Server gateway eproxy port is set to 443
 - Port number for the server component of the Portal Server product is set to 8080
 - Gateway and server components of the Portal Server product do not use SSL when communicating with each other
 - Single Portal Server gateway and server components
1. As root, mount the CD-ROM labeled “iPlanet Portal Server” on the computer that will be used as the server component of the Portal Server product.

```
# volcheck
```

2. Run the `ipsinstall` script on the server component of the Portal Server product.

```
# cd /cdrom/cdrom0
# ./ipsinstall
```

The installation script then displays the Portal Server license agreement:

```
*****
Welcome to the iPlanet Portal Server Installer (domestic release)
*****
The software for the iPlanet Portal Server product will
run without a license. However, you must have purchased
a license from Sun Microsystems to use this product.

Do you accept? [y]/n
```

3. Press Return (or `y`) to accept the license agreement and continue with the installation.
 - At this point, the installation script checks to make sure the Java Development Kit (JDK) version 1.2.2 is installed on your computer; if an earlier version is installed, or if no version is installed, the installation script asks whether you want to install JDK 1.2.2 and provides the option to re-link the Java installation directory to Java 1.2. You must have JDK 1.2.2 installed to use Portal Server software.
 - The installation script checks for required JDK 1.2.2 patches. See Table 1-1 in Chapter 1 for required patches. The install script gives you a warning message if it does not detect a required or recommended patch. To verify whether your computer requires the patches, attempt to install the patches. If your computer does not require them, the patches will not install.
 - The installation script checks for previously installed Portal Server packages; if a previous version is installed, the script displays a menu from which you can choose to backup the software or remove and reinstall the software. Reinstalling the software deletes the previous installation and

any configuration data from a previous installation. See “To backup the iPlanet Portal Server software,” on page 63 before upgrading the Portal Server software. See Chapter 3, “Removing iPlanet Portal Server Software” for more information on removing the Portal Server software.

The installation script then displays the Portal Server Installation menu:

```
Select which component to install:

1) Server
2) Gateway
3) Exit
choice? [3]
```

4. Type 1 to install the server component of the Portal Server product.

The installation script asks the question:

```
Do you want to use the default settings? [y]/n
```

5. Press Return (or **y**) to accept the default installation settings.

The installation script asks the question:

```
What should the root of the role tree be named? [sun.com]
```

NOTE The name of the role tree root does not have to be a DNS domain name; it can be any name you choose. See Chapter 1 of the *iPlanet Portal Server Administration Guide* for more information about the role tree.

6. Press Return to accept the default for the role tree root, or type another name for the root of the role tree.

NOTE If you install multiple servers, use the same name for the role tree root for every server in the Portal Server installation group.

The installation script asks you the following questions about the profile server:

```
What is the host name of the machine
where the Profile Server will run? [server1]
What is the sub-domain name (". " for none)? [eng]
What is the domain name? [sun.com]
```

7. Press Return to accept the default information for the computer on which you are installing the profile server or type different profile server information.

The installation script asks you the following questions about the gateway component of the Portal Server product:

```
What is the host name of the machine
where the Gateway Server will run? [server1]
What is the sub-domain name (". " for none)? [eng]
What is the domain name? [sun.com]
```

8. Press Return to accept the default information for the gateway component or type different gateway component information.

The installation script prompts you to type the Portal Server admin password for managing and installing certificates:

```
iPlanet Portal Server admin password (8 chars minimum):
```

9. Type the Portal Server admin password.

NOTE This password is not the same as the Super Admin password. See Table 1-2 on page 21 for information about the Portal Server admin password.

Use the same admin password for all gateway and server components of the Portal Server product in your Portal Server installation group.

The installation script prompts you to re-type the Portal Server admin password:

Re-enter iPlanet Portal Server admin password :

10. Re-type the Portal Server admin password.

The script asks you if you want to start the server component of the Portal Server product when the installation is complete.

11. Type **y** if you want to start the server component when the installation is complete, or type **n** if you do not want to start the server component of the Portal Server product. (If you type **n**, start the server component of the Portal Server product manually prior to using the Portal Server product.)

The installation script displays the following settings and asks if the settings are correct.


```

Currently selected settings:
Portal Server Server      : http://server1.eng.sun.com:8080
Portal Server Gateway    : server1.eng.sun.com:443
Profile Server           : http://server1.eng.sun.com:8080
LDAP Server              : server1.eng.sun.com:389
Role Tree Root           : sun.com
Installation Directory    : /opt
Start Portal Server Server : y

Are all settings correct? [y]/n

```

12. Press Return (or `y`) if all settings are correct, or type `n` to change the settings.

- If you type `n`, the installation script gives you the opportunity to change the settings by repeating the installation questions.
- If you type `y`, the installation script installs the packages for the server component of the Portal Server product and starts the server component if you elected to have the script start it.

When installation is complete, you are returned to the installation menu. To install the gateway component on the same computer, type `2` and see “To install the gateway component of the Portal Server product: simple installation,” on page 46. Otherwise, type `3` and proceed with step Step 13.

13. Eject the Portal Server CD-ROM.

(Any process started when the current working directory is `/cdrom/cdrom0` must be stopped before you can eject the CD-ROM.)

```

# cd /
# eject cdrom0

```

14. Start the server component manually if you did not choose to have the installation script start it for you.

```
# /opt/SUNWips/bin/ipsserver start
```

Installation of the server component of the Portal Server product is complete.

To install the server component of the Portal Server product: customized installation

The installation script provides you with a way to customize the following settings. You can specify:

- Installation directory for the packages for the server component of the Portal Server software
- Whether the local computer is the profile server
- Multiple gateways and multiple servers for your Portal Server installation group
- Whether the gateway component of the Portal Server product uses a Web proxy
- Profile server port
- Portal Server gateway eproxy port
- Whether SSL is turned on between the gateway and server components of the Portal Server product
- The port number for the server component of the Portal Server product
- Super Admin user name

NOTE If your Portal Server environment includes multiple server components, you install the profile server on only one of the server components; configure all other server components to reference that server as the profile server.

1. As root, mount the CD-ROM labeled “iPlanet Portal Server” on the computer that will be used as the server component of the Portal Server product.

```
# volcheck
```

2. Run the `ipsinstall` script on the server component of the Portal Server product.

```
# cd /cdrom/cdrom0
# ./ipsinstall
```

The installation script then displays the Portal Server license agreement:

```
*****
Welcome to the iPlanet Portal Server Installer (domestic release)
*****
The software for the iPlanet Portal Server product will
run without a license. However, you must have purchased
a license from Sun Microsystems to use this product.

Do you accept? [y]/n
```

3. Press Return (or `y`) to accept the license agreement and continue with the installation.
 - o At this point, the installation script checks to make sure the JDK version 1.2.2 is installed on your computer; if an earlier version is installed, or if no version is installed, the installation script asks whether you want to install JDK 1.2.2 and provides the option to re-link the Java installation directory to Java 1.2. You must have JDK 1.2.2 installed to use Portal Server 3.0 software.

- The installation script checks for required JDK 1.2.2 patches. See Table 1-1 in Chapter 1 for required patches. The install script gives you a warning message if it does not detect a required or recommended patch. To verify whether your computer requires the patches, attempt to install the patches. If your computer does not require them, the patches will not install.
- The installation script checks for previously installed Portal Server packages; if a previous version is installed, the script displays a menu from which you can choose to backup the software or remove and reinstall the software. Reinstalling the software deletes the previous installation and any configuration data from a previous installation. See “To backup the iPlanet Portal Server software,” on page 63 before upgrading the Portal Server software. See Chapter 3, “Removing iPlanet Portal Server Software” for more information on removing the Portal Server software.

The installation script then displays the Portal Server Installation menu:

```
*****
Welcome to the iPlanet Portal Server Installer (domestic release)
*****
...
1) Server
2) Gateway
3) Exit
choice: [3]
```

4. Type **1** to install the server component of the Portal Server product.

The installation script asks the question:

```
Do you want to use the default settings? [y]/n
```

5. Type **n** to provide your own installation settings.

The installation script asks the question:

```
What should the root of the role tree be named? [sun.com]
```

NOTE The name of the role tree root does not have to be a DNS domain name; it can be any name you choose. See Chapter 1 of the *iPlanet Portal Server Administration Guide* for more information about the role tree.

6. Press Return to accept the default for the role tree root, or type another name.

NOTE If you install multiple servers, use the same name for the role tree root for every server in the Portal Server installation group.

The installation script asks the question:

```
What directory do you want to install the server in? [/opt]
```

7. Press Return to accept the default for the installation directory, or type a different directory name.

The installation script asks the question:

```
Should the local machine be the profile server? [y]/n
```

8. Choose whether you want the local computer to be the profile server.

NOTE If your Portal Server environment includes multiple server components, you install the profile server on only one of the server components; configure all other server components to reference that server as the profile server.

- Press Return to make the local computer the profile server. If you have not already installed the profile server on another computer, you can choose **y** to make the local computer the profile server.
- Type **n** if you have already installed the profile server on another computer.

The installation script asks you the following set of questions about the profile server:

```
What is the host name of the machine
where the Profile Server will run? [server1]
What is the sub-domain name (". " for none)?[eng]
What is the domain name? [sun.com]
```

9. Press Return to accept the default for the profile server information or type different profile server information.
- If the local computer is *not* the profile server, go to Step 13.
 - If the local computer is the profile server, the installation script asks the question:

```
What port should the LDAP server use? [389]
```

10. Press Return to accept the default for the port number of the LDAP server (389), or type a different port number.

The installation script asks the question:

```
What is the Portal Server super admin user name? [root]
```

11. Press Return to accept the default Super Admin user name, or type your own choice for the name.

NOTE The Super Admin user name must be an existing UNIX user account, however you can change the name after installation.

The installation script asks the question:

```
Will/Do you have multiple servers in this install group? y/[n]
```

12. Specify whether you want multiple server components of the Portal Server product.
- If you type **n**, go to Step 14.
 - If you type **y**, the installation script asks you the following set of questions about the server components of the Portal Server product:

```
What is the host name of the machine
where the Portal Server Server will run? [server1]
What is the sub-domain name ( "." for none)? [eng]
What is the domain name? [sun.com]
```

13. Type the server component information.

NOTE Do not accept the default host name of the server component if both of the following conditions apply:

- You specified multiple server components of the Portal Server product
 - You want to specify the host name and domain name information for the server components of the Portal Server product
-

- If the local computer is *not* the profile server, go to Step 15.

If the local computer is the profile server and you specified multiple server components, the script repeats the set of questions until you have specified information for all the desired server components. Enter a blank line after you have finished adding all information for the server components. For instructions on adding or removing server components after installation, refer to Chapter 10 of the *iPlanet Portal Server Administration Guide*.

The installation script asks the question:

```
Will/Do you have multiple gateways in this install group? y/[n]
```

- 14.** Press Return if you want to specify multiple Portal Server gateways or type **n** if you do not want to specify multiple Portal Server gateways.

The installation script asks you the following set of questions about the gateway component:

```
What is the host name of the machine
where the Gateway Server will run? [server1]
What is the sub-domain name? [eng]
What is the domain name? [sun.com]
```

- 15.** Type the Portal Server gateway information.

-
- NOTE** Do not accept the default value for the gateway component's host name if both of the following conditions apply:
- You specified multiple gateway components
 - You want to specify host name and domain name information for the gateway components.
-

If the local computer is the profile server and you specified multiple gateway components, the script repeats the set of gateway component questions until you have specified information for all the desired gateway components. Enter a blank line after you have finished adding all the gateway component information. For instructions on adding or removing gateway components after installation, refer to Chapter 10 of the *iPlanet Portal Server Administration Guide*.

The installation script asks the question:

```
Should this/these gateway(s) use a web proxy? y/[n]
```

16. Press Return if you want the Portal Server gateway component to use a Web proxy, or type **n** if you do not want to use a Web proxy.

- If you type **n**, go to Step 19.
- If you type **y**, continue with Step 17.

The installation script asks you the following questions about the Web proxy:

```
What is the host name of the machine
to use for the gateway's web proxy? []
What is the sub-domain name ( "." for none)? [eng]
What is the domain name? [sun.com]
```

17. Press Return to accept the default naming information for the Web proxy or type different Web proxy information.

The installation script asks you the following question:

```
What port number does the web proxy run on? [8080]
```

18. Press Return to accept the default for the Web proxy server port number or type a different port number.

The installation script asks the question:

```
What port will the gateway encrypting proxy (eproxy) run on?  
[443]
```

19. Press Return to accept the default eproxy port number or type a different port number. For more information on the eproxy see the *iPlanet Portal Server Administration Guide*.

If you install the server component and the gateway component on different machines, the installation script asks the question:

```
Do you want to run SSL between the iPlanet Portal Server  
Gateway(s) and Server(s)? y/[n]
```

20. Choose whether you want to use SSL between the gateway and server components of the Portal Server product. If you choose **y**, refer to Appendix A, “Generating and Installing SSL Certificates” for information about installing an SSL certificate on the Web server.

- o If you choose **y**, the installation script asks the question:

```
What is the Profile Server port? [443]
```

NOTE If you install the server component and the gateway component on the same computer, do not use the same port numbers for different services.

- If you choose **n**, the installation script asks the question:

```
What is the Profile Server port? [8080]
```

21. Press Return to accept the default for the profile server port number or type a different port number.

NOTE If you install the server component and the gateway component of the Portal Server product on the same computer, do not use the same port numbers for different services.

The installation script asks the question:

```
What is the Admin Server port? [8888]
```

22. Press Return to accept the default for the Admin Server port number or type a different port number.

NOTE If you install the Portal Server software on Solaris 8, choose a port other than 8888 for the Admin Server port. (Port 8888 is the port used for the Solaris AnswerBook site.)

The installation script prompts you to type the Portal Server admin password:

```
iPlanet Portal Server admin password (8 chars minimum):
```

23. Type the Portal Server Admin password.

NOTE This password is not the same as the Super Admin password. See Table 1-2 on page 21 for information about the Portal Server admin password.

Use the same admin password for all gateway and server components of the Portal Server product in your Portal Server installation group.

The installation script prompts you to re-type the Portal Server Admin password:

```
Re-enter iPlanet Portal Server admin password:
```

24. Re-type the admin password to verify it.

The installation script displays the following settings and asks if the settings are correct:

```
Currently selected settings:
```

```
Portal Server Servers      : https://server2.eng.sun.com:444
Portal Server Gateway     : gateway1.eng.sun.com:333,103333
Profile Server            : https://server1.eng.sun.com:444
LDAP Server               : server1.eng.sun.com:389
Role Tree Root            : sun.com
Installation Directory     : /opt
Start Portal Server Server : y
```

```
Are all settings correct? [y]/n
```

25. Press Return if all settings are correct or type **n** to change the settings.

- If you type **n**, the installation script gives you the opportunity to change the settings by repeating the installation questions.
- If you choose **y**, the installation script installs the Portal Server packages. If you elected to have the script start the server component, it is started at this point.

When the installation is complete, you are returned to the installation menu.

- Choose **3** to exit. Proceed with Step 26.
- Choose **2** to install the gateway component on the same machine. See “To install the gateway component of the Portal Server product: simple installation,” on page 46.

26. Eject the Portal Server CD-ROM.

(Any process started when the current working directory is `/cdrom/cdrom0` must be stopped before you can eject the CD-ROM.)

```
# cd /
# eject cdrom0
```

27. Start the server component manually if you did not choose to have the installation script start it for you.

NOTE If you chose to use SSL for communication between the gateway and server components, add the SSL certificate to the server component. See Appendix A, “Generating and Installing SSL Certificates” on page 73.

To start the server component, type:

```
# /opt/SUNWips/bin/ipssserver start
```

Installation of the server component of the Portal Server product is complete.

To install the gateway component of the Portal Server product: simple installation

The simple installation provides a way for you to install the gateway component of the Portal Server product with the following parameters automatically set for you.

- Installation directory is `/opt`
- Portal Server gateway and server components do not use SSL when communicating with each other
- Port number for the gateway component of the Portal Server product is set to 443
- Port number for the server component of the Portal Server product is set to 8080
- No Web proxy

If you want to define other values for these options at the time of installation, see “To install the gateway component of the Portal Server product: customized installation,” on page 54.

1. As root, mount the CD-ROM labeled “iPlanet Portal Server” on the computer that will be used as the gateway component of the Portal Server product.

```
# volcheck
```

2. Run the `ipsinstall` script on the gateway component of the Portal Server product.

```
# cd /cdrom/cdrom0
# ./ipsinstall
```

The installation script then displays the Portal Server license agreement:

```
*****
Welcome to the iPlanet Portal Server Installer (domestic release)
*****
The software for the iPlanet Portal Server product will
run without a license. However, you must have purchased
a license from Sun Microsystems to use this product.

Do you accept? [y]/n
```

3. Press Return (or `y`) to accept the license agreement and continue with the installation.
 - o The installation script checks to make sure JDK version 1.2.2 is installed on your computer; if an earlier version is installed, or if no version is installed, the installation script asks whether you want to install JDK 1.2.2 and provides the option to re-link the Java installation directory to Java 1.2. You must have JDK 1.2.2 installed to use Portal Server 3.0 software.

- The installation script checks for required JDK 1.2.2 patches. See Table 1-1 in Chapter 1 for required patches. The install script gives you a warning message if it does not detect a required or recommended patch. To verify whether your computer requires the patches, attempt to install the patches. If your computer does not require them, the patches will not install.
- The installation script checks for previously installed Portal Server packages; if a previous version is installed, the script displays a menu from which you can choose to backup the software or remove and reinstall the software. See “To backup the iPlanet Portal Server software,” on page 63 for more information on upgrading the Portal Server software. See Chapter 3, “Removing iPlanet Portal Server Software” for more information on removing the Portal Server software.

The installation script displays the installation menu:

```
Select which component to install:
```

- ```
1) Server
2) Gateway
3) Exit
```

```
Choice? [3]
```

**4.** Type 2 to install the gateway component.

The installation script asks the question:

```
Install the firewall on this system? [y]/n
```

---

**CAUTION** Do not install this firewall on Solaris 8. The firewall included with the Portal Server software is not supported on Solaris 8.

---



5. Press Return (or **y**) to install the firewall. Install the firewall only if the gateway component has more than one network interface.

---

**CAUTION** Do not install this firewall on Solaris 8. The firewall included with the Portal Server software is not supported on Solaris 8.

---

The installation script asks the question:

```
Do you want to use the default settings? [y]/n
```

6. Press Return (or **y**) to accept the default installation settings.

The installation script asks you the following questions about the gateway component:

```
What is the host name of the machine
where the Gateway Server will run? [gateway1]
What is the sub-domain name ("." for none)? [eng]
What is the domain name? [sun.com]
```

7. Press Return to accept the default information for the external interface to the Internet of the computer on which you are installing the gateway component or type different gateway information.

The installation script asks you the following questions about the profile server:

```
What is the host name of the machine
where the Profile Server is running? [gateway1]
What is the sub-domain name ("." for none)? [eng]
What is the domain name? [sun.com]
```

8. Press Return to accept the default information for the profile server or type different profile server information.

The installation script prompts you to type the Portal Server admin password for managing and installing certificates:

```
iPlanet Portal Server admin password (8 chars minimum):
```

9. Type the Portal Server admin password.

The installation script prompts you to re-type the Portal Server admin password:

```
Re-enter iPlanet Portal Server admin password :
```

10. Re-type the Portal Server admin password to verify it.

---

**NOTE** This password is not the same as the Super Admin password. See Table 1-2 on page 21 for information about the Portal Server admin password.

Use the same Portal Server admin password for each server and gateway component in your Portal Server installation group.

---

The installation script checks to see if a self-signed certificate for the SSL server exists on the gateway component.

- If a certificate does not exist, the script starts to create one. Go to Step 12.
  - If a certificate exists, the script asks if you want to create one. Continue with Step 11.
11. Type **y** to use an existing self-signed certificate for the gateway SSL server, or type **n** to create a new self-signed certificate.
    - If you type **y** to use an existing self-signed certificate, go to Step 13.

- If you type **n** to create a new self-signed certificate, continue with Step 12.

If you choose to create a self-signed certificate, the script asks for the following organization-specific information for your certificate:

```
What is the name of your organization (ex: Company)? []
What is the name of your organizational unit (ex: division)? []
What is the name of your City or Locality? []
What is the name of your State or Province? []
What is the two-letter country code for this unit? []
```

## 12. Type the organization-specific information for your new certificate.

The installation script asks the question:

```
Do you want to start the iPlanet Portal Server Gateway
when installation is complete? y/[n]
```

## 13. Choose whether you want the installation script to start the gateway component when you are finished installing.

- Press Return (or **n**) if you do not want to start the gateway component. (If you type **n** and chose to install the firewall, reboot the computer and start the gateway component manually prior to using the Portal Server product.)
- Type **y** if you want the installation script to start the gateway component when you are finished installing.

The installation script displays the following settings and asks if the settings are correct:

```
Currently selected settings:
 Profile Server : http://gateway1.eng.sun.com:8080
 Installation Directory : /opt
 Portal Server Gateway : gateway1.eng.sun.com:443
 Start Portal Server Gateway : y
 Install Firewall : n

Are all settings correct? [y]/n
```

**14.** Press Return (or **y**) if all settings are correct, or type **n** to change the settings.

- If you choose **n**, the installation script gives you the opportunity to change the settings by repeating the installation questions.
- If you accept the settings, the installation script installs the Portal Server gateway packages. If you installed the basic firewall and elected to have the script reboot your computer after installation, the script reboots your computer at this point. If you elected not to have the script reboot your computer after installation, reboot it manually after the installation is complete.

When the installation is complete, you are returned to the installation menu.

- Choose **3** to exit. Proceed with Step 15.
- Choose **1** to install the server component on the same machine. See “To install the server component of the Portal Server product: simple installation,” on page 28.

**15.** Eject the CD-ROM.

(Any process started when the current working directory is `/cdrom/cdrom0` must be stopped before you can eject the CD-ROM.)

```
cd /
eject cdrom
```

16. If you installed the basic firewall, become root and configure the basic firewall on the gateway component by doing the following:

Reboot the gateway component manually if you did not reboot it using the installation script.

```
sync; init 6
```

Wait for the computer to reboot (about five minutes) before proceeding.

17. Run the firewall configuration script on the gateway component of the Portal Server product.

---

**NOTE**

If you installed the gateway and firewall on a *headless* computer (that is, a computer without a monitor and keyboard), you must connect to the Portal Server gateway computer from the intranet using `rlogin`, `rsh`, or `telnet`.

---

```
cd /opt/SUNWwtfw/bin
./fw.configure
```

The firewall configuration script prompts you to specify the gateway interface:

```
Enter the gateway interface:
```

- a. Type the name of the gateway network interface that is connected to the Internet, for example, hme0.

(Use the command `ifconfig -a` to list available interfaces.)

The firewall configuration script configures the firewall. When configuration is complete, your prompt returns.

- b. Reboot the Portal Server gateway.

```
sync; init 6
```

The Portal Server gateway software installation is complete.

## To install the gateway component of the Portal Server product: customized installation

The installation script provides you with a way to customize the following settings. You can specify:

- The installation directory for the Portal Server gateway packages
- The Portal Server gateway eproxy port
- Whether SSL is turned on between the gateway and server components
- The port for the server component of the Portal Server product

1. As root, mount the CD-ROM labeled “iPlanet Portal Server” on the computer that will be used as the Portal Server gateway.

```
volcheck
```

2. Run the `ipsinstall` script on the gateway component of the Portal Server product.

```
cd /cdrom/cdrom0
./ipsinstall
```

The installation script then displays the Portal Server license agreement:

```

Welcome to the iPlanet Portal Server Installer (domestic release)

The software for the iPlanet Portal Server product will
run without a license. However, you must have purchased
a license from Sun Microsystems to use this product.

Do you accept? [y]/n
```

3. Press Return (or **y**) to accept the license agreement and continue with the installation.
  - At this point, the installation script checks to make sure the JDK version 1.2.2 is installed on your computer; if an earlier version is installed, or if no version is installed, the installation script asks whether you want to install JDK 1.2.2 and provides the option to re-link the Java installation directory to Java 1.2. You must have JDK 1.2.2 installed to use Portal Server 3.0 software.
  - The installation script checks for required JDK 1.2.2 patches. See Table 1-1 in Chapter 1 for required patches. The install script gives you a warning message if it does not detect a required or recommended patch. To verify whether your computer requires the patches, attempt to install the patches. If your computer does not require them, the patches will not install.

- The installation script checks for previously installed Portal Server packages; if a previous version is installed, the script displays a menu from which you can choose to backup the software or remove and reinstall the software. See “To backup the iPlanet Portal Server software,” on page 63 for more information on upgrading the Portal Server software. See Chapter 3, “Removing iPlanet Portal Server Software” for more information on removing the Portal Server software.

The installation script displays the installation menu:

```
Select which component to install:

1) Server
2) Gateway
3) Exit

Choice? [3]
```

**4.** Type 2 to install the gateway.

The installation script asks the question:

```
Install the firewall on this system? [y]/n
```

---

**CAUTION** Do not install this firewall on Solaris 8. The firewall included with the Portal Server software is not supported on Solaris 8.

---



5. Press Return to install the basic firewall or type **n** if you do not want to install the basic firewall.

If you type **n**, the basic firewall will not be installed. In this case, you should close all access to the gateway computer from the Internet except for port 443 (the default encrypting proxy port). The method for closing access to your gateway computer depends on the type of computer you are using.

The installation script then asks the question:

```
Do you want to use the default settings? [y]/n
```

6. Type **n** to provide your own installation settings.

The installation script asks the question:

```
What directory do you want to install the gateway in? [/opt]
```

7. Press Return to accept the default for the installation directory (/opt), or type a different directory name.

The installation script asks you the following questions about the gateway component:

```
What is the host name of the machine
where the Gateway Server will run? [gateway1]
What is the sub-domain name ("." for none)? [eng]
What is the domain name? [sun.com]
```

8. Press Return to accept the default naming information for the external interface to the Internet of the computer on which you are installing the gateway component or type different gateway component information.

The installation script asks you the following question:

```
What port will the gateway encrypting proxy (eproxy) run on?
[443]
```

9. Press Return to accept the default port number or type a different port number. For more information on the eproxy see the *iPlanet Portal Server Administration Guide*.

The installation script asks you the following questions about the profile server:

```
What is the host name of the machine
where the Profile Server is running? [gateway1]
What is the sub-domain name (". " for none)? [eng]
What is the domain name? [sun.com]
```

10. Press Return to accept the default naming information for the computer on which the profile server is installed or type different profile server information.

---

|             |                                                                                                                                                                                                                                                                                                |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>NOTE</b> | If your Portal Server installation environment includes more than one server component, install the profile server on only one server component. When you install the Portal Server gateway components, complete Step 10 by typing the name and domain name information of the profile server. |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

---

The installation script asks the following question:

```
What is the Portal Server Server port? [8080]
```

11. Press Return to accept the default for the server component's port number or type a different port number.

The installation script prompts you to type the Portal Server admin password:

```
iPlanet Portal Server admin password (8 chars minimum):
```

12. Type the Portal Server admin password.

---

|             |                                                                                                                                             |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <b>NOTE</b> | This password is not the same as the Super Admin password. See Table 1-2 on page 21 for information about the Portal Server admin password. |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------|

Use the same Portal Server admin password for each server and gateway component in your Portal Server installation group.

---

The installation script prompts you to re-type the Portal Server admin password:

```
Re-enter iPlanet Portal Server admin password :
```

13. Re-type the Portal Server admin password to verify it.

The installation script checks to see if a self-signed certificate for the SSL server exists on the gateway component.

- If a certificate does not exist, the script starts to create one. Go to Step 15.
- If a certificate exists, the script asks if you want to create one. Continue with Step 14.

14. Type **y** to use an existing self-signed certificate for the gateway SSL server, or type **n** to create a new self-signed certificate.

- If you type **y** to use an existing self-signed certificate, go to Step 16.

- If you type **n** to create a new self-signed certificate, continue with Step 15.

If you choose to create a self-signed certificate, the script asks for the following organization-specific information for your certificate:

```
What is the name of your organization (ex: Company)? []
What is the name of your organizational unit (ex: Division)? []
What is the name of your City or Locality? []
What is the name of your State or Province? []
What is the two-letter country code for this unit? []
```

**15. Type the organization-specific information for your new certificate.**

When the gateway SSL certificate is completed, the installation script asks the question:

```
Do you want to start the iPlanet Portal Server Gateway
when installation is complete? y/[n]
```

**16. Choose whether you want the installation script to start the gateway component when you are finished installing.**

- Press Return (or **n**) if you do not want to start the gateway component. If you type **n** and installed the firewall, reboot the computer and start the gateway component manually prior to using the Portal Server product. For instructions on starting the gateway component manually, see page 66.
- Type **y** if you want the installation script to start the Portal Server gateway when you are finished installing.

The installation script displays the following settings and asks if the settings are correct.

```

Currently selected settings:
 Profile Server : http://gateway1.eng.sun.com:443
 Installation Directory : /opt
 Portal Server Gateway : gateway1.eng.sun.com:443
 Start Portal Server Gateway : y
 Install Firewall : n
 Web Proxy : false

```

```
Are all settings correct? y/[n]
```

**17. Press Return (or `n`) if you want to change the settings, or type `y` if the settings are correct.**

- If you type `n`, the installation script gives you the opportunity to change the settings by repeating the installation questions.
- If you accept the settings, the installation script installs the Portal Server gateway packages. (If you installed the basic firewall and elected to have the script reboot your computer after installation, the script reboots your computer at this point.)

When the installation is complete, you are returned to the installation menu.

- Choose `3` to exit. Proceed with Step 26.
- Choose `1` to install the server component on the same machine. See “To install the server component of the Portal Server product: simple installation,” on page 28.

**18. Eject the CD-ROM.**

(Any process started when the current working directory is `/cdrom/cdrom0` must be stopped before you can eject the CD-ROM.)

```

cd /
eject cdrom

```

19. If you installed the basic firewall, as root, configure the basic firewall on the gateway component, perform the following steps:

Reboot the gateway component manually if you did not reboot it using the installation script.

```
sync; init 6
```

Wait for the computer to reboot (about five minutes) before proceeding.

20. Run the firewall configuration script on the gateway component.

---

|             |                                                                                                                                                                                                                                                                                           |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>NOTE</b> | If you installed the gateway and firewall components on a <i>headless</i> computer (that is, a computer without a monitor and keyboard), you must connect to the Portal Server gateway computer from the intranet using <code>rlogin</code> , <code>rsh</code> , or <code>telnet</code> . |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

---

```
cd /opt/SUNWipsw/bin
./fw.configure
```

The firewall configuration script prompts you to specify the Portal Server gateway interface:

```
Enter the gateway interface:
```

21. Type the gateway network interface that is connected to the Internet.

(Use the command `ifconfig -a` to list available interfaces.)

The firewall configuration script configures the firewall. When configuration is complete, your prompt returns.

22. Reboot the Portal Server gateway.

```
sync; init 6
```

Installation of the gateway component of the the Portal Server product is complete.

## To backup the iPlanet Portal Server software

The backup procedure backs up all data and all files associated with the release that you are backing up. Backup the Portal Server software if you have a previous version of the Portal Server software installed, and you want to back up the data from that installation before you install a newer version of the software. If you have made customizations to a previous installation, backing up the old version provides a way for you to retrieve the customizations later.

To backup a previous Portal Server installation, run the installation script on each computer that the iPlanet 2.0 or 2.0.1 software has been installed on.

---

|             |                                                                                                                                                                                        |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>NOTE</b> | Review “Information Needed for Portal Server Installation,” on page 19 to familiarize yourself with the information about new features, in particular, the profile server information. |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

---

1. As root, mount the CD-ROM labeled “iPlanet Portal Server” on the computer that will be used as the server component of the Portal Server product.

```
volcheck
```

2. Run the `ipsinstall` script on the computer that contains the Portal Server software that you want to backup.

```
cd /cdrom/cdrom0
./ipsinstall
```

- At this point, the installation script checks to make sure the JDK version 1.2.2 is installed on your computer; if an earlier version is installed, or if no version is installed, the installation script asks whether you want to install JDK 1.2.2 and provides the option to re-link the Java installation directory to Java 1.2. You must have JDK 1.2.2 installed to use Portal Server 3.0 software.

The installation script displays the following menu:

```
1) Back up existing product, remove, and continue
2) Remove existing product, then continue
3) Continue without removing existing product
4) Exit install
```

3. Choose the backup option from the menu.

If you choose to backup the software, the script prompts you to save it in the `/tmp` directory or type another directory name. This directory should be at least 600MB.

```
Directory? [/tmp]
```



---

**NOTE** Data stored in `/tmp` is lost when the computer is rebooted. Type another directory if you plan to reboot the computer, for example `/var/opt`.

---

After the previous version of the Portal Server software has been removed, the installation script displays the Portal Server Installation menu:

```
Select which component to install:
```

- ```
1) Server
2) Gateway
3) Exit
```

4. Continue the upgrade procedure by installing the new Portal Server software. Go to Chapter 2, Step 4 of the installation procedure that applies to the type of installation you want to perform. You can perform the following types of Portal Server installations:
 - “To install the gateway component of the Portal Server product: simple installation”
 - “To install the gateway component of the Portal Server product: customized installation”
 - “To install the server component of the Portal Server product: simple installation”
 - “To install the server component of the Portal Server product: customized installation”

NOTE Minimally, the Portal Server installation group must include:

- The software for the gateway component of the Portal Server product
- The software for the server component of the Portal Server product.

For information on installing third-party software, see Appendix B, “Installing Third-Party Software.”

To verify that the Portal Server gateway and server components are running

- Open a Web browser and go to the URL `https://<Portal Server_gateway>`.
If the Authenticator selection page appears, the Portal Server gateway and server components are running.

Troubleshooting

If the Authenticator selection page does not appear or you receive an error message, such as `Connection refused`, try the following steps:

- Stop and restart the server component of the Portal Server product. This example assumes that `/opt` is the installation directory.

```
# /opt/SUNWips/bin/ipsserver stop
# /opt/SUNWips/bin/ipsserver start
```

- Stop and restart the gateway component of the Portal Server product. This example assumes that `/opt` is the installation directory.

```
# /opt/SUNWips/bin/ipsgateway stop
# /opt/SUNWips/bin/ipsgateway start
```

- Make sure the firewall is allowing connections through port 443. This example assumes that `/opt` is the installation directory.

```
# /opt/SUNWwtfw/bin/fw.rule list
```

Error logs provide information to help you troubleshoot problems with the iPlanet Web Server and the directory server. To view the Webserver error log and directory server error log respectively, go to:

- `/opt/netscape/server4/https-<fully_qualified_hostname>/logs`
- `/opt/netscape/directory4/slapd-<hostname>/logs`

Postinstallation Tasks

If you chose to use SSL to communicate between the Portal Server gateway and server components, see Appendix A, “Generating and Installing SSL Certificates.”

Where To Go Next

To set up and manage Portal Server, start the Administration Console on the server component by opening a browser and going to the URL:

- `http://iPlanet_PortalServer_server:8080/console` and login as root or the name for the Super Admin that was specified during the installation (if you are not using SSL communication between the gateway and server components)
- `https://iPlanet_PortalServer_server:443/console` and login as root or the name for the Super Admin that was specified during the installation (if you are using SSL communication between the gateway and server components).

Refer to the *Portal Server Administration Guide*, located in

`/opt/SUNWips/public_html/docs/en_US/hardcopy_manuals/admin/admin.pdf` for information on administration or, from your browser, go to

`http://Portal_Server_server:8080/docs/en_US` or, if you are using SSL between the Portal Server gateway and the server components,

`https://PortalServer_server/docs/en_US`. If you changed the default port numbers during installation, substitute the new port numbers in the path.

Removing iPlanet Portal Server Software

You can remove Portal Server software by running the `ipsinstall` script, which removes packages added during installation.

Removal Procedure for the Portal Server Software

When you remove the Portal Server software from the gateway, the script stores the gateway certificate's `rp.CAstore` in `/var/tmp/rp.CAstore.<processnumber>` and stores the `rp.keystore` certificates in the file `/var/tmp/rp.keystore.<processnumber>`.

When you remove the Portal Server software from the server component, the script stores `/opt/netscape/server4/alias` in the directory `/var/tmp/alias.<processnumber>`.

CAUTION When you remove the Portal Server software, any S/Key information you generated is removed. Templates in the `/etc/opt/SUNWips` directory that you may have modified to customize the desktop are removed. If you customized any `.html` files shipped on the CD-ROM, you should save the modified files before removing the product or your changes will be lost.

To remove Portal Server software on the gateway component or on the server component

1. As root, mount the CD-ROM labeled “iPlanet Portal Server” on the machine from which you want to remove the software.

```
# volcheck
```

2. Run the `ipsinstall` script on the Portal Server gateway or on the server component of the Portal Server software.

```
# cd /cdrom/cdrom0
# ./ipsinstall
```

The installation script then displays the Portal Server license agreement:

```
*****
Welcome to the iPlanet Portal Server Installer (domestic release)
*****
The software bits for the iPlanet Portal Server product will
run without a license. However, you must have purchased
a license from Sun Microsystems to use this product.

Do you accept? [y]/n
```

3. Press Return (or **y**) to accept the license agreement and continue with the installation.

- At this point, the installation script checks to verify that the JDK version 1.2.2 is installed on your computer; if an earlier version is installed, or if no version is installed, the installation script asks whether you want to install JDK 1.2.2 and provides the option to re-link the Java installation directory to Java 1.2. You must have JDK 1.2.2 installed to use Portal Server 3.0 software.
- The installation script checks for required JDK 1.2.2 patches. See Table 1-1 on page 14 in Chapter 1 for required patches.
- The installation script checks for previously installed Portal Server packages--Portal Server software version 2.0.x or 3.0.

If the script detects previously installed Portal Server software packages, the installation script displays the following menu:

```
1) Back up existing product, remove, and continue
2) Remove existing product, then continue
3) Continue without removing existing product
4) Exit install
```

4. Choose the menu option for removing the product.

The script displays the following menu:

```
1) Server
2) Gateway
3) All
4) Continue with installation
5) Quit
```

When the software packages have been removed, the installation menu is displayed.

5. Type 3 to exit the installation.

6. Eject the CD-ROM.

(Any process started when the current working directory is `/cdrom/cdrom0` must be stopped before you can eject the CD-ROM.)

```
# cd /  
# eject cdrom0
```

If the Portal Server gateway contained the basic firewall application, you should reboot the gateway after removing the software.

```
# init 6
```


Generating and Installing SSL Certificates

This appendix provides information on SSL certificates. An SSL certificate provides encryption and decryption capabilities using a public and private key pair.

Certificate Generation Procedures

The gateway component and the server component of the Portal Server product install certificates differently.

- The gateway component of the Portal Server product supports self-signed certificates or certificates purchased from a certificate authority. Self-signed certificates and web certificates purchased from certificate authority vendors are stored in the `rp.keystore` file; root certificates purchased from certificate authority vendors are stored in the `rp.CAstore` file. (These files are stored in the `/etc/opt/SUNWips` directory.)
- The server component of the Portal Server product handles certificate installation through the iPlanet Web Server administration console.

Generate a certificate for each server component and gateway component between which you want to use SSL communication. To generate certificates for each component respectively, see “To generate a self-signed certificate for the gateway component of the Portal Server product,” on page 74 and “To generate a certificate for the server component of the Portal Server product,” on page 75.

To generate a self-signed certificate for the gateway component of the Portal Server product

During the installation of the gateway component of the Portal Server product, you created and installed a self-signed SSL certificate. At some point after installation, you might want to generate a new self-signed certificate for the gateway component; you might want to change the information for the certificate you entered during the original installation, for example.

1. As root, run the `certadmin` script on the gateway component of the Portal Server product.

```
# /opt/SUNWips/bin/certadmin
```

The Certificate Administration menu is displayed:

```
1) Generate Self-Signed Certificate
2) Generate Certificate Signing Request (CSR)
3) Add Root CA Certificate
4) Install Certificate from Certificate Authority (CA)
5) List Root CA certificates
6) Quit
choice: [6]
```

2. Type 1 on the Certificate Administration menu to generate a self-signed certificate.

The Certificate Administration script prompts you to type certain organization-specific information and a passphrase for the self-signed certificate:

```
What is the fully qualified DNS name of this host?
[hostname.domainname]
What is the name of your organization? []
What is the name of your organizational unit? []
What is the name of your City or Locality? []
What is the name of your State or Province? []
What is the two-letter country code for this unit? []
...
Enter passphrase []
```

3. Type your organization-specific information and a passphrase for the self-signed certificate.

A self-signed certificate is generated and your prompt returns.

4. Restart the gateway component for the certificate to take effect.

```
# /opt/SUNWips/bin/ipsgateway stop
# /opt/SUNWips/bin/ipsgateway start
```

To generate a certificate for the server component of the Portal Server product

1. Go to the iPlanet Web Server administration console by entering the URL `http://<iPlanet Portal Server_server>:8888`. If a different Admin Server port number was specified during the server component's installation, use that port number to access the iPlanet Web Server administration console instead of 8888.
2. When the popup window appears, type the admin name and admin password you chose during installation.

3. In the window that then appears, click the Manage button in the frame on the right.

At this point, the system may warn you that the configuration has been manually edited and the resulting changes have not been loaded. If so, dismiss the warning window and click the Apply button in the upper right corner of the screen. If you are asked to undo the changes, choose to undo them and click Apply again. Then choose Load configuration files. A popup window appears indicating that operation was successful. Click OK to dismiss this window.

NOTE	If presented with a choice, always choose to load the configuration files. If you somehow save the current setup when none has been loaded (because the system does not load manual edits), you will overwrite the web server configuration, thus requiring that you reinstall the Portal Server platform software. Read all the dialog boxes and be sure to choose to load the configuration files.
-------------	--

4. Select the Security tab. The “Create a Trust Database” screen appears.
5. Type a database password (twice) and click OK to create the database.

A popup window appears indicating that operation was successful. Click OK to dismiss this window.
6. On the navigation bar on the left side of the screen, select “Request a certificate.”
7. Type your email address in the “CA email address” field.
8. In the Key Pair File Password field, type the administration password you entered when you were configuring the Portal Server product.
9. Type your name and telephone number and other data requested. In the Common Name field, type the fully qualified name of the server component (such as gateway1.eng.sun.com).

10. Click the OK button to generate a certificate signing request (CSR).

At this point, the right frame contains your CSR. The CSR will also be mailed to the address you entered. You will need this CSR to request a certificate from the Certificate Authority (CA) you choose.

The iPlanet Web Server product has server CAs for most of the major vendors. You can view the installed server CAs, as well as any server certificates you have installed, by clicking on the Manage Certificates option in the navigation frame.

11. Once you have received the certificate from the CA, click the Install Certificate button in the navigation frame

The certificate begins with a line that reads:

```
-----BEGIN CERTIFICATE-----
```

continues with the certificate itself, and ends with a line that reads:

```
-----END CERTIFICATE-----
```

Make sure you include both of these lines with the certificate in the file.

12. In the Key Pair File Password field, type your SSL passphrase.
13. If you have saved your certificate in a file, type the file name in the Message in This File: field, or select the Message Text button and paste the text in the text area.
14. Click the OK button to install the certificate.
15. When asked to confirm the addition of this certificate, click on the Add Server Certificate button.

Optionally, click Manage Certificates and verify that your certificate has been installed.
16. Dismiss the resulting popup window indicating the success of this operation.
17. Click the OK button to dismiss the warning window.

For now, ignore the warning about stopping and starting the server.
18. Click the Preferences tab.
19. Click the Encryption On/Off option in the navigation frame on the left.
20. Type the port number of the server component in the Port Number field.

NOTE The port number is 443 unless you chose another port number during the installation of the server component.

21. Click the On button.
22. If a popup window asking for the server password appears, type anything for the password.
23. Click the OK button to enable encryption on the web server.
24. Ignore the warning about stopping and restarting the server.
The changes to the configuration are saved, but the server will not be restarted. The server need not be restarted here.
25. When you see a message confirming the changes to the configuration files, choose the Save and Apply option.

CAUTION At this point you see a message asking you to restart the web server. Do not restart from the administration console. Instead, use the following instructions to start the web server.

26. Go to a terminal window and type:

```
/etc/init.d/ipsserver start [debug]
```

Include the optional `debug` argument to confirm that the platform server is not running. This allows you to see two messages from the iPlanet Web Server product, one confirming the startup of the administration console and the other confirming startup of the web server.

27. Verify that the port is correct and that it is running on a URL that starts `https://....` You will see an error message if the port number or URL is incorrect.

SSL Certificates from Vendors (gateway component of the Portal Server product)

During the installation of the gateway component of the Portal Server product, you created and installed a self-signed SSL certificate. At any point after installation, you have the option to install SSL certificates signed by vendors who provide official certificate authority (CA) services. A certificate from a CA vendor is necessary for the server component of the Portal Server product if you are using SSL between the gateway component and the server component of the Portal Server product.

Portal Server software contains root certificates that can be used with SSL certificates from Verisign, Inc. If you decide to install an SSL certificate from a vendor other than Verisign, you must install a root certificate from that vendor first, and then install the web server certificate.

Certificates are stored in the `rp.keystore` file. Once you generate a certificate signing request (used to request a certificate from a third-party vendor), make sure you keep a backup copy of the `rp.keystore` file. This file contains your private key, which is associated with the certificate that you purchase; if you lose the file, you will not be able to use the certificate that you bought.

To install SSL certificates from Verisign (gateway component of the Portal Server product)

1. As root, run the `certadmin` script on the gateway component of the Portal Server product.

```
# /opt/SUNWips/bin/certadmin
```

The Certificate Administration menu is displayed:

```
1) Generate Self-Signed Certificate
2) Generate Certificate Signing Request (CSR)
3) Add Root CA Certificate
4) Install Certificate from Certificate Authority (CA)
5) List Root CA certificates
6) Quit
choice: [6]
```

2. Type **2** on the Certificate Administration menu to generate a certificate signing request (CSR).
 - If no self-signed certificate exists on this machine, the Certificate Administration script notifies you that you must create one. Refer to the procedure, “To generate a self-signed certificate for the gateway component of the Portal Server product,” on page 74.
 - If a self-signed certificate exists on this machine, the information from the certificate is displayed. The Certificate Administration script asks the question:

```
Is this information correct (y/n)? [n]
```

- a. Type **y** if the information is correct or type **n** if it is not correct.
 - If you type **n**, you are asked to type information for a new self-signed certificate. Refer to the procedure, “To generate a self-signed certificate for the gateway component of the Portal Server product,” on page 74.
 - If you type **y**, the Certificate Administration script asks you to enter various organization-specific information:

```
What is the name of the admin/webmaster for this server? []
What is the email address of the admin/webmaster for this server?
[]
What is the phone number of the admin/webmaster for this server?
[]
```


- b. Type your organization-specific information.

The Certificate Administration script displays the values you enter and asks the question:

```
Are these values correct (y/n)? [n]
```

- c. Type **y** if the information is correct or type **n** if it is not correct.
 - o If you type **y**, a CSR is generated and stored in the file `/tmp/csr.<hostname>`.
 - o If you type **n**, the Certificate Administration script asks you to enter the values again.
- 3. Go to the Certificate Authority's website and order your web server certificate.
 - a. Provide information from your CSR, as requested by the CA.
 - b. Provide other information, as requested by the CA, such as a passphrase.
- 4. After you receive your certificate from the CA, save it in a file.

The certificate begins with a line that reads:

```
-----BEGIN CERTIFICATE-----
```

continues with the certificate itself, and ends with a line that reads:

```
-----END CERTIFICATE-----
```

Make sure you include both of these lines with the certificate in the file.

- 5. As root, run the `certadmin` script on the gateway component of the Portal Server product.

```
# /opt/SUNWips/bin/certadmin
```

The Certificate Administration menu is displayed:

```
1) Generate Self-Signed Certificate
2) Generate Certificate Signing Request (CSR)
3) Add Root CA Certificate
4) Install Certificate from Certificate Authority (CA)
5) List Root CA certificates
6) Quit
choice: [6]
```

6. Type 4 on the Certificate Administration menu to install your certificate from the CA.

The Certificate Administration script asks the question:

```
What is the name (including path) of the file that contains the
certificate? []
```

7. Type the full path to the file containing the certificate.

Your certificate is stored in the `rp.keystore` file and your prompt returns.

8. Restart the gateway component for the certificate to take effect.

```
# /opt/SUNWips/bin/ipsgateway stop
# /opt/SUNWips/bin/ipsgateway start
```

9. Make a backup copy of the `rp.keystore` file.

To install SSL root certificates and SSL certificates from other vendors (gateway component of the Portal Server product)

You must have already generated a self-signed certificate to install a root certificate.

1. Go to the Certificate Authority's website and download its root certificate.
The website should contain instructions for downloading the certificate, usually as a file.
2. As root, run the `certadmin` script on the gateway component of the Portal Server product.

```
# /opt/SUNWips/bin/certadmin
```

The Certificate Administration menu is displayed:

```
1) Generate Self-Signed Certificate
2) Generate Certificate Signing Request (CSR)
3) Add Root CA Certificate
4) Install Certificate from Certificate Authority (CA)
5) List Root CA certificates
6) Quit
choice: [6]
```

3. Type 3 on the Certificate Administration menu to add a root certificate.

The Certificate Administration script asks the question:

```
What is the name (including path) of the file that contains the
root certificate that you would like to add to your database? []
```

- a. Type the full path to the file containing the root certificate.

The file is displayed and the Certificate Administration script asks the question:

```
Is this information correct (y/n)? [n]
```

- b. Type **y** if the file is correct, or **n** if it is not.
 - o If you type **y**, the root certificate is stored in the `rp.CAstore` file and your prompt returns.
 - o If you type **n**, the root certificate is not added and your prompt returns.
4. As root, run the `certadmin` script on the gateway component of the Portal Server product.

```
# /opt/SUNWips/bin/certadmin
```

5. Type **2** on the Certificate Administration menu to generate a certificate signing request (CSR).
 - If no self-signed certificate exists on this machine, the Certificate Administration script notifies you that you must create one. Refer to the procedure, “To generate a self-signed certificate for the gateway component of the Portal Server product,” on page 74.
 - If a self-signed certificate exists on this machine, the information from the certificate is displayed. The Certificate Administration script asks the question:

```
Is this information correct (y/n)? [n]
```

- a. Type **y** if the information is correct or type **n** if it is not correct.

- If you type **n**, you are asked to type information for a new self-signed certificate. Refer to the procedure, “To generate a self-signed certificate for the gateway component of the Portal Server product” earlier in this chapter.
- If you type **y**, the Certificate Administration script asks you to type various organization-specific information:

```
What is the name of the admin/webmaster for this server? []
What is the email address of the admin/webmaster for this server?
[]
What is the phone number of the admin/webmaster for this server?
[]
```

b. Type your organization-specific information.

The Certificate Administration script displays the values you type and asks the question:

```
Are these values correct (y/n)? [n]
```

- c. Type **y** if the information is correct or type **n** if it is not correct.**
 - If you type **y**, a CSR is generated and stored in the file `/tmp/csr.<hostname>`.
 - If you type **n**, the Certificate Administration script asks you to type the values again.
- 6. Return to the Certificate Authority’s website and order your web server certificate.**
- a. Provide information from your CSR, as requested by the CA.**
 - b. Provide other information, as requested by the CA, such as a passphrase.**
- 7. After you receive your certificate from the CA, save it in a file.**

The certificate begins with a line that reads:

```
-----BEGIN CERTIFICATE-----
```

continues with the certificate itself, and ends with a line that reads:

```
-----END CERTIFICATE-----
```

Make sure you include both of these lines with the certificate in the file.

8. As root, run the `certadmin` script on the gateway component.

```
# /opt/SUNWips/bin/certadmin
```

The Certificate Administration menu is displayed:

```
1) Generate Self-Signed Certificate
2) Generate Certificate Signing Request (CSR)
3) Add Root CA Certificate
4) Install Certificate from Certificate Authority (CA)
5) List Root CA certificates
6) Quit
choice: [6]
```

9. Type **4** on the Certificate Administration menu to install your certificate from the CA.

The Certificate Administration script asks the question:

```
What is the name (including path) of the file that contains the
certificate? []
```

10. Type the full path to the file containing the certificate.

Your certificate is stored in the `rp.keystore` file and your prompt returns.

11. Restart the gateway component, for the certificate to take effect.

To restart the gateway component:

```
# /opt/SUNWips/bin/ipsgateway stop  
# /opt/SUNWwips/bin/ipsgateway start
```

12. Make a backup copy of the `rp.keystore` file.

Installing Third-Party Software

This appendix provides information on using third-party software with iPlanet Portal Server software.

Software on the CD-ROM

The Portal Server CD-ROM labeled “Contains 3rd Party Software Packages Only” contains several third-party products.

Samba Software

If you want to allow remote users access to Microsoft Windows networks, you must install Samba server software on the server component of the Portal Server product.

To install Samba software

1. As root, mount the CD labeled “Contains 3rd Party Software Packages Only” on the server component of the Portal Server product.

```
# volcheck
```

2. Run the `install_3ps` script.

```
# cd /cdrom/cdrom0
# ./install_3ps
```

This adds the package SUNWwtsmb to the server component of the Portal Server product.

The installation script displays a disclaimer.

3. Type **yes** to accept the disclaimer.
4. Eject the CD-ROM.

(Any process started when the current working directory is /cdrom/cdrom0 must be stopped before you can eject the CD-ROM.)

```
# cd /
# eject cdrom0
```

Other Software on the CD-ROM

Other software contained on the CD labeled “Contains 3rd Party Software Packages Only” includes GO-Joe and pcANYWHERE. These packages and files are installed on machines other than the Portal Server gateway or Portal Server Portal Server; refer to the *iPlanet Portal Server 3.0 Administration Guide* for installation instructions.

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