



Facility ePortal - Installation Guide

Version 1.7



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Table of Contents

1	Introduction	3
1.1	Prerequisites	3
2	Preparations	4
2.1	Copy the current 'eportal' folder within 'webapps'	4
2.2	Copy relevant files in the installation folder	5
2.3	Copy the 'API.xml' file	5
2.4	Backup assessment template grids.....	6
2.5	Download the ePortal release	7
2.6	Locate the data source file	8
2.7	'Server.xml' file and port numbers used for ePortal	9
2.8	Copy folder permissions.....	10
2.9	Obtain a copy of the ePortal licence key	10
3	Installation Process.....	11
4	Post installation.....	17
4.1	Licence key	17
4.2	Copying configuration '.xml' files back	19
4.3	Updating 'API.xml' file	19
4.4	Update 'server.xml' file	20
4.5	Copy back folder permissions	23
4.6	Creating VLE guest Account.....	23
5	Appendices	24
5.1	Upgrading to 14.2 from version 13.1 or earlier of ePortal	24
5.1.1	Stop the ePortal services	24
5.1.2	Stop Internet Information Services (IIS).....	24
5.1.3	Close any relevant applications.....	25
5.1.4	Uninstall ePortal	25
5.2	Single Sign On.....	27
5.2.1	Steps before uninstall.....	27
5.2.2	Steps after installation.....	29
5.3	Choosing a different installation folder for ePortal	30
5.4	VLE Guest account	32
5.5	Installation checklist.....	33

1 Introduction

This document guides you through the process of installing ePortal. It is assumed that the current version of ePortal is 14.1 and it is being upgraded to 14.2.

If the current version of ePortal is 13.1 or earlier and it is being upgraded to 14.2, please refer to Appendix 5.1. This requires ePortal to be uninstalled due to a change in the version of Tomcat used.

Please read through this document first and then if there are questions about the process, please contact the support desk.

If there are any post-upgrade issues, please see the 'Troubleshooting the ePortal Installation' document, which is available to download from the support site, [Firstline](#).

1.1 Prerequisites

Before proceeding, please ensure that:

- Facility has been upgraded to 14.2 and logged into once to validate the table structure.
- Administrator access to the ePortal server is available.

2 Preparations

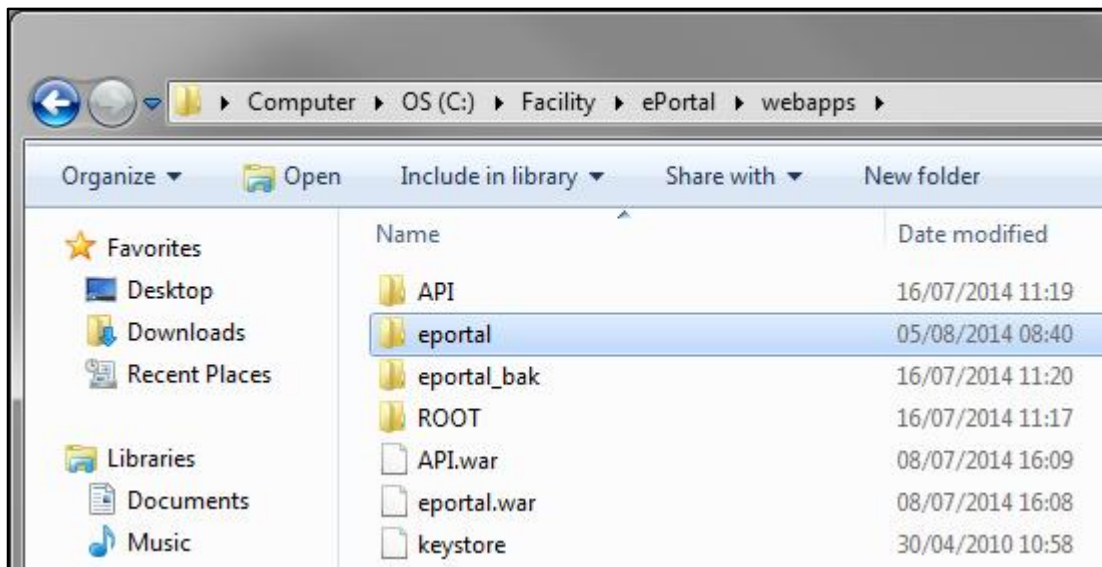
Facility ePortal should be installed immediately after the upgrade to Facility Administration. Under no circumstances should mismatching Facility applications and components be used.

Note: If the Single Sign On module is used, please refer to Appendix 5.2 Single Sign On.

2.1 Copy the current 'eportal' folder within 'webapps'

The purpose of making a copy this folder is to save the current configuration ('xml' files) and the staff and student photos, assuming these are stored in the folders 'images\StuPhotos' and 'images\StaffPhotos'.

1. Browse to the webapps folder where ePortal has been installed. This is usually:
[Drive]:\Facility\ePortal\webapps
2. Select the 'eportal' folder.



3. Right-click and select Copy.
4. Go to the folder you created for the backup.
5. Right-click and select Paste.

2.2 Copy relevant files in the installation folder

The 'Facility' folder which by default is located at the root of the drive is removed because of the uninstall.

Copy any relevant files that are within this folder. These may include:

- '.dsn' file
- '.CDB' file

2.3 Copy the 'API.xml' file

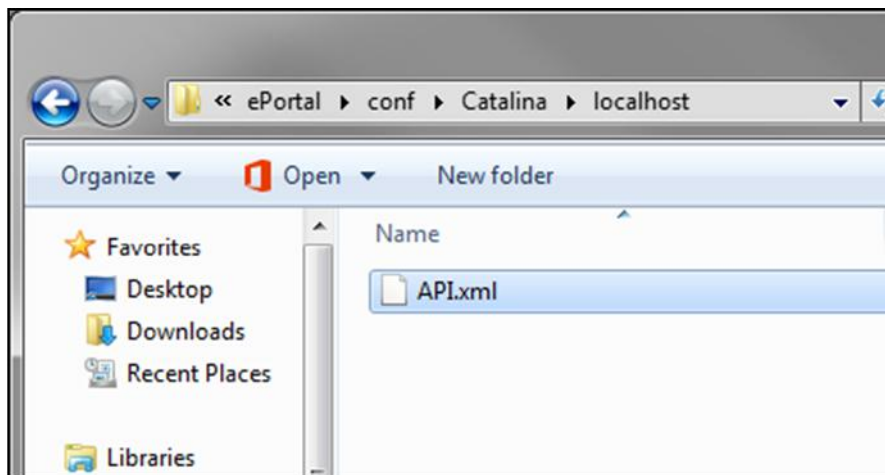
If the API is used, this file will need to be backed up as it provides access to the API.

Note: This file should not be copied into the new installation. The IP addresses should be manually entered into the new file with a pipe between each IP address rather than a comma because of the change to Tomcat 7.

1. Browse to the folder:

[Drive]:\Facility\ePortal\conf\Catalina\localhost

2. Select the 'API.xml' file.



3. Right-click and select Copy.
4. Go to the folder you created for the backup.
5. Right-click and select Paste.

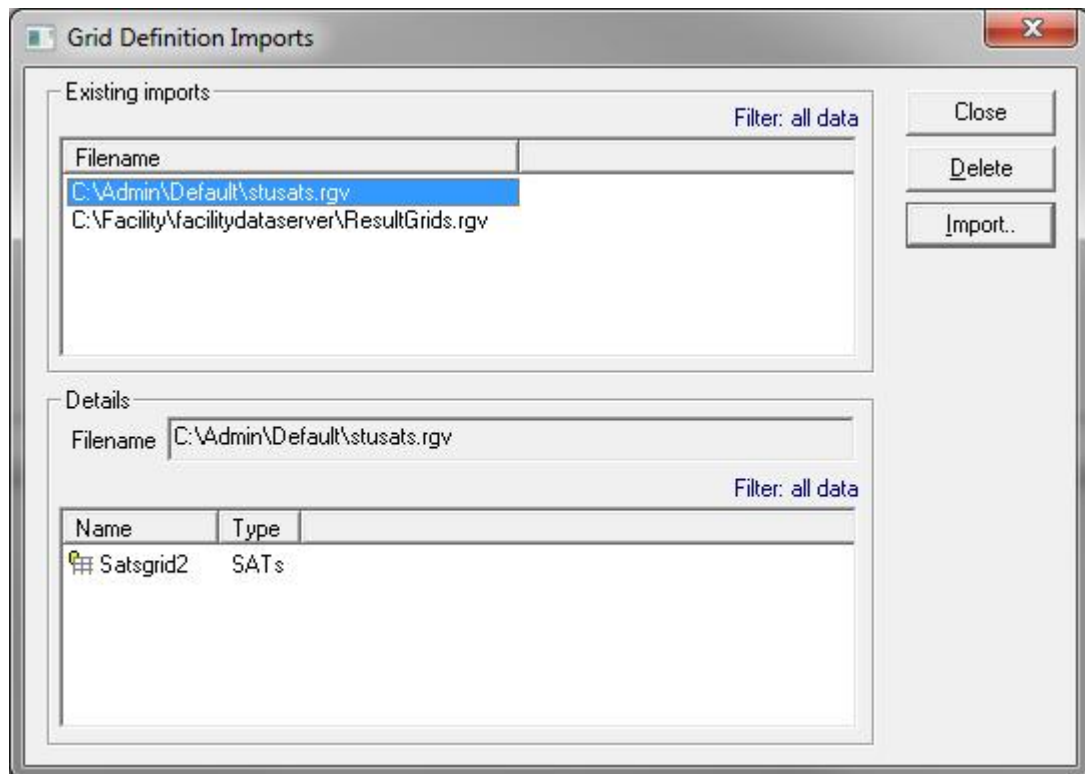
2.4 Backup assessment template grids

If custom grid designs are being used for the assessment templates, these grids will need to be backed up.

1. Open Facility Controller.
2. Go to Server | Grid definitions... The 'Grid Definitions Imports' window appears.

In the 'Existing imports' list window, the 'C:\Facility\facilitydataserver\ResultsGrids.rgv' file contains the default grids and does not need to be copied.

3. Browse to the location of any other items in the 'Filename' column.



4. Select the grid file, right-click and select Copy.
5. Go to the folder you created for the backup.
6. Right-click and select Paste.
7. Repeat steps 3 to 6 for each 'Filename' other than the one for the default grids.

2.5 Download the ePortal release

1. Log into www.advancedfirstline.com.
2. Select Service Desk.
3. From the menu on the left, select Releases.
4. Follow the links to download the ePortal install file.
5. Save it to a location on the server.
6. Once the file is downloaded, extract/unzip the contents.
7. Note down the location.

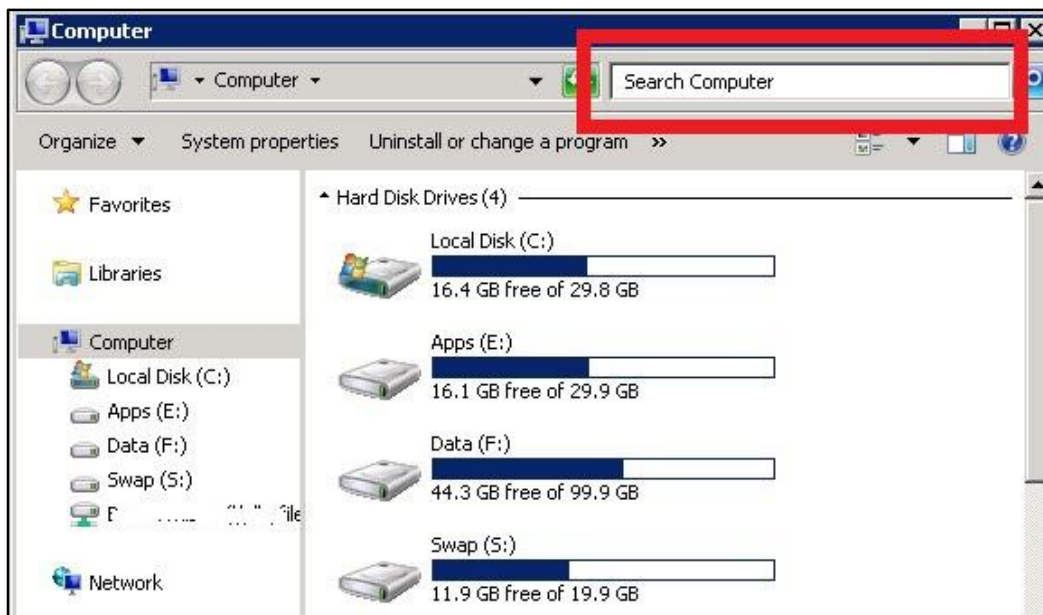


2.6 Locate the data source file

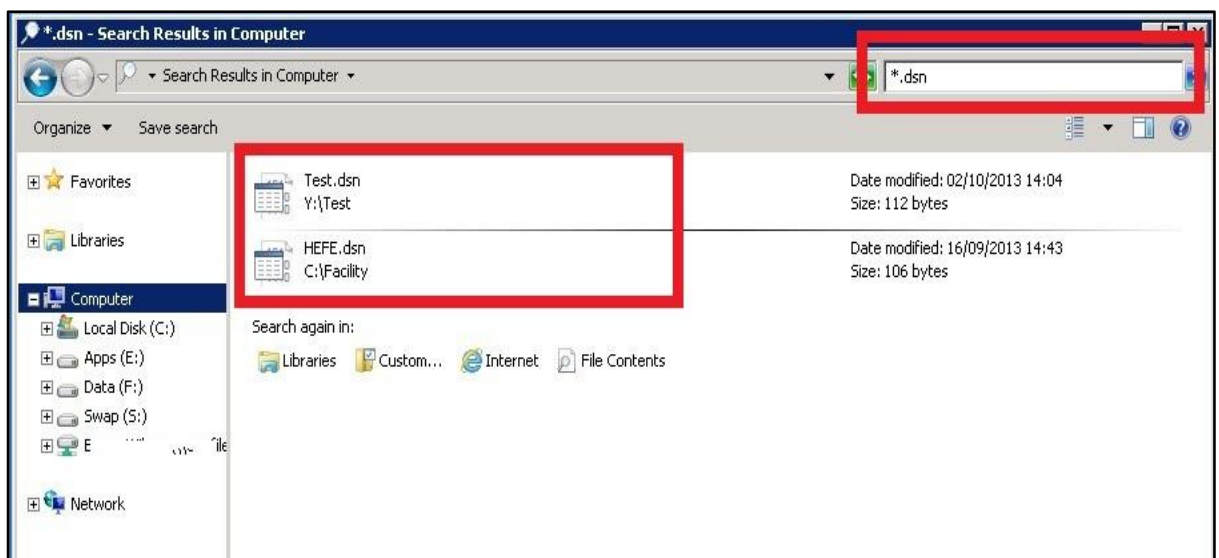
ePortal uses a data source file (‘.dsn’) to connect to the SQL database which will be stored on the server in a particular location. It is recommended to place this in a central location that remains unaffected by the upgrade.

If this location is not known, it can be found by:

1. Go to Start | Computer. Windows Explorer appears.
2. In the ‘Search Computer’ field, top right, type ‘*.dsn’.



A search will start for the file type and a list of the results will be displayed.



3. Note the file name and location for future reference.

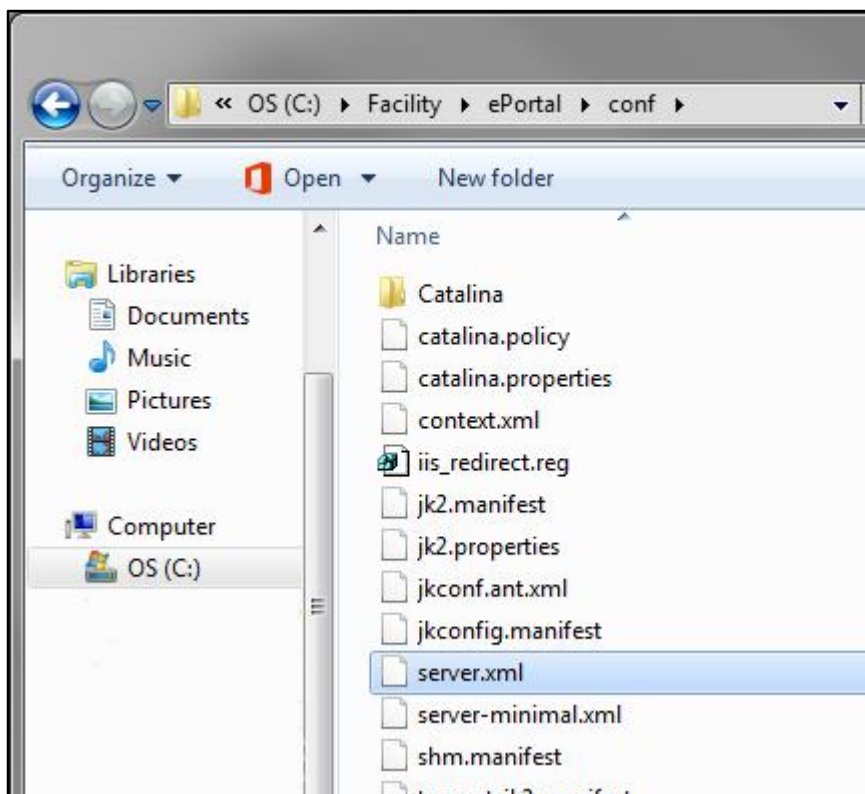
2.7 'Server.xml' file and port numbers used for ePortal

By default ePortal will use the port number '8080' for 'http' and '8443' for 'https'. If conflicts exist on the server, these may have been changed. To ensure that this will not cause an issue post install, it is recommend to note down these port numbers.

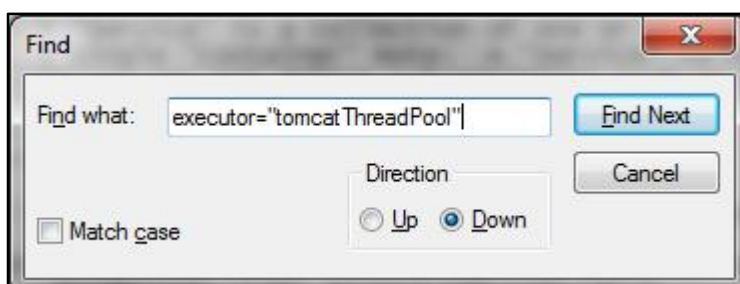
1. Browse to the following folder:

[Drive]:\Facility\ePortal\conf

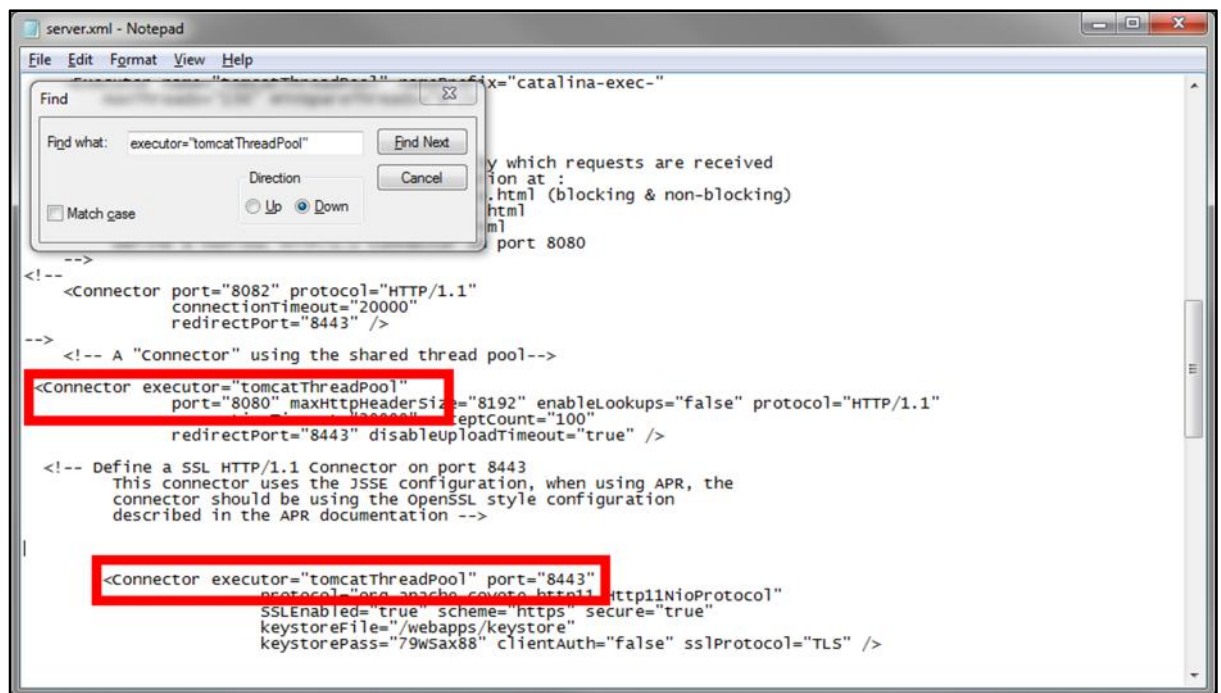
2. Select the 'server.xml' file.
3. Right-click and select Edit. The file will open in Notepad, or you can use a similar text editor.



4. Go to Edit | Find. The 'Find' window is displayed.
5. In the 'Find what:' text box, type in 'executor="tomcatThreadPool"'.



6. Click Find Next. The first result will be highlighted.
7. Scroll down to see the next item.



8. The two port numbers are highlighted. Note these down if they are different to the default values.
9. Close the file.

2.8 Copy folder permissions

To avoid problems after the install, the permissions for the following folders need to be noted down and saved in a Notepad file and added to the backup folder.

- Facility\ePortal\bin
- Facility\ePortal\conf
- Facility\ePortal\logs
- Facility\ePortal\webapps\eportal

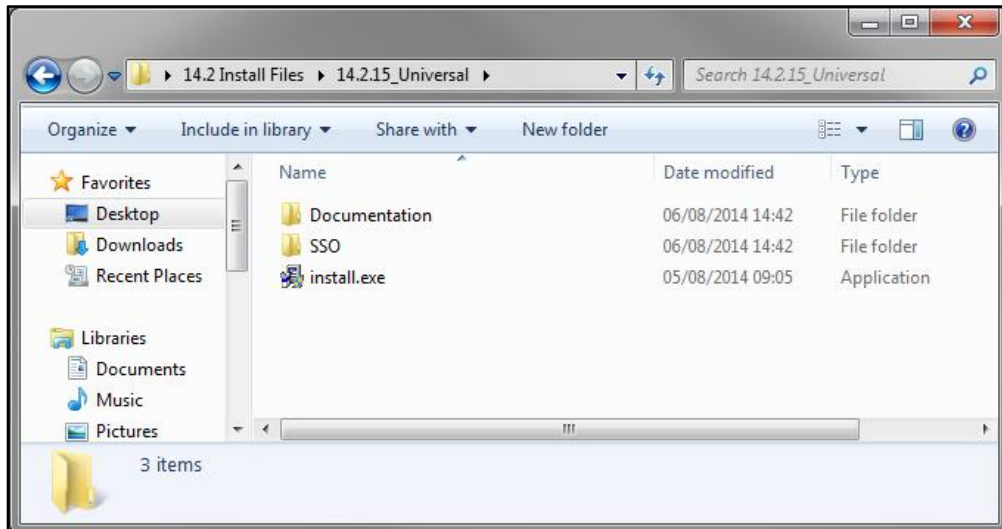
2.9 Obtain a copy of the ePortal licence key

An licence key is required for the install of the new version of ePortal. The school will usually have the key recorded in a secure location. If the key is not available, please contact support.

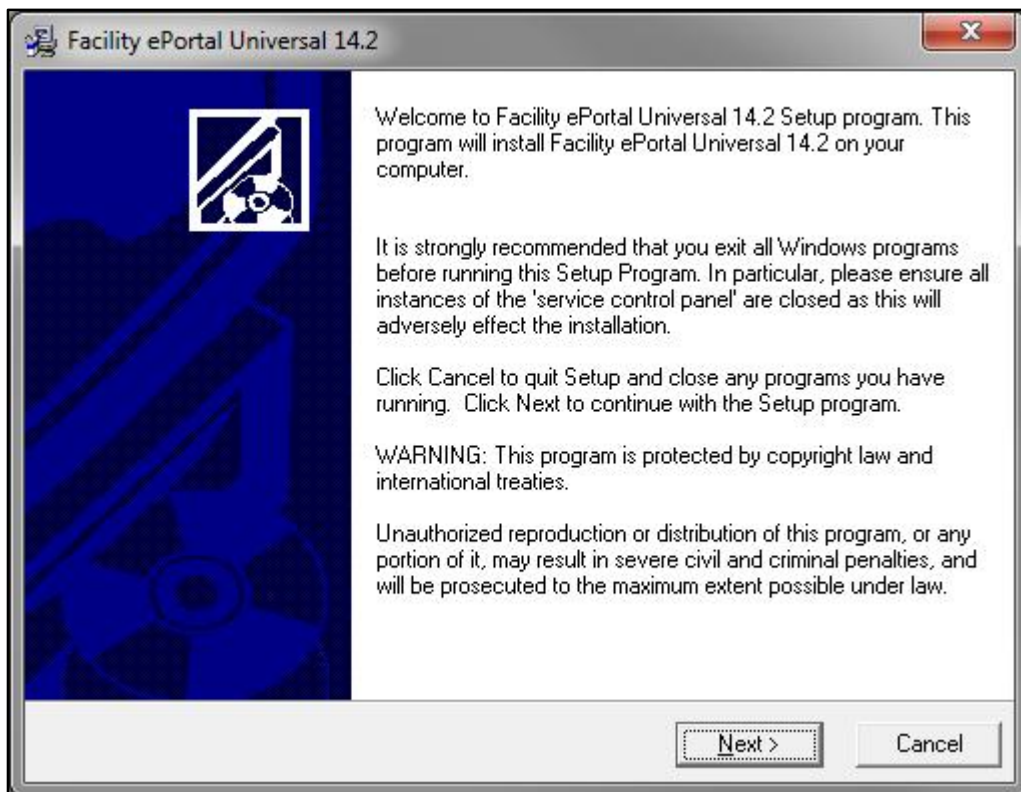
3 Installation Process

After ensuring that the steps documented in the previous sections are carried out, the new version of ePortal can be installed.

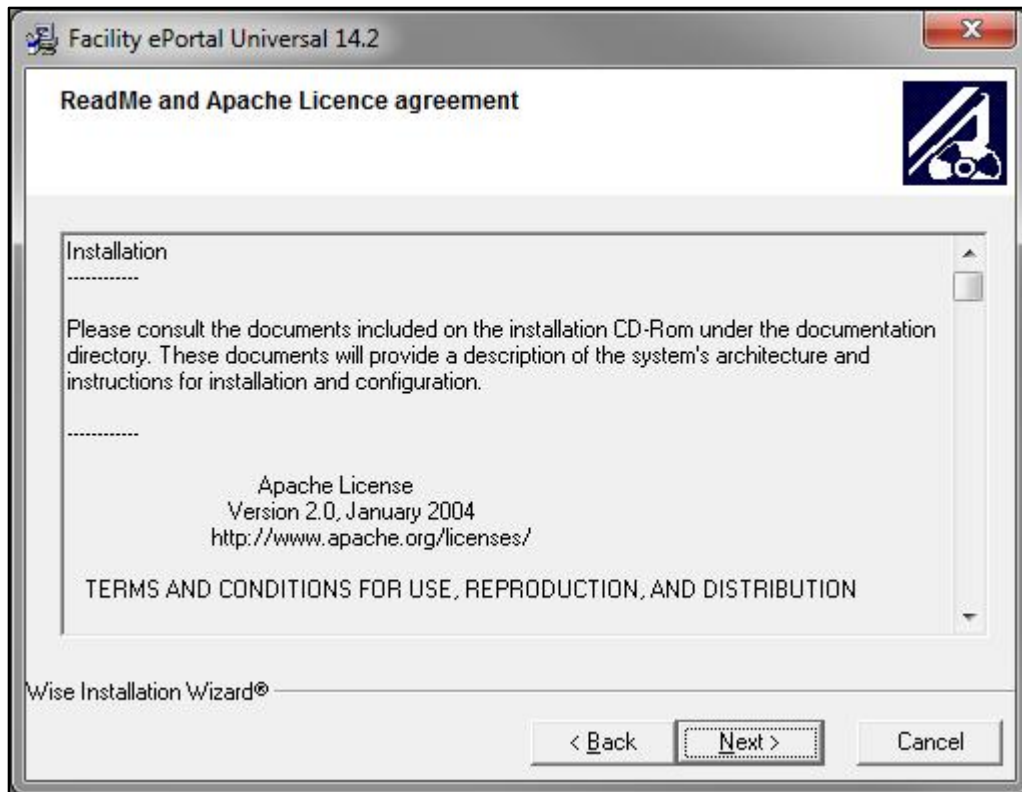
1. Browse to where the install files were extracted/unzipped in section 2.5.



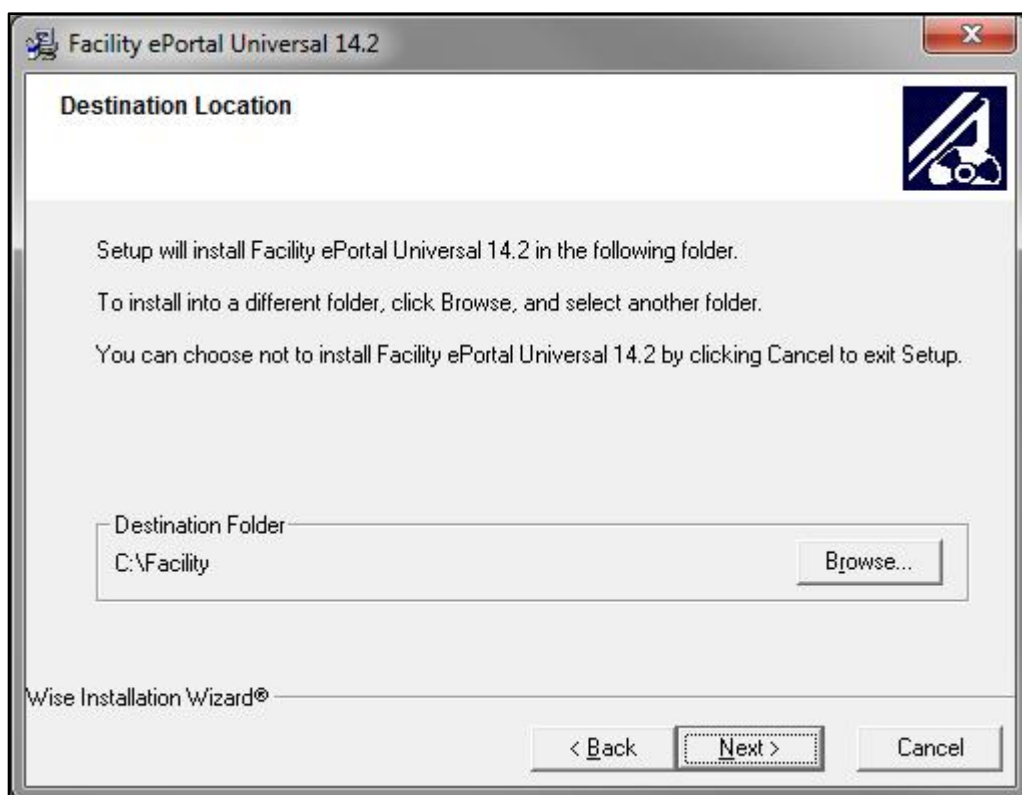
2. Double-click the 'install.exe' file. The 'Facility ePortal 14.2. Installation' window appears. Once this has finished processing, the 'Facility ePortal 14.2' window appears.



3. Click Next. The 'ReadMe and Apache Licence agreement' page appears.

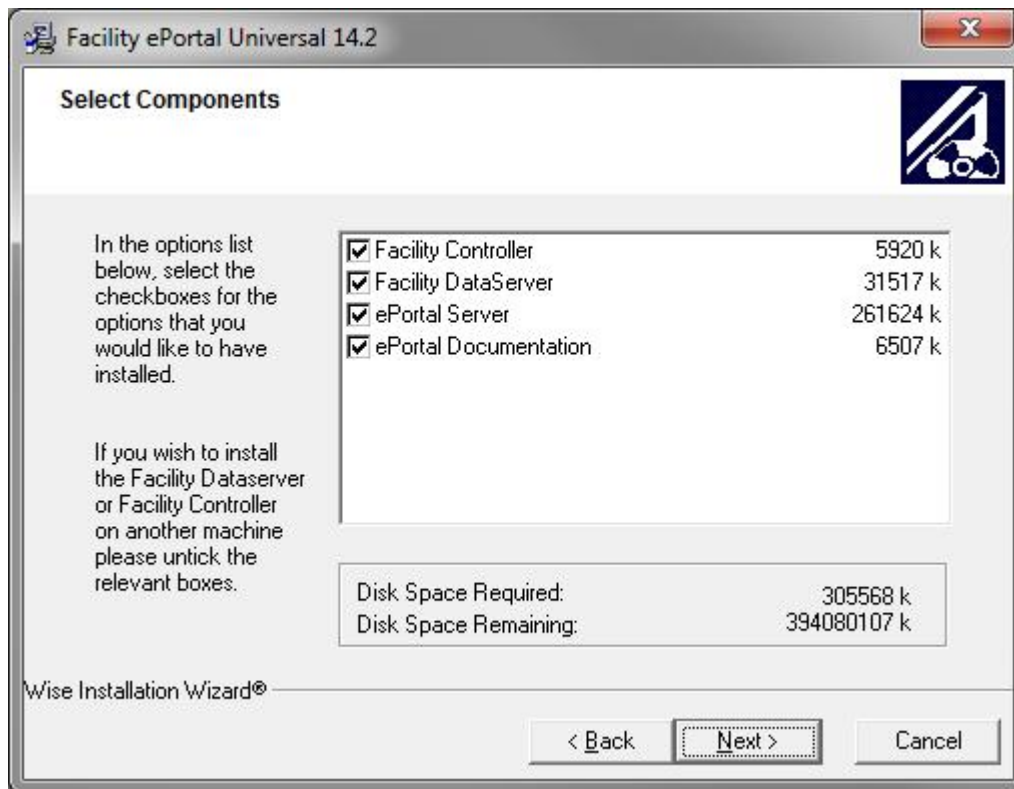


4. Click Next. The 'Destination Location' window appears.

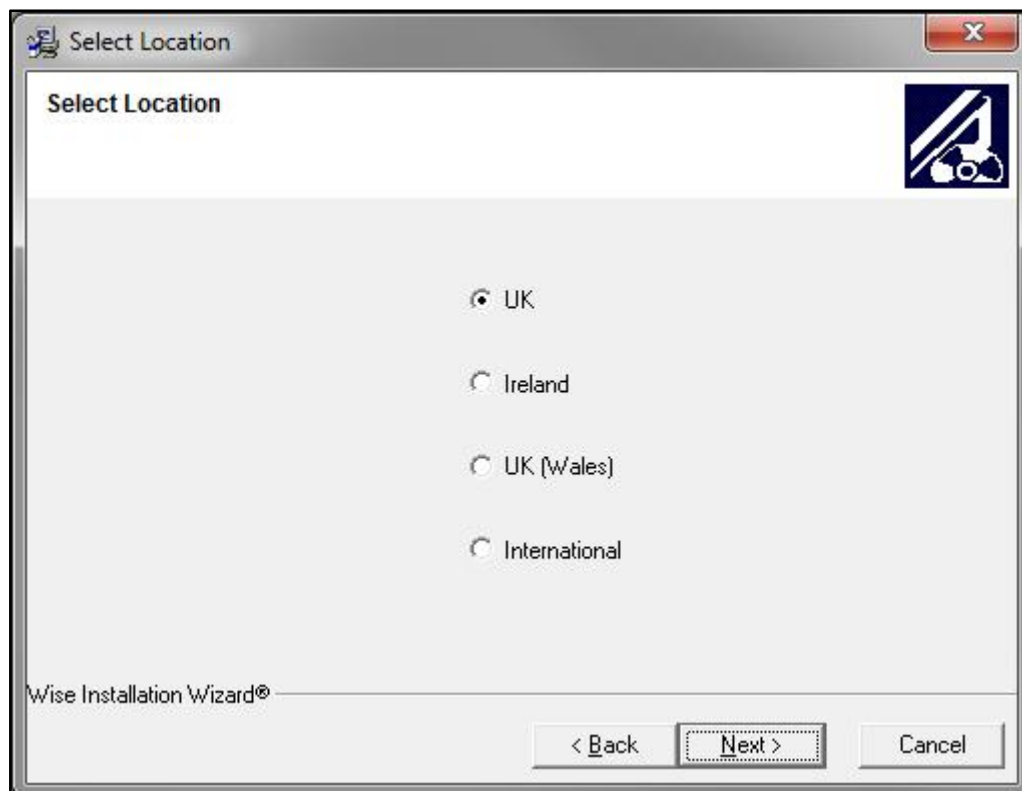


5. Check the 'Destination Folder' location. To accept the default location, click Next. If this needs to be changed, please see appendix 5.3.

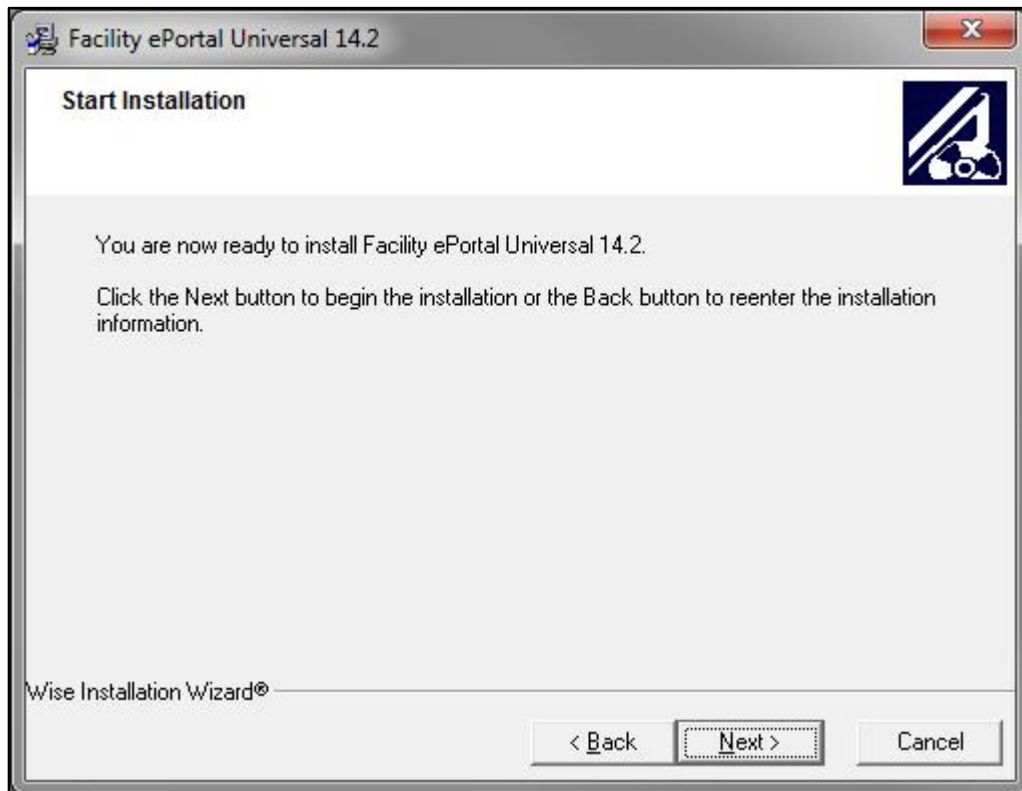
6. Click Next. The 'Select Components' window appears.



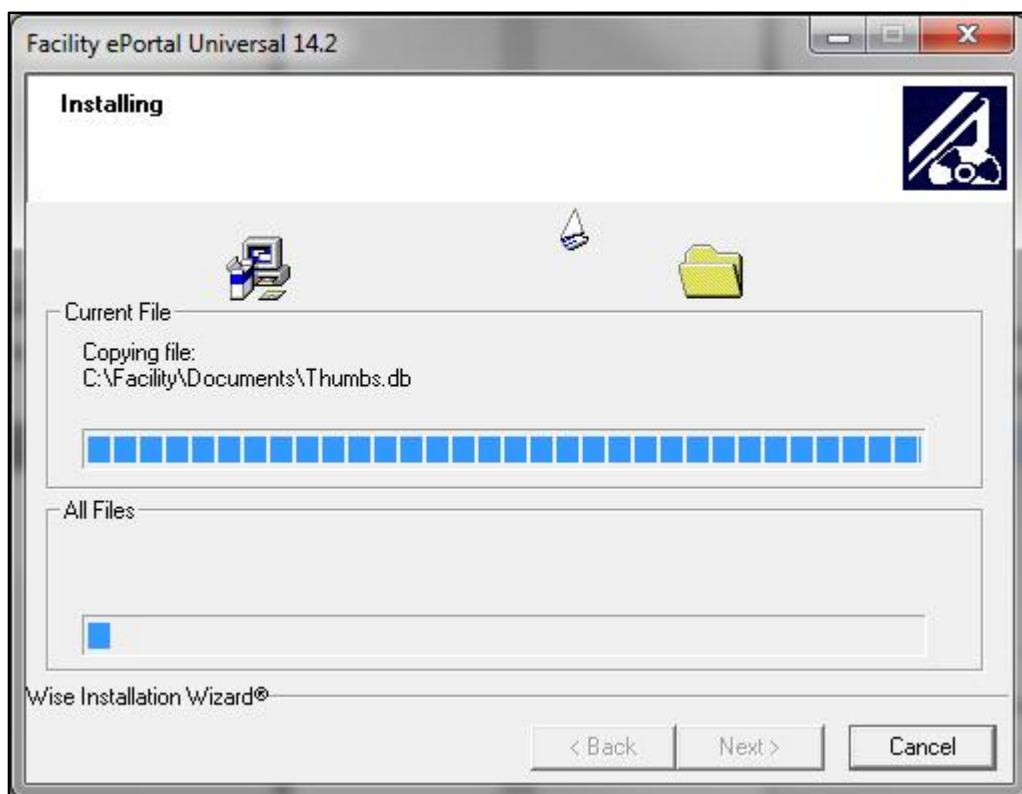
7. Leave the check boxes selected for all four components and click Next. The 'Select Location' window appears.



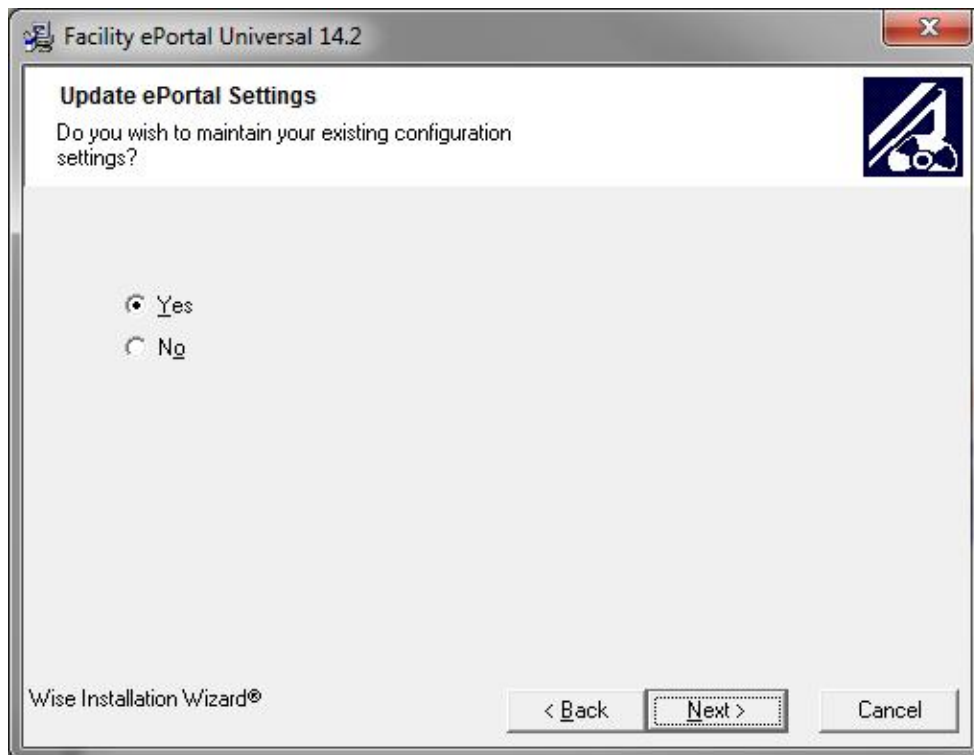
8. Select the relevant location and click Next. The 'Start Installation' window appears.



9. Click Next. The install process begins and progress is indicated.

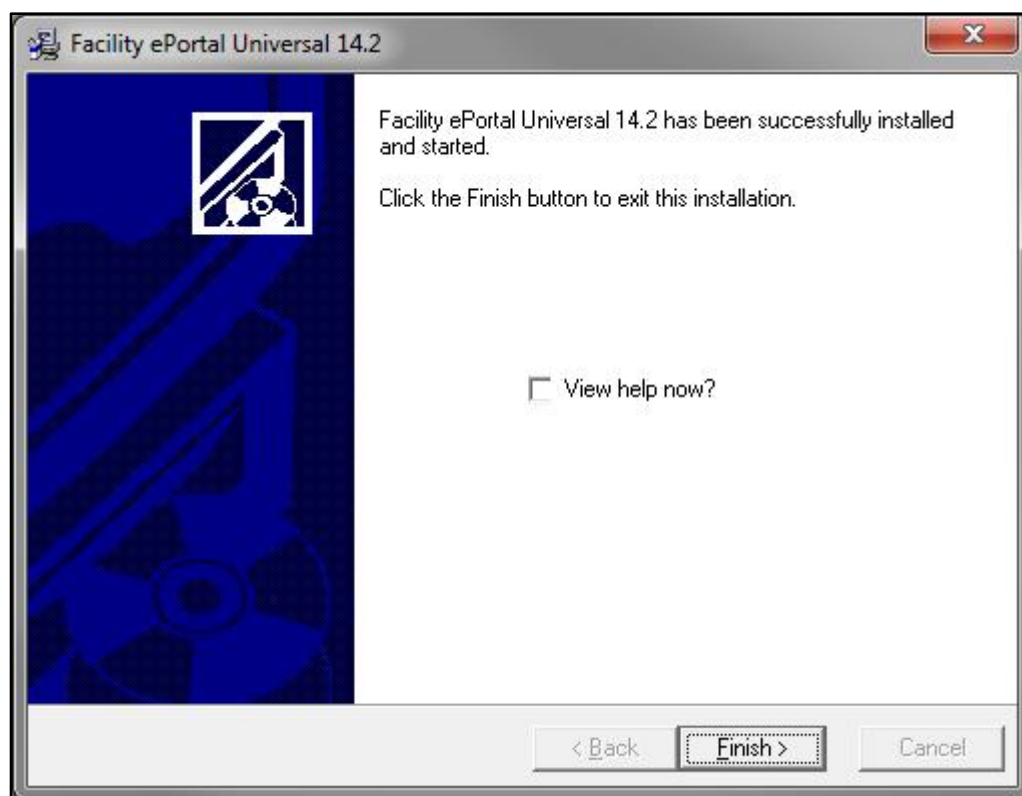


Once this has finished processing, the 'Update ePortal Settings' window appears.

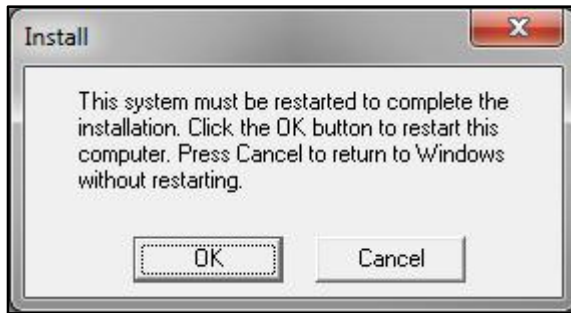


10. Select 'Yes' to keep the configuration files from version 14.1.

11. Click Next. The 'Facility ePortal 14.2' window appears.



12. Click Finish. An 'Install' dialog appears.



13. The system must be restarted after installing ePortal. Click OK.

14. The system will restart.

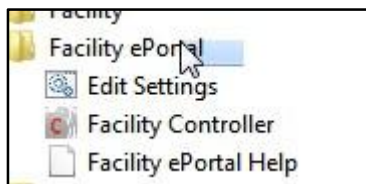
4 Post installation

Once the installation of ePortal has completed and the system has been restarted, there are several things that need to be updated.

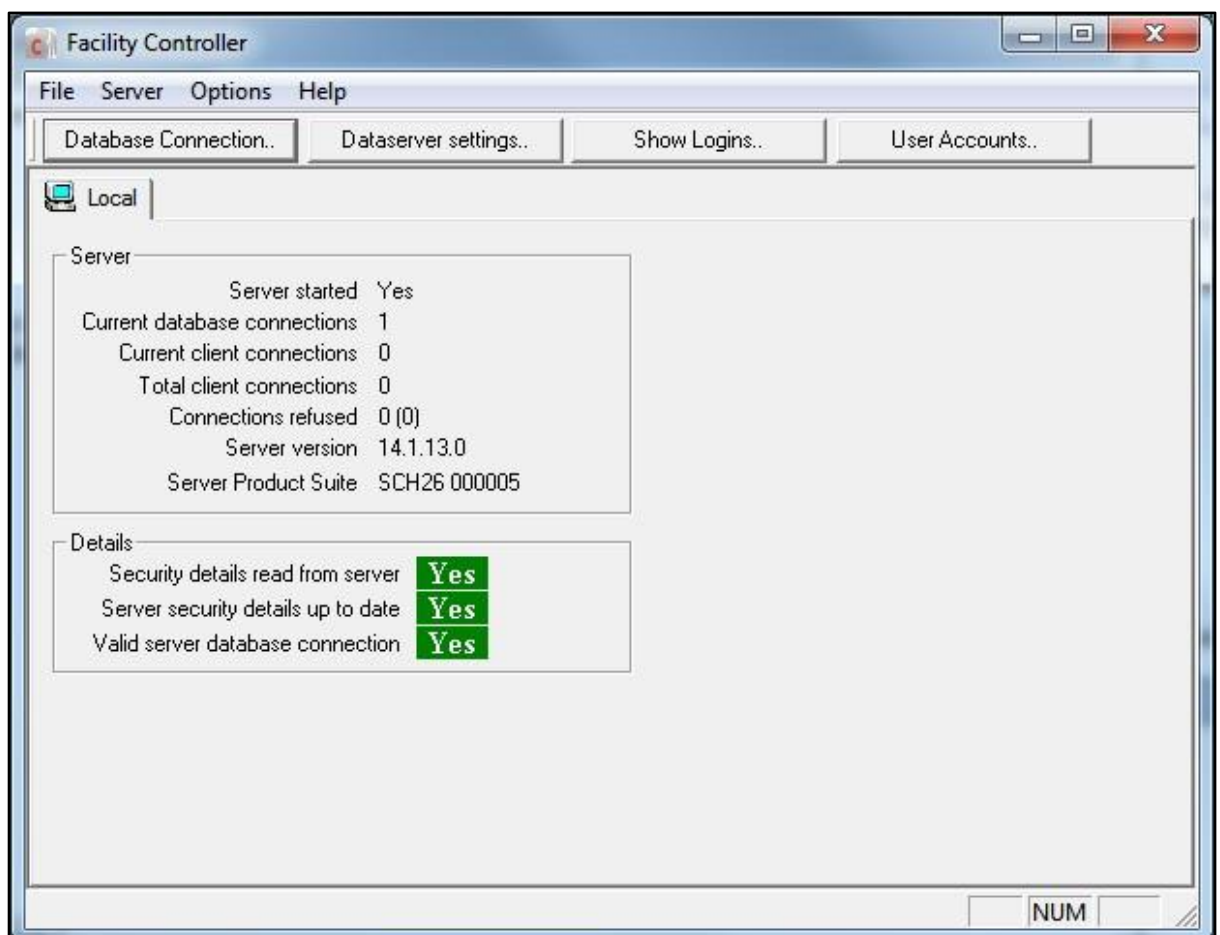
4.1 Licence key

After ePortal has been installed, it will default to a basic licence key with limited access. The correct one will need to be inserted in order to gain access to the full functionality.

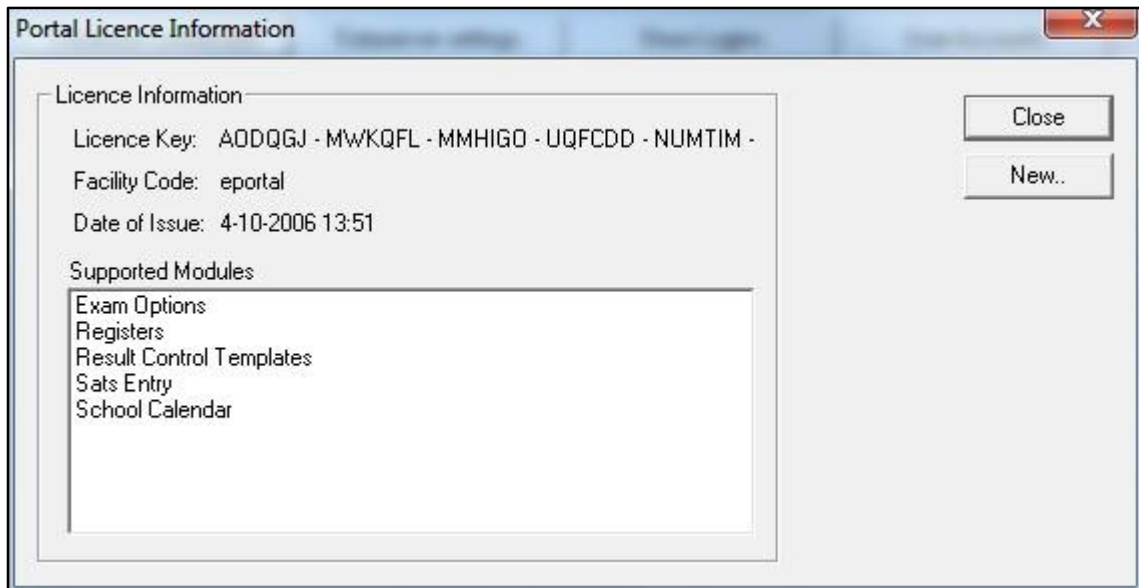
1. Go to Start | All Programs | Facility ePortal | Facility Controller.



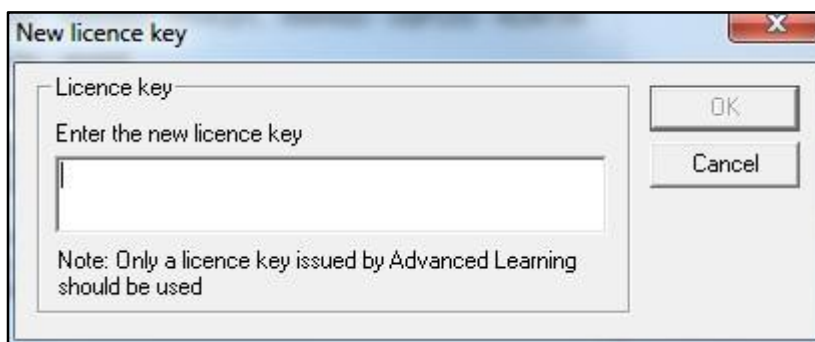
The 'Facility Controller' window appears.



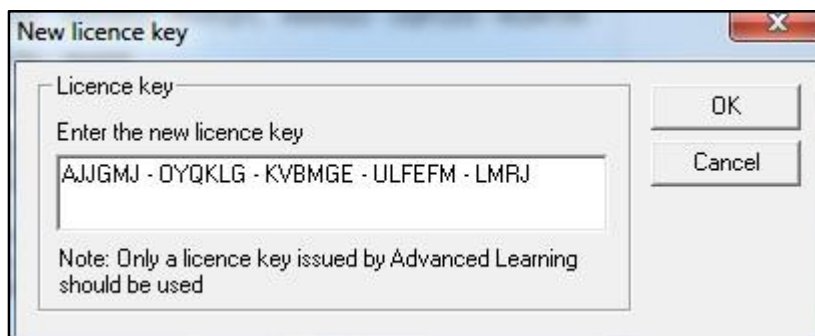
2. Go to Server | Licensing.... The 'Portal Licence Information' window appears.



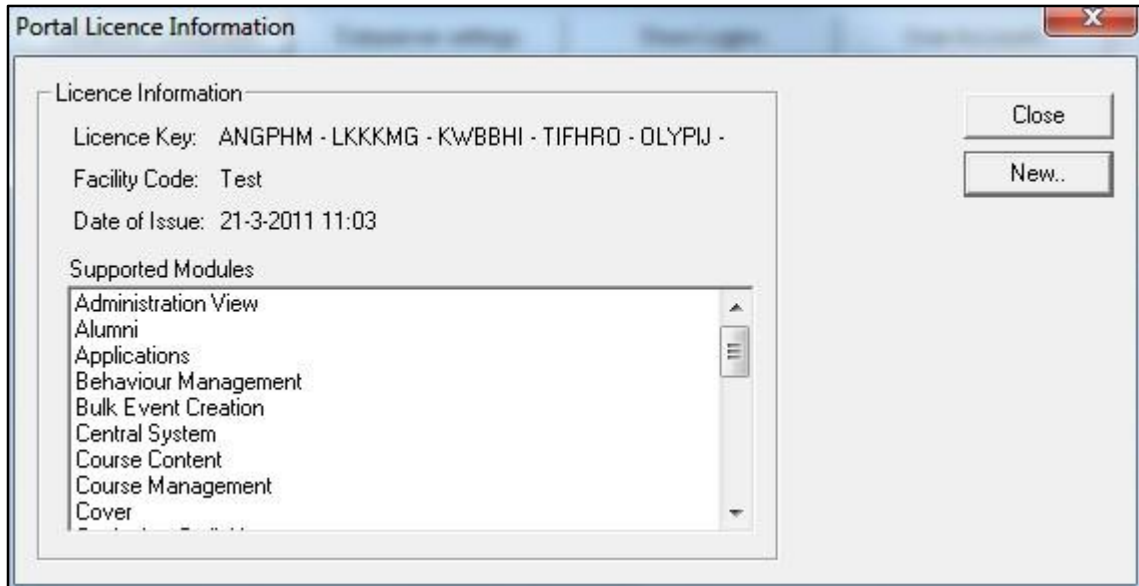
3. Click New... The 'New licence key' windows appears.



4. In the 'Enter the new licence key' text box, type or paste the licence key.



5. Click OK. The 'Portal Licence Information' window appears, with the 'Supported Modules' list window showing the modules included.



6. Click Close.
7. Restart both the ePortal services (Facility Data Server and Facility ePortal) to enable the updated licence key to take effect.

4.2 Copying configuration '.xml' files back

If changes have been made to the '.xml' files, certain files can be copied back to the new installation directory.

4.3 Updating 'API.xml' file

Note: ePortal 14.2 uses Tomcat 7 and this requires the IP addresses to be separated by a pipe, rather than a comma.

1. Browse to and select the backed up 'API.xml' file.
2. Right-click and select Edit. The file will open in Notepad, or you can use a similar text editor.
3. Browse to the new ePortal install folder:
[Drive]:\Facility\ePortal\conf\Catalina\localhost\
4. Select the 'API.xml' file.
5. Right-click and select Edit. The file will open in Notepad, or you can use a similar text editor.
6. Copy the IP addresses from the old 'API.xml' file and paste it into to the new one separated by a pipe '|', with no spaces in between the IP addresses and the pipe.

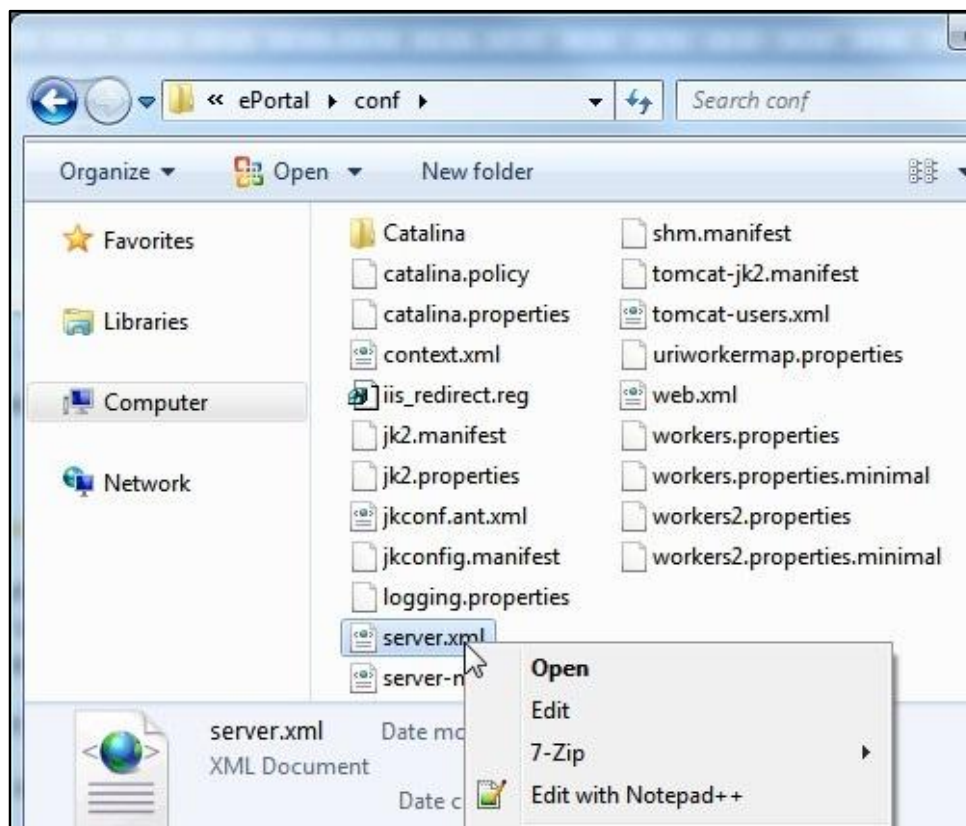
E.g. `<Valve className="org.apache.catalina.valves.RemoteAddrValve" allow="127.0.0.1|111.31.222.179|234.56.78.876" />`

7. With the new 'API.xml' file, click File | Save.
8. Close Notepad.

4.4 Update 'server.xml' file

By default, ePortal will use port number '8080' for 'http' and '8443' for 'https'. If, similar to section 2.7, these were different to the default values, these will need to be updated.

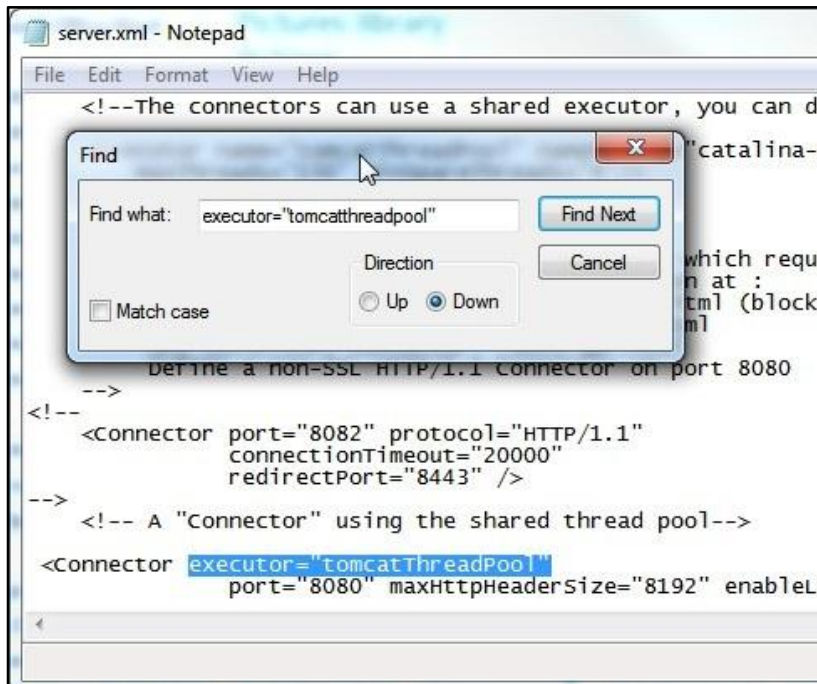
1. Browse to the current ePortal install folder:
[Drive]:\Facility\ePortal\conf
2. Select the 'server.xml' file.
3. Right-click and select Edit. The file will open in Notepad, or you can use a similar text editor.



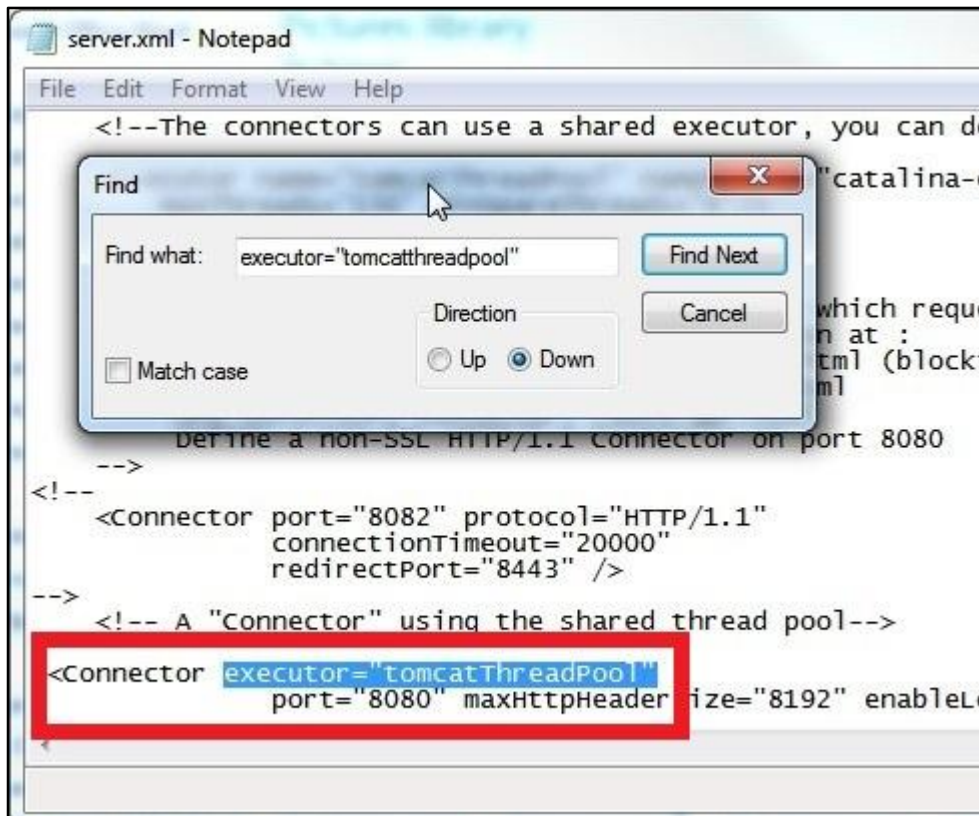
4. Go to Edit | Find. The 'Find' window appears.
5. In the 'Find what:' text box, type 'executor="tomcatThreadPool"'.



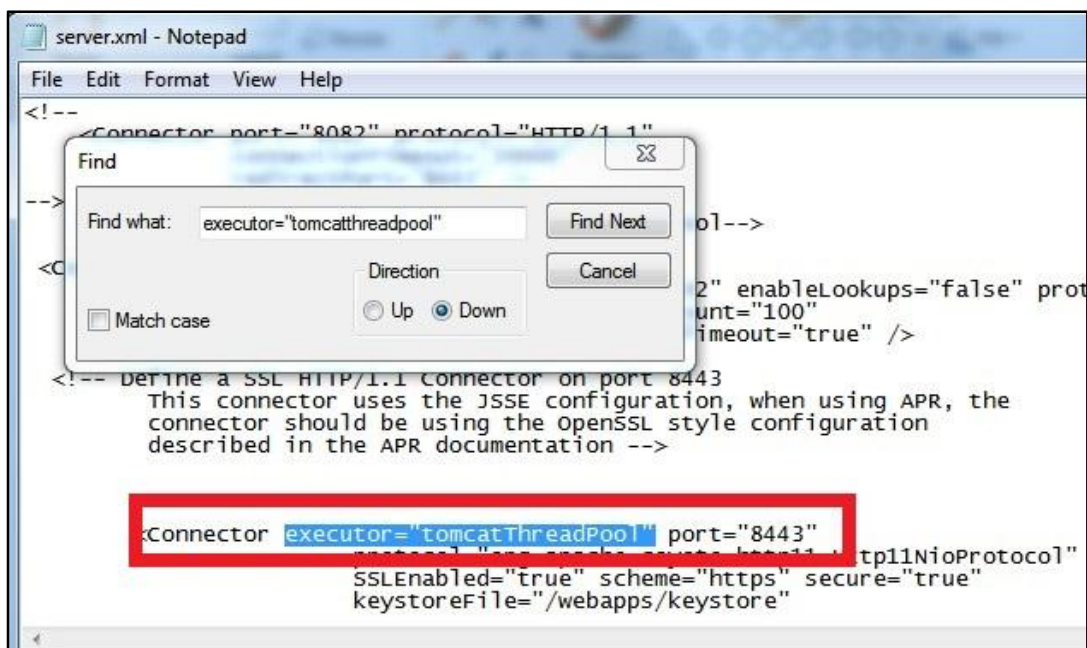
6. Click Find Next. The first result will be highlighted.



7. Change the port highlighted to the correct value.



8. Click Find Next again.
9. This will find the next instance of 'executor="tomcatThreadPool"'.
10. Change the port number highlighted to the correct value.



11. Go to File | Save.
12. Close the file.

4.5 Copy back folder permissions

If a file was created containing details of folder permissions, see section 2.8. Copy back these folder permissions into the 'bin', 'conf', 'logs' and 'eportal' folders. For more details, see the Knowledge Base (KB) article on Firstline titled 'What are the default permissions for use with IIS and ePortal?'.

4.6 Creating VLE guest Account

If the school uses the SkillSpace learning platform, a specific user type must be setup in Facility controller. To do this please refer appendix 5.4.

5 Appendices

5.1 Upgrading to 14.2 from version 13.1 or earlier of ePortal

If upgrading from version 13.1 or earlier to version 14.2, please follow the steps in this section as the requirement is to uninstall ePortal first. This is due to change in the Tomcat version used for ePortal. If the existing version is not uninstalled first it can lead to issues later on.

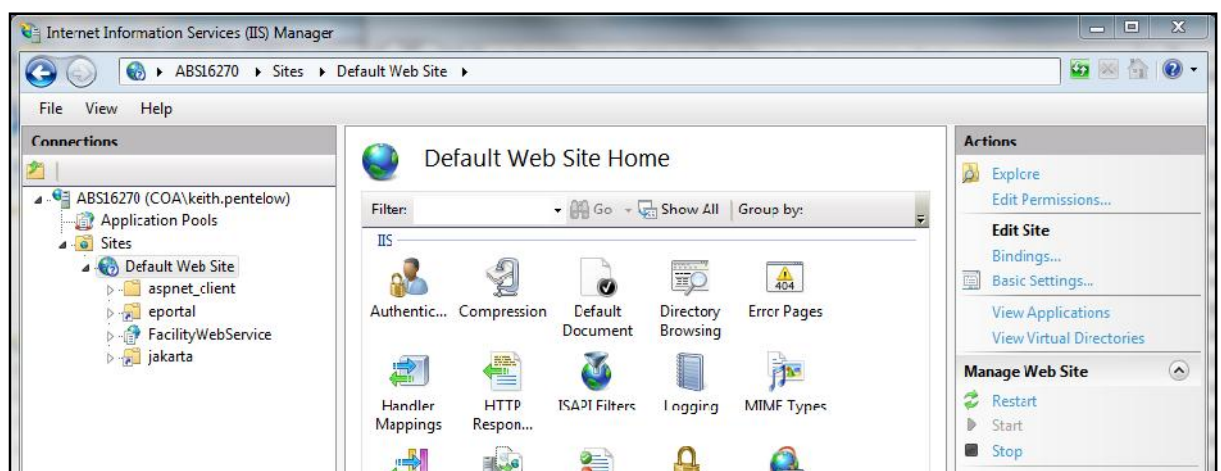
5.1.1 Stop the ePortal services

1. Log into the ePortal server as 'Administrator'.
2. Go to Start | Run. The 'Run' window appears.
3. In the 'Open:' text box, type 'services.msc'.
4. Click OK. The 'Services' window appears.
5. Scroll down and select 'Facility ePORTAL.'
6. Right-click and select Stop.
7. Repeat steps 4 and 5 for the Facility Data Server.
8. Minimise this window.

5.1.2 Stop Internet Information Services (IIS)

If Internet Information Services (IIS) is being used with the current ePortal installation, the Default web site will need to be stopped prior to the upgrade.

1. In ePortal server, go to Start | Control Panel | Administrative Tools and double-click 'Internet Information Services (IIS)'. The 'Internet Information Services (IIS) Manager' window appears.



2. In the folder structure on the left, expand the server node to view the tree.

3. Expand the 'Sites' node to view the tree.
4. Select 'Default Web Site'.
5. In the panel on the right, in the 'Manage Web Site' section, click Stop. The ePortal service is stopped.

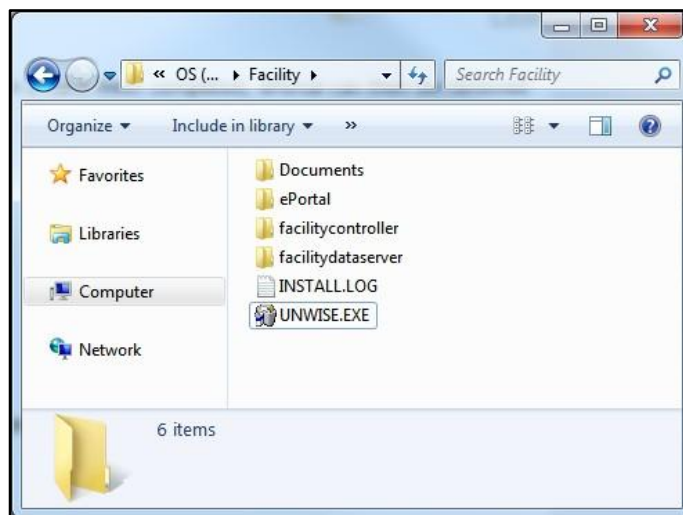
5.1.3 Close any relevant applications

Close any other relevant applications that are currently running, e.g. Facility Controller, Internet Explorer, etc.

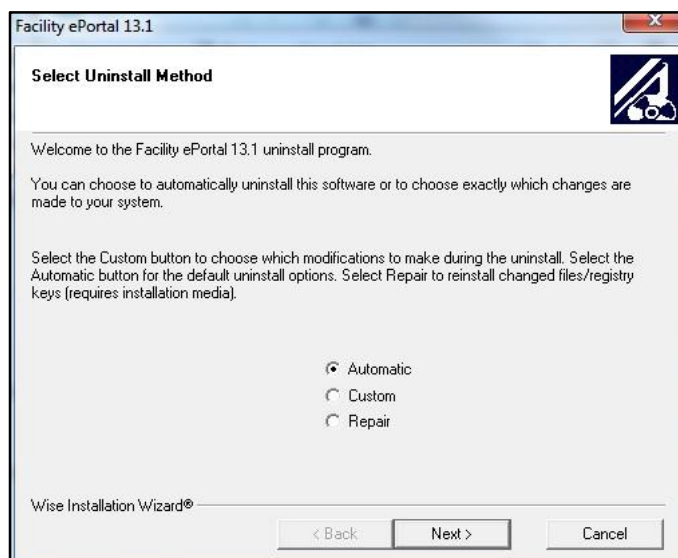
5.1.4 Uninstall ePortal

1. Browse to the current installation of ePortal, unusually found in:

[Drive]:\Facility

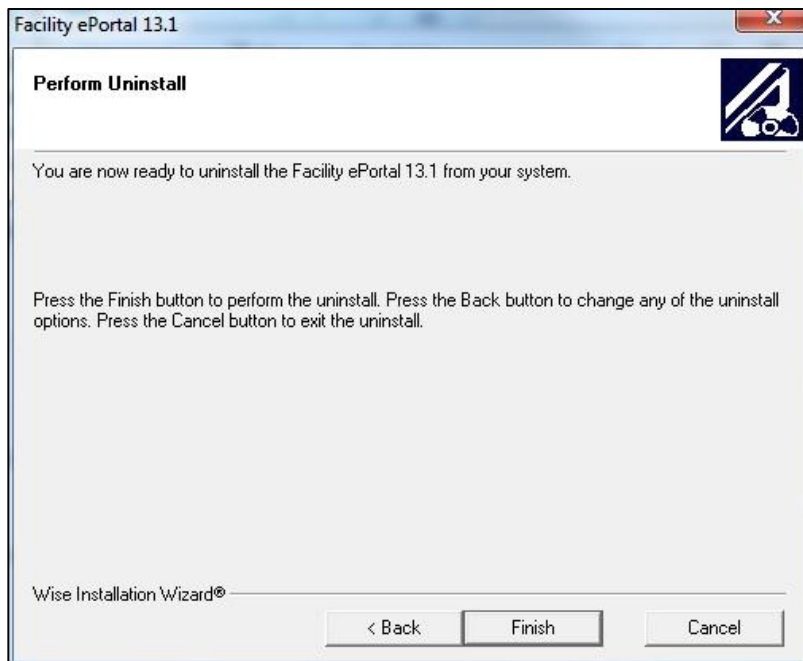


2. Double-click the 'UNWISE.exe' file. The 'Select Uninstall Method' window appears.

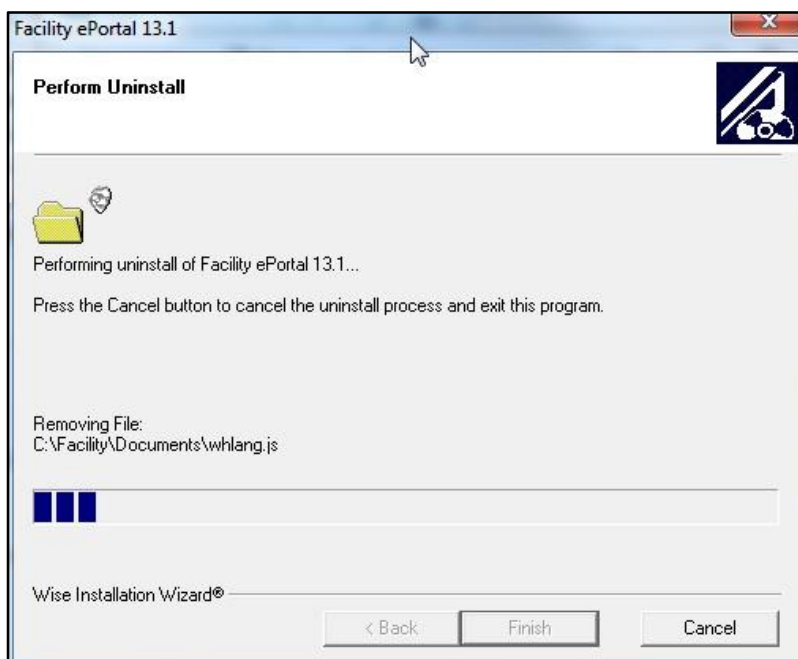


3. Select 'Automatic'.

4. Click Next. The 'Perform Uninstall' window appears.



5. Click Finish. A progress bar is displayed.



6. Once this has finished, restart the server to complete the uninstall. This ensures all registry entries have been removed.
7. To complete the installation process, continue from the following step in section 4 'Error! Reference source not found.'

5.2 Single Sign On

Please refer to the Single Sign On (SSO) manual which is available to download from Firstline.

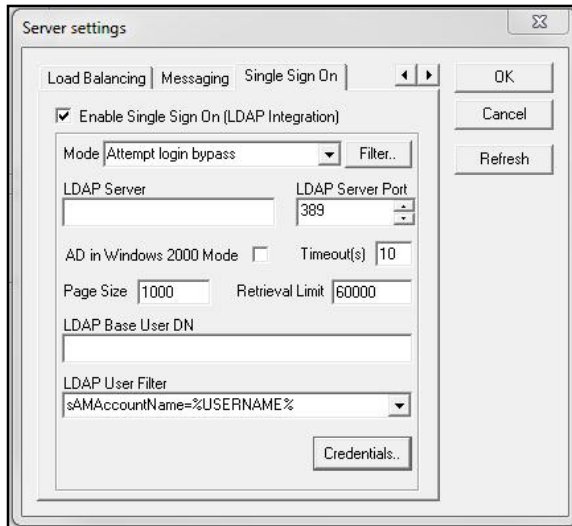
If SSO is already configured, the following steps will need to be carried out before and after the installation process.

5.2.1 Steps before uninstall

1. Browse to: [Drive]:\Facility\ePortal\bin\win32\i386
2. Select the 'IsapiRewrite4.ini' file.



3. Right-click and select Copy.
4. Navigate to the folder for the backup.
5. Right-click and select Paste.
6. Open Facility Controller.
7. Go to Server | Server settings.... The 'Server settings' window appears.
8. Scroll to and select the 'Single Sign On' tab.



9. Copy values from each of the following fields and paste into a Notepad document.

- Mode
- LDAP Server
- LDAP Server Port
- Page Size
- Retrieval Limit
- LDAP Base User DN (copy all text)
- LDAP User Filter

10. Click Filter... The 'Login filter settings' window appears. Copy values from each of the following fields, if populated.

- Domain Name
- IP Address
- Computer Name

11. Click Cancel.

12. Click Credentials... The 'Credentials' window appears. Copy values from each of the following fields.

- Mechanism
- Authentication Domain (if populated)
- Principal (The password should be known for the 'Principal' user)

13. Save the Notepad document with a helpful name in the folder for the backup.

14. Continue with the steps in section 2 of this document.

5.2.2 Steps after installation

1. Once the installation has been carried out, following section 4, allow the server to reboot.
2. Stop the IIS services, restore the 'IsapiRewrtie4.ini' file from the backup.
3. Browse to: [Drive]:\Facility\ePortal\webapps\eportal\conf
4. Select the 'settings.xml' file.
5. Right-click and select Edit. The file will open in Notepad, or you can use a similar text editor.
6. Go to Edit | Find. The 'Find' window appears.
7. In the 'Find what:' text box, type 'UseIIS'.
8. Click Find Next. This will find the following code:

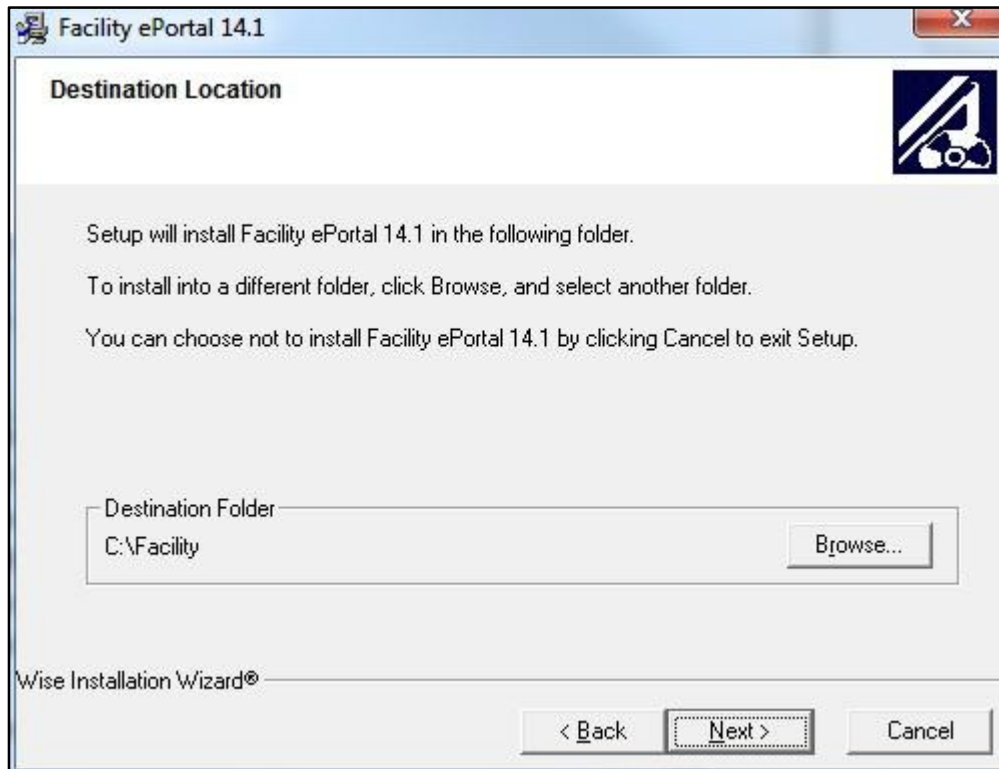
```
<setting type="boolean">  
    <name>UseIISAuthenticationForSingleSignOnBypass</name>  
    <value>>false</value>  
</setting>
```

9. Change the <value> from 'false' to 'true'.
10. Go to File | Save.
11. Start the IIS services.
12. Open Facility Controller.
13. Select Server | Server settings.... The 'Server settings' window appears.
14. Scroll to and select the 'Single Sign On' tab.
15. Using the details that were recorded previously, re-enter the data in the required fields.
16. Select Filter, again re-enter any details that were recorded previously and click Close, to close this window.
17. Click Credentials, re-enter the details that were recorded previously. Click OK to close this window
18. Click OK to close the 'Server settings' window.
19. Restart both ePortal services.

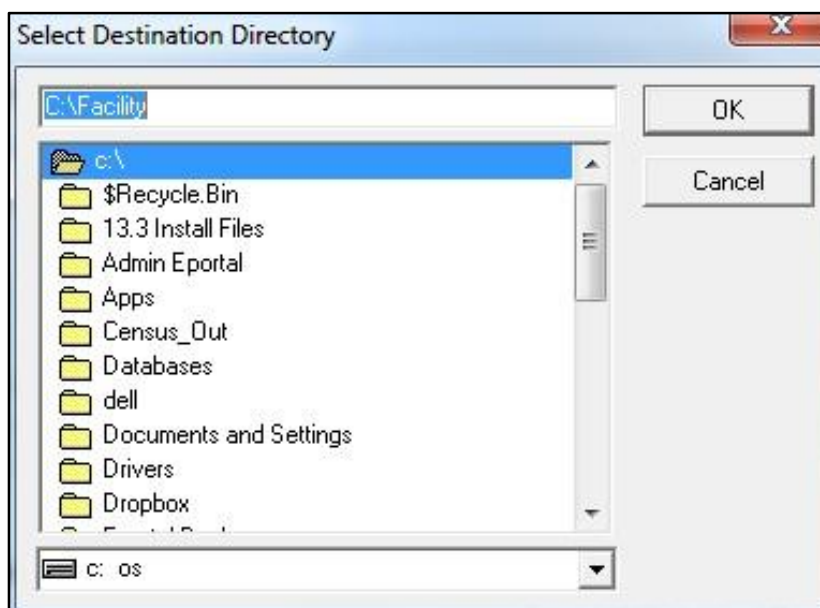
5.3 Choosing a different installation folder for ePortal

If the installation directory needs to be changed from the default:

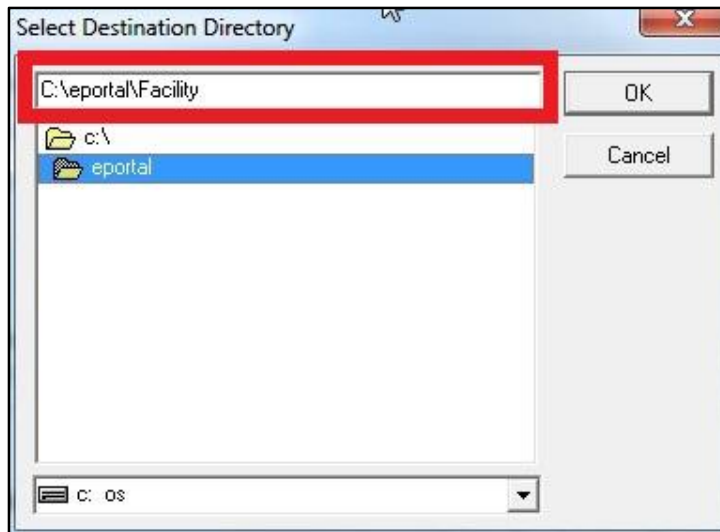
1. In the 'Destination Location' dialog, click Browse.



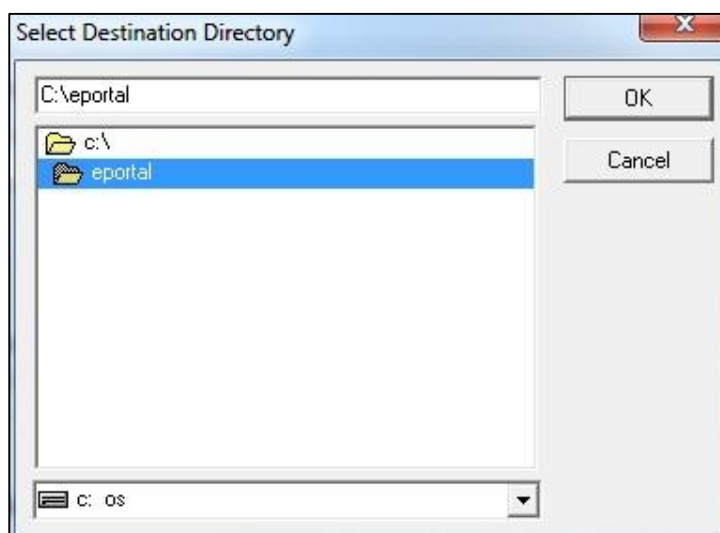
The 'Select Destination Directory' window appears.



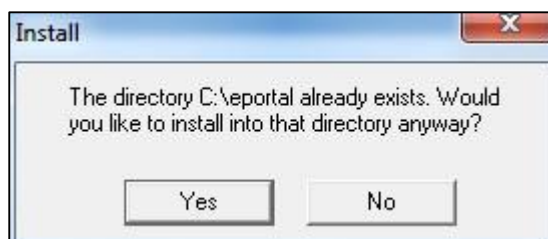
2. Select the required drive and double-click the folder, e.g. 'eportal'. If the folder required does not exist, cancel the setup, create the folder and start again from step 1 in section 0.



3. This adds a folder called 'Facility' to the folder just selected.
4. Click in the top field and delete '\Facility'.

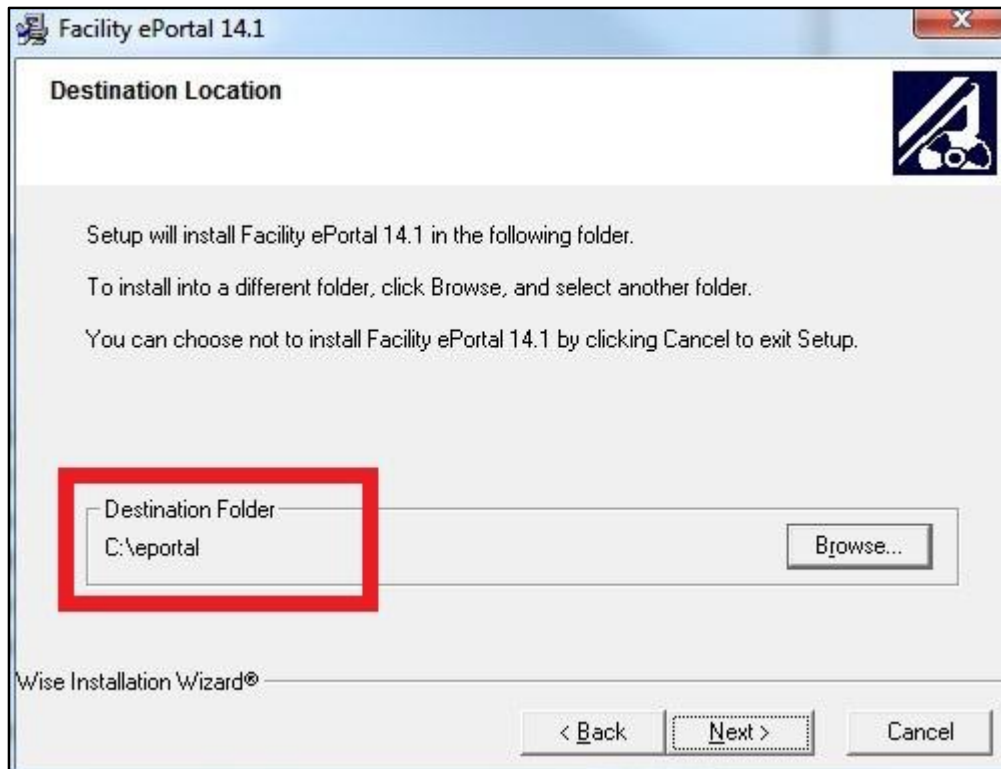


5. Click OK. An 'Install' dialog is displayed.



6. If the path is correct, e.g. C:\eportal, click Yes, otherwise click No and reselect the correct path.

The 'Destination Location' window is displayed again showing the new path.

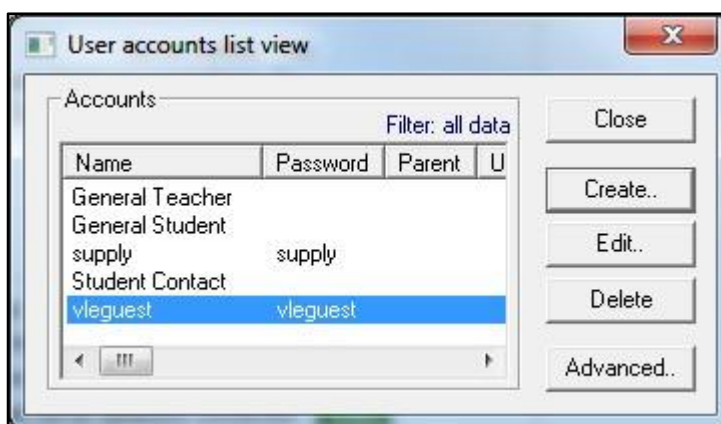


- Click Next. The 'Select Components' window appears. Please continue with step 6 in section 0.

5.4 VLE Guest account

If the school uses the Skillspace learning platform, a specific user type has to be configured in Facility Controller.

- Open Facility Controller.
- Select User Accounts. The 'User accounts list view' window appears.



- If 'vleguest' is not listed, please see the 'Troubleshooting the ePortal installation' manual.

5.5 Installation checklist

The following checklist may be helpful as an overview of the upgrade process.

Steps	Check
Facility Administration has been successfully installed.	☐
Data and Templates backups have been taken in Admin.	☐
Note the location of the current ePortal installation: Path:	☐
A copy of the ePortal directory has been taken ([Drive]:\Facility\ePortal\webapps\ePortal)	☐
A copy of the API.xml file has been taken [Drive]:\Facility\ePortal\conf\Catalina\localhost)	☐
A copy of the custom assessment template grids file has been taken.	☐
Any other files have been moved out of the ePortal current installation folder.	☐
Have a copy of the ePortal licence key.	☐
Note the location of the data source file, File name: Location:	☐
Port numbers noted down, if different to default values.	☐
Facility ePortal Service Stopped. Facility Data Server Stopped. IIS Service Stopped.	☐
ePortal has been completely uninstalled.	☐
Server has been restarted following uninstall.	☐

ePortal is installed using same path as previous version.	☐
If not, note the new path:	☐
Server has been restarted after new version is installed.	☐
Check the Facility Controller version number (Help About Facility Controller) to make sure it has upgraded to the relevant version.	☐
Enter the Licence Key in Facility Controller and restart both services.	☐
Ensure all the correct modules are available (e.g. Admin View, MLS Messaging, Single Sign On, etc.)	☐
(For Skillspace users) ensure that the VLEGUEST account is setup in Facility Controller.	☐
If vertical class groups are used, confirm that ePortal is set up for this.	☐
If the school is a Welsh school, ensure that all specific Welsh ePortal features are available.	☐
Update server.xml file if not using the default ports.	☐
Copy the relevant configuration xml files back to the [Drive]:\Facility\ePortal\webapps\eportal\conf folder, using the 'Can I copy xml files back in after upgrading ePortal to 13.3' article as guide	☐
If Single Sign On is used, restore settings, see Appendix 6.2.	☐
Facility Data Service started successfully.	☐
Facility ePortal started successfully.	
IIS Service started successfully.	
The ePortal home page is accessible on the server and client machines.	☐
It is possible to login to ePortal.	☐