



**INSTALLATION AND UPGRADE GUIDE
FOR
PLUMTREE FOUNDATION (UNIX AND LINUX)**

Plumtree Foundation 6.0

April 2006 Update

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Welcome

This book describes how to install and deploy the components of Plumtree Foundation 6.0. Its contents provide details for the following basic installation steps:

1. Familiarize yourself with the components of Plumtree Foundation. For information, see [Chapter 2, “Overview of the Plumtree Application Suite G6.”](#)
2. Complete pre-installation steps, such as reading the release notes, planning and provisioning host computers for your deployment, and configuring compatible, pre-requisite software. For information, see [Chapter 3, “Pre-Installation Steps.”](#)
3. Install the Foundation Components. For information, see [Chapter 4, “Installing Plumtree Foundation.”](#)
4. Create and script the Foundation database. For information, see [Chapter 5, “Setting Up the Foundation Database.”](#)
5. Review the post-installation tasks. For information, see [Chapter 6, “Post-Installation Tasks.”](#)

If you are upgrading an existing Plumtree Portal deployment to Plumtree Foundation 6.0, see [Chapter 7, “Upgrading to Foundation 6.0.”](#)

Portal administrators should read this book and create a solid portal strategy before performing the tasks described within. This allows you to use Plumtree Foundation’s most powerful features to create a stable, useful portal that can grow with your company without having to be reorganized or recreated every time the company changes.

Who Should Read This Book

This book is written for portal implementers who are responsible for installing and maintaining the portal system, getting information into the portal, creating places for users to collaborate on projects, managing portal users and groups, and other tasks that improve the usefulness of the portal.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1: Typographical Conventions

Convention	Typeface	Example
<ul style="list-style-type: none">• File names• Folder names• Screen elements	bold	<ul style="list-style-type: none">• Upload Procedures.doc to the portal.• Open the General folder.• To save your changes, click Apply Changes.
<ul style="list-style-type: none">• Text you enter	<code>computer</code>	<ul style="list-style-type: none">• Type <code>Marketing</code> as the name of your community.
Variables you enter	<i>italic computer</i>	Enter the base URL for the Portlet Server. For example, <code>http://my_computer/</code> .

Table 1-1: Typographical Conventions

Convention	Typeface	Example
<ul style="list-style-type: none"> • New terms • Emphasis • Plumtree object example names 	<i>italic</i>	<ul style="list-style-type: none"> • <i>Portlets</i> are Web tools, embedded in your portal. • The URI <i>must</i> be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.

Icons Used in This Book

This book uses the following margin icons:



Note: The Note icon is used to denote tips, best practices, or additional information related to the content in a paragraph.




Important: The Important icon is used to denote important information (including warnings) related to the content in a paragraph.

Plumtree Documentation

This section describes the documentation and resources provided by Plumtree.

Resource	Description
Administrator Guide	This book describes how to perform portal management, maintenance, and troubleshooting for your Plumtree Foundation. It is available in electronic form (PDF) in the Plumtree Product Center.
Upgrade Guide	This book is written for portal administrators. It describes how to upgrade your Plumtree Foundation. It is available in electronic form (PDF) in the Plumtree Product Center.
Release Notes	These files are written for portal administrators. They include information about new features and known issues in the release. They are available in electronic form (HTML) in the Plumtree Product Center.

Resource	Description
Developer Guides, Quickstarts, API Documentation, and Sample Code	<p>These documents are written for developers. They describe how to customize the Plumtree Application Suite user interface and features. They are available with the product installation packages in the Plumtree Support Center and/or Developer Center.</p>
Deployment Guide	<p>This document is written for business analysts and system administrators. It describes how to plan your Plumtree Application Suite deployment.</p> <p>It is available in electronic form (PDF) in the Plumtree Deployment Center.</p>
Online Help	<p>The online help is written for all levels of portal users. It describes the user interface for the portal and gives detailed instructions for completing tasks in the portal.</p> <p>To access online help, click  Help in the upper-right corner of the portal banner or portlet.</p>

Resource	Description
Plumtree Support Center	<p>The Plumtree Support Center is a comprehensive repository for technical information on Plumtree products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your Plumtree-related needs. The Support Center encompasses the following communities:</p> <p>Technical Support Center</p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p>Deployment Center</p> <p>Find the tools you need to roll out, drive, and maintain a successful Plumtree Application Suite deployment. Collaborate with peers on strategic business and technical objectives, learn application best practices, download portal launch examples, and calculate your return on investment (ROI).</p> <p>Product Center</p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p>Developer Center</p> <p>Download developer tools and documentation, get help with your development project, and interact with other developers via discussion forums.</p> <p>Education Center</p> <p>Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p>If you do not see the Support Center when you log in to http://portal.plumtree.com, contact support@plumtree.com for the appropriate access privileges.</p>

Resource	Description										
Technical Support	<p>If you cannot resolve an issue using the above resources, Plumtree Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.</p> <p>E-mail: support@plumtree.com</p> <p>Phone Numbers:</p> <table> <tr> <td>U.S. and Canada</td><td>+1 415.263.1696 or +1 866.262.PLUM (7586)</td></tr> <tr> <td>Asia Pacific</td><td>+61 2.9931.7822</td></tr> <tr> <td>Europe and U.K.</td><td>+44 (0)1628 589124</td></tr> <tr> <td>France</td><td>+33 1.46.91.86.79</td></tr> <tr> <td>Singapore</td><td>+65 6832.7747</td></tr> </table>	U.S. and Canada	+1 415.263.1696 or +1 866.262.PLUM (7586)	Asia Pacific	+61 2.9931.7822	Europe and U.K.	+44 (0)1628 589124	France	+33 1.46.91.86.79	Singapore	+65 6832.7747
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2

Overview of the Plumtree Application Suite G6

The sections in this chapter summarize the components of the Plumtree Application Suite G6 and provide references to the corresponding installation documentation for these components. This chapter includes the following sections:

- [“Plumtree Foundation Components” on page 2-1](#)
- [“Plumtree Identity Services” on page 2-2](#)
- [“Plumtree Server Components” on page 2-3](#)
- [“Plumtree Integration Product Components” on page 2-3](#)

For an overview of the portal solution and elaboration of portal deployment options, see the *Deployment Guide for the Plumtree Application Suite G6*.

Plumtree Foundation Components

This guide, the *Installation and Upgrade Guide for Plumtree Foundation*, describes how to install the following core components of Plumtree Foundation.

Component	Description
Portal Server	Displays end user portal pages and content. The Portal Server allows end users to access portal content via MyPages, Community Pages, the Knowledge Directory, and Search. The Portal Server also allows for some administrative actions such as setting preferences on Portlets or managing communities.
Plumtree Administrative Portal	Handles portal setup, configuration, and content. The Plumtree Administrative Portal contains all of the functionality of Portal Server in addition to all of the administrative functions such as creating and managing portlets and other web services.
Plumtree Image Service	Serves static content used or created by portal components. The Plumtree Image Service serves images and other static content for use by the Plumtree system. The use of a separate image server can significantly improve performance of the Plumtree system.
Plumtree Search	Returns indexed content stored in the portal. Plumtree Search returns content that is indexed in the Plumtree system from the Portal, Plumtree Collaboration, and Plumtree Publisher. Content that is indexed in the Plumtree system includes documents, portlets, communities, and users as well as many other Plumtree objects.

Plumtree Automation Service	<p>Runs jobs and other automated portal tasks.</p> <p>The Plumtree Automation Service runs jobs that perform tasks such as crawling documents into the Knowledge Directory, synchronizing groups and users with external authentication sources, and maintaining the search collection.</p>
Plumtree Document Repository Service	<p>Stores documents uploaded by portal components.</p> <p>The Plumtree Document Repository Service stores content uploaded into the Plumtree system such as images or documents uploaded into Plumtree Collaboration or Plumtree Publisher.</p>
Plumtree API Service	<p>Provides access to Plumtree's SOAP API.</p> <p>Having a separate server for the API allows for greater flexibility in portal deployments, especially for extranets.</p>
Plumtree Content Upload Service	<p>Plumtree Content Upload Service uploads files to the Plumtree Document Repository Service so that they are available through the Knowledge Directory. This allows portal users who do not have access to the internal file network (for example, extranet users) to submit files to the portal Knowledge Directory.</p>

In addition to installing these components, before you can use the Portal, you must set up a database for use by the Portal (see [“Setting Up the Foundation Database” on page 5-1](#)) and you must make sure that application servers are configured to support the portal ([“Configuring a Web Application Server” on page 8-1](#)).

Plumtree Identity Services

The following components provide authentication resources for Plumtree Foundation.

Component	Description
Plumtree Identity Service - Active Directory	The Plumtree Identity Service - Active Directory allows you to import Active Directory users and groups into your portal and authenticate against repositories inside or outside your network. Portal administrators can then create Remote Authentication Sources that access the Active Directory.
Plumtree Identity Service - LDAP	The Plumtree Identity Service - LDAP is intended to import users and their information into the portal from an external source. This information can then be mapped to Plumtree properties and stored in the Plumtree database.

Plumtree Server Components

The following table summarizes the documentation you use to install Plumtree Application Suite components that enable collaboration features, content management, and Web application creation.

Component	Documentation
Plumtree Collaboration	<i>Installation Guide for Plumtree Collaboration</i>
Plumtree Publisher	<i>Installation and Upgrade Guide for Plumtree Publisher</i>
Plumtree Studio	<i>Installation and Upgrade Guide for Plumtree Studio</i>

Plumtree Integration Product Components

For information about installing additional portlets and Content Services to support document types used in your portal, see the Plumtree Product Center Web site:

<http://portal.plumtree.com>. If you do not yet have a support center account, send mail to support@plumtree.com.

3

Pre-Installation Steps

Before you run the Plumtree Foundation installer, complete the following steps:

1. Read the product release notes for information on compatibility issues, known problems, and workarounds that might affect how you proceed with your deployment. Release notes are located in the Product Center.
2. Plan your portal deployment. For more information, consult the *Deployment Guide for Plumtree Application Suite G6*. For installation in a production environment, determining the number of computers and how to distribute the components of Foundation across the computers can be complicated. Consulting Plumtree Consulting Services (PCS) or your Plumtree integration partner is recommended.
3. Provision host computers and configure software dependancies for your deployment. For details, see [“Hardware and Software Requirements” on page 3-1](#). For more information on configuring your Web application server for use with the portal, see
4. Organize the information needed for the installation process by completeing the installation worksheets. For the worksheets, see
5. Create a user and group for the Plumtree software. A shell script, **preinstall.sh**, is provided to help you with this process. For details, see

Hardware and Software Requirements

The following table summarizes the hardware, operating system and software requirements for Plumtree Foundation. For more details on hardware and scaling, see the *Deployment Guide for Plumtree Application Suite G6*. For the most current platform support information, refer to the Interoperability Matrix in Product Center.



Important: IPv6 is not supported. You should verify that IPv6 is not enabled prior to installing Plumtree Foundation.

Component	Requirement
Foundation Host Computer	<ul style="list-style-type: none">• Red Hat Enterprise Linux 3 Update 3 (ES & AS), on x86• SUSE Enterprise Linux 9, on x86• AIX 5.3, on POWER3, POWER4, POWER5• Solaris 8 and 9, on SPARC
Database Server Host Computer	<ul style="list-style-type: none">• Oracle 9i (9.2.0.4) in default or Oracle RAC configuration• Oracle 10g (10.1.0.3) in default or Oracle RAC configuration

Component	Requirement
Web application server	<p>Red Hat</p> <ul style="list-style-type: none"> • BEA WebLogic 8.1 SP4, JRocket SDK 1.4.2_05-8140 • Tomcat 5.0.28, Sun SDK 1.4.2_06 <p>SUSE</p> <ul style="list-style-type: none"> • BEA WebLogic 8.1 SP4, JRocket SDK 1.4.2_05-8140 • IBM WebSphere 6.0.1, IBM SDK 1.4.2 • Tomcat 5.0.28, Sun SDK 1.4.2_06 <p>Solaris</p> <ul style="list-style-type: none"> • BEA WebLogic 8.1 SP4, Sun SDK 1.4.2_05 • Tomcat 5.0.28, Sun SDK 1.4.2_06 <p>AIX</p> <ul style="list-style-type: none"> • IBM WebSphere 6.0.1, IBM (32-bit) SDK 1.4.2
Browser	<ul style="list-style-type: none"> • Administrative Users: Internet Explorer 5.5, 6.0 • Browsing Users: Internet Explorer 5.5, 6.0; Netscape 7.2; Firefox 1.0; Safari 1.2 (Mac only)



Important: For time-sensitive operations, it is important that the computers on which all portal components are installed be time-synced to their respective database servers. Consult your system administrator for information on how to perform the time-sync.



Note: With this release, Plumtree has included a version of the Tomcat servlet container as a convenience. Plumtree tests its products against the Tomcat servlet container and will provide technical support if its products do not operate according to their specifications when running inside the exact supplied version of Tomcat. However, Plumtree does not warrantee this, or any other, distribution of the Tomcat servlet container itself, and cannot provide technical support for the servlet container itself. For additional information on the suitability of Tomcat for your installation and help in choosing a Web application server for your portal deployment, see the *Deployment Guide for Plumtree Application Suite G6* or contact Plumtree Professional Consulting Services

Creating the Plumtree User and Group

It is recommended that you create a user and group that will own the portal installation. The following table lists recommended values for the user, group, and plumtree directories..

Pre-install Setting	Standard Value	Notes
Plumtree User Group	plumtree	Local group with a fixed ID
Plumtree User	plumtree	Local group with a fixed ID

Pre-install Setting	Standard Value	Notes
Plumtree Home (PT_HOME)	/opt/plumtree	Owned by 'plumtree' user and group
Installer Configuration Home	/etc/plumtree	Owned by 'root' user and 'plumtree' group

The same values for these users, groups, and directories should be used across all machines hosting portal components. Local users and groups with fixed IDs are recommended. Secure deployments should avoid NIS users for machine security. Using the same local user and group for all Plumtree Application Suite G6 services allows an administrator to lock down host machines and audit activity.

For convenience, **preinstall.sh**, a script to create users, groups and directories, is provided in the Product Center.

The Pre-Install Script: preinstall.sh

The **preinstall.sh** script creates a user, group and directories with permissions appropriate for the Plumtree Application Suite G6. The script is interactive, asking you a series of questions about the values to be configured.

For a one-machine install using the standard values, the **preinstall.sh** script can be used as-is. The following values can be specified dynamically as the script runs:

Property	Default Value
INSTALL_DIRECTORY	/opt/plumtree
USER_SHELL	/bin/sh
PLUMTREE_GROUP_NAME	plumtree
PLUMTREE_GROUP_ID	5000
PLUMTREE_USER_NAME	plumtree
PLUMTREE_USER_ID	5000

If the user or group you designate to the script for Plumtree to use already exists, the script does not attempt to create them.

To run the script, complete the following steps:

1. Review the **preinstall.sh** script.
2. Become superuser or log in as root.
3. Make a temporary directory for the files and allow all users to access these files by typing:

```
# mkdir /tmp/plumtree
# chmod 777 /tmp/plumtree
```
4. Copy the preinstall file by typing:

```
# cd /tmp/plumtree
# cp /<install_root>/scripts/preinstall.sh .
```
5. Run the **preinstall.sh** script by typing:

```
# ./preinstall.sh
```

Be sure to carefully review any output from the script.
6. Change the password of the newly created user by typing:

```
# passwd plumbtree
```

7. Enter the login password.
8. Log out as superuser.

4

Installing Plumtree Foundation

This chapter describes how to install Plumtree Foundation. If you are upgrading, first refer to [Chapter 7, “Upgrading to Foundation 6.0.”](#)

To install the Plumtree Foundation components:

1. Ensure you have completed the pre-installation steps. For details, see [Chapter 3, “Pre-Installation Steps.”](#)
2. Run the Foundation installer on each computer that will host Foundation components. For details, see [“Installing the Foundation Components” on page 4-1.](#)
3. Deploy the Image Service. For details, see [“Deploying the Image Service” on page 4-4.](#)
4. Set up and start the portal database. This must be done before starting the portal. For details, see [Chapter 5, “Setting Up the Foundation Database.”](#)
5. Start the Foundation component daemons. For details, see [“Starting and Stopping Foundation Services” on page 4-5](#)
6. Start the portal. For details, see [“Starting the Portal” on page 4-7.](#)
7. Verify your installation. For details, see [“Testing the Installation” on page 4-7](#)



Note: You can install the Foundation components in any order; however, you should not start any of the components until all components are installed. If you want to start and test the components as you install them, the following order is recommended:

1. Plumtree Image Service
2. Plumtree Search
3. Plumtree Document Repository Service
4. Plumtree Administrative Portal
5. Plumtree Automation Service
6. Plumtree API Service
7. Portal Server
8. Plumtree Content Upload Service



Important: The portal database must be scripted and running prior to starting the Plumtree Administrative Portal.

Installing the Foundation Components

This section describes how to use the installer to install Plumtree Foundation components.

The installer is a graphical, X-windows client when run in interactive mode. If you are running the installer in a remote terminal, make sure the `DISPLAY` environment variable is set correctly.

Using the Installation Wizard

To install Foundation components:

1. Log into the host computer using the Plumtree user created in [Chapter 3, “Pre-Installation Steps.”](#)
2. Copy the installer to a temporary directory and run in as follows:

```
$ ./PlumtreeFoundation_v6-0
```
3. Complete the installation wizard panels as described in the following table and according to the settings you planned when you completed the configuration worksheets provided in [Appendix A, “Installation Worksheets.”](#)



Note: If the installer setting does not apply to your Web application server or to the Plumtree components you are installing, the installer does not display the wizard page.

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Installation Folder	Accept the default: /opt/plumtree.
Upgrade Information	Indicates previously installed versions of portal products.
Upgrade Option	<p><i>All upgrade paths except 4.5 WS SP2 to 6.0:</i></p> <p>Select either Upgrade or New Install. If you select Upgrade, the installer will automatically upgrade all of the components it detects needing an upgrade. The installer will skip most subsequent panels and request only the settings that cannot be extracted from the previous installation (for example, the type of install (.NET or Java) and the Plumtree API Service information.). The XML configuration file structure is also changed. Refer to Appendix B, “XML Configuration Files Upgrade.” for more information.</p> <p>Note: If you want to install a newer version of specific components on a computer with multiple portal components, you should perform a New Install. If you select New Install, you will proceed with the full set of appropriate installer panels.</p> <p><i>4.5 WS SP2 to 6.0 Upgrade Path:</i></p> <p>Select either Upgrade or New Install. If you select Upgrade, the installer skips subsequent configuration panels and instead uses values from a previous installation to fill in the information. The XML configuration file structure is also changed. Refer to Appendix B, “XML Configuration Files Upgrade.” for more information.</p> <p>Note: If you choose to upgrade the portal, the installer upgrades all of the components it detects needing an upgrade. If you want to install a specific component on a computer with multiple portal components, you should perform a New Install.</p>

Wizard Page	Description
Choose Install Set	Select either Complete or Custom . If you select Complete , a full set of Plumtree Foundation components are installed. If you select Custom , you can choose individual portal components to install according to your deployment plan.
Fully Qualified Domain Name and Ports	The fully qualified domain name and port numbers for the Portal Server. Do not include the “http://” prefix. Example domain name: portal.mycompany.com Example non-secure port (http): 80 Example secure port (https): 443
Content Upload Service - Application Port	Indicate either http or https. Enter the port that the Plumtree Content Upload Service should use to handle requests.
API Service - Application Port	Indicate either http or https. Enter the port that the Plumtree API Service should use to handle requests.
External Portal URL	Enter the URL to the Portal Server that browsers outside of the local network would use. Example: http://portal.mydomain.com:80/portal
API Service URL	Enter the URL to the Plumtree API Service including the port number. Example: http://wsserver.mydomain.com:80
Image Service URL	Enter the URL for the Plumtree Image Service, including the port number if it is not 80 or 443: Example: http://web-apps.portal.com:8082/imageserver
Search Host Name and Port	Enter the host name and port for the host computer for Plumtree Search. Example host name: back-end-services.portal.com Example port: 15244
Default Automation Service Computer	Enter the host name for the host computer for the default Plumtree Automation Service. This runs administrative jobs by default. Example: back-end-services.portal.com
Automation Service Port	Enter the Plumtree Automation Service IP port for the automation service being installed. Example: 7777

Wizard Page	Description
Portal Database Connection Information	Specify connection information, such as host name, port, database name or service name, and administrative user information.
Document Repository Service - Application Port	Enter the port for the Document Repository Service being installed.
Document Repository Service Host and Port	Enter the host name and port for the host computer for the Plumtree Document Repository Service. Example host name: back-end-services.portal.com Example port: 8020

Using the Silent Install

The installer can also be run in silent mode. After the installer has been run normally, a **PlumtreeFoundation_silent.properties** file is created. This file can be used to install Foundation components on other hosts without running through the graphical installation wizard and re-entering deployment information.

To run a silent install from the command line:

```
$ ./PlumtreeFoundation_v6-0 -f /opt/plumtree/PlumtreeFoundation_silent.properties.
```

The silent properties file may need to be edited to specify which components to install. Read the comments in the properties file for more information.

Deploying the Image Service

The Plumtree Image Service is a collection of static, non-secure files that should be served by an HTTP server, such as Apache HTTP Server. The Image Service files are located in:

```
$PT_HOME/ptimages/imageserver
```

This directory should be aliased in your HTTP server configuration so that the URL specified for the Image Service when the installer was run is correct. For example, if you were running an Apache HTTP Server on port 8082, and you had specified `http://webserver:8082/imageserver` as your Image Service URL, you might configure Apache HTTP server as follows:

1. In a text editor, open the file
`<apache home>/conf/httpd.conf`
2. Alias your `/opt/plumtree/ptimages/imageserver` directory to `/imageserver/` on the Web server by adding the following:
`Alias /imageserver/ "/opt/plumtree/ptimages/imageserver/"`
3. Create a Directory entry for the `imageserver` directory:
`<Directory "/opt/plumtree/ptimages/imageserver">`
`Options Indexes MultiViews`

```
AllowOverride None
Order allow,deny
Allow from all
</Directory>
```

4. Save `httpd.conf` and exit the text editor.
5. Ensure `/opt/plumtree/ptimages/imageserver` is readable by Apache HTTP Server:

```
$ chmod a+r /opt
$ chmod a+r /opt/plumtree
$ chmod a+r /opt/plumtree/ptimages
$ chmod -R a+r /opt/plumtree/ptimages/imageserver
```

When Apache HTTP Server is restarted, `http://webserver:8082/imageserver/` should point to `/opt/plumtree/ptimages/imageserver/`.



Important: This is provided as an example only. In a production environment the `imageserver` directory should be aliased to the Web server by a knowledgeable Web server administrator.



Starting and Stopping Foundation Services


Foundation components that are implemented as daemons can be started and stopped using provided shell scripts. Prior to starting any of the daemons, the `pthome.sh` script in the Plumtree home directory should be sourced:

```
$ source /opt/plumtree/pthome.sh
```

If you did not install to the default (`/opt/plumtree`) directory, adjust the path as appropriate for your installation. The `pthome.sh` script will set environment variables, such as `$PT_HOME`, used by the Foundation components.

The following table details the procedure for starting and stopping the Foundation component daemons.

Component	Procedure
Plumtree Search	<p>Start: <code>\$PT_HOME/ptsearchserver/6.0/bin/searchserverd.sh start</code></p> <p>Stop: <code>\$PT_HOME/ptsearchserver/6.0/bin/searchserverd.sh stop</code></p> <p> Important: To run searchserverd.sh you should be logged on as the user you were logged in as when you installed the component. When you run the searchserverd.sh, it uses the command line invocation to determine the location of necessary files and directories. The absolute directory path, as shown above, must be used when starting the daemon.</p> <p> Note: Third party software, such as virus scanners and backup software, must not be allowed to operate on Plumtree Search's archive collection files. Use of such systems on Plumtree Search archive collection files can lead to data corruption and failure of Plumtree Search. Configure virus scanning and backup software to exclude all files under <code>ptsearchserver/6.0/common</code>, <code>ptsearchserver/6.0/logs</code>, and <code>ptsearchserver/6.0/index</code>. The Plumtree Search archive collection should be backed up using the "replicate" utility. Refer to the <i>Administrator Guide for Plumtree Foundation</i> for more information on backing up the search collection.</p>
Plumtree Document Repository Service	<p>Start: <code>\$PT_HOME/ptdr/6.0/bin/drserverd.sh start</code></p> <p>Stop: <code>\$PT_HOME/ptdr/6.0/bin/drserverd.sh stop</code></p>
Plumtree Automation Service	<p>Start: <code>\$PT_HOME/ptportal/6.0/bin/automationserverd.sh start</code></p> <p>Stop: <code>\$PT_HOME/ptportal/6.0/bin/automationserverd.sh stop</code></p>
Plumtree API Service	<p>Start: <code>\$PT_HOME/ptws/6.0/bin/apiserviced.sh start</code></p> <p>Stop: <code>\$PT_HOME/ptws/6.0/bin/apiserviced.sh stop</code></p>

Component	Procedure
Plumtree Content Upload Service	<p>Start:</p> <pre>\$PT_HOME/ptupload/6.0/bin/plumtreefileupload.sh start</pre> <p>Stop:</p> <pre>\$PT_HOME/ptupload/6.0/bin/plumtreefileupload.sh stop</pre> <p> Note: After you install Plumtree Content Upload Service, you must import the ptupload.ptc package into the portal. The package is located in \$PT_HOME/ptupload/6.0/serverpackages. Refer to the <i>Administrator Guide for Plumtree Foundation</i> for information on how to import the Plumtree Content Upload Service migration package.</p>

Starting the Portal

To start the portal:

1. Prior to attempting to start the portal, the Foundation database must be scripted and running. For details on how to set up the Foundation database, see
 2. Make sure the Image Service is up and available. For details, see [“Deploying the Image Service” on page 4-4](#).
 3. Start the Plumtree Automation Service, Plumtree Document Repository Service, and Plumtree Search. For details, see [“Starting and Stopping Foundation Services” on page 4-5](#).
 4. Test basic portal startup functionality before starting the portal by running the **diagnostic.sh** script:

```
$ $PT_HOME/ptportal/6.0/bin/diagnostic.sh
```

The tool will generate a list of warnings if there are any issues with the portal startup, and give recommendations on how to correct those issues. Follow the recommendations and correct any issues before starting the portal.
 5. Make sure the application servers are started and configured for use with the portal. Then, deploy the portal application to the application server. For details, see
- The portal should now be running. Follow the instructions in the following section to test the installation.

Testing the Installation

This section describes sequential testing of portal components as you install them. The scope of the testing is limited; it does not cover a wide range of configuration issues and is intended only to provide a level of assurance that individual components were successfully installed.

Before testing the Web UI for connectivity, run **ptverify.sh** to test proper database and Plumtree Search connectivity. The **ptverify.sh** takes two parameters, a user and password in the portal. In a new installation, the Administrator password will be blank, so **ptverify.sh** can be invoked like this:

```
$ $PT_HOME/ptportal/6.0/bin/ptverify.sh Administrator
```

This script tests for proper database and Plumtree Search connectivity and can be run without a working UI.

In addition, you may want to review the settings in the portal **.xml** configuration files in the `ptportal/settings/config` directory. Refer to the *Deployment Guide for Plumtree Application Suite G6* for more information on the **.xml** configuration files.

Testing Connectivity

You can test the connectivity for components after you have installed and started the dependent components. The following table summarizes steps you can take to verify successful installation.

Component Test	Steps
Plumtree Image Service, Plumtree Administrative Portal, Portal Server, and Portal Database	<p>Test the installed components by making sure that the portal user interface displays correctly:</p> <ul style="list-style-type: none"> • Open a browser to: <code>http://admin_portal_server_host:port/portal/server.pt</code> • Log in with user name Administrator and no password. (When you first install the portal, this is the default login.) <p>If the login page displays with icons and you are able to log in and see a default My Page, you have verified that the Plumtree Administrative Portal is running on its Web application server and is able to communicate with the database and that your browser is able to receive images from the Plumtree Image Service.</p>
Plumtree Search	<p>Login to the portal as Administrator, click the Administration tab, and select the Search Server Manager utility from the Select Utility drop-down list. You should then be able to click the Show Status button and get a status message indicating success.</p>
Plumtree Automation Service	<p>Login to the portal as Administrator, click the Administration tab, and select the Automation Server utility from the Select Utility drop-down list. You should see the Plumtree Automation Service you specified during installation. Its status should be listed as Online.</p>

Component Test	Steps
Plumtree API Service	<p>To test the Plumtree API Service, perform a Federated Search:</p> <ul style="list-style-type: none"> • Log in to the portal as Administrator. The default password is blank. • On the displayed My Page, click the Administration tab to go to the Administrative Object Directory and open any folder. • In the Create Object drop-down list within the folder you opened, select Web Service - Search. This displays the Create Web Service page. • Under Search Web Service Settings, set Search URL to: <code>http://wssserver.mydomain.com:11905/ptapi/services/PTSearchServiceSoap</code> • Under Edit Object Settings, click Advanced Settings. This displays the Create Web Service Advanced Settings page. • Under SOAP Encoding Style, select Document/Literal and click Finish. This displays the Save Object page. • Enter a name and description for the search you have created and choose the folder you want the search saved in, then click Save. The Object Saved page displays. • Click Create new Outgoing Federated Search. This displays the Create Outgoing Federated Search page. • Under Edit Object Settings, click Portal to Portal Settings. This displays the Create Outgoing Federated Search Portal to Portal Settings page. • Under Portal Authentication Settings, select Yes, enter guest as your portal identification name, do not enter a portal identification password, and click Finish. This displays the Save Object page. • Enter a name and description for the Federated Search you created and choose the folder you want the Federated Search saved in, then click Save. • Click the Federated Search (<i>not</i> Advanced Search) icon in the upper-right corner of the page. This displays the Search Settings page. • Select the check box next to the Federated Search you created, enter text to search for in the Search for text box, and click Search. <p>If the Plumtree API Service is successfully installed, you see the results of your search, without error messages.</p>

Reviewing Logs

After you install components, you can check log files for errors and warnings. The following table describes the logs created when you install the portal.



Note: Any errors found in any of the other logs listed below are also reported in Plumtree_Foundation_InstallLog.log log file

Log File	Comments
Logs directly under the portal installation directory	
Plumtree_Foundation_InstallLog.log	Logs success or failure of individual installation operations when installing the Portal Server or Plumtree Administrative Portal.
ptdr_deployment.log	Logs success or failure of individual installation operations during Plumtree Document Repository Service installation
ptimages_deployment.log	Logs success or failure of individual installation operations during Plumtree Image Service installation.
ptportal_deployment.log	Logs success or failure of individual installation operations during Plumtree Portal, Administration Portal, or Automation Service installation.
ptsearchserver_deployment.log	Logs success or failure of individual installation operations during Plumtree Search installation.
ptlogger_deployment.log	Logs success or failure of individual installation operations during Plumtree Logging Utilities installation.
ptws_deployment.log	Logs success or failure of individual installation operations during Plumtree API Service installation.
ptlogger_deployment.log	Logs success or failure of individual installation operations during Plumtree Logging Utilities installation.
ptupload_deployment.log	Logs success or failure of individual installation operations during Plumtree Content Upload Service installation.

5

Setting Up the Foundation Database

This chapter describes how to create the Plumtree Foundation database. The procedure involves reviewing, editing, and executing SQL scripts against an Oracle 9i or 10g database. It is expected that the person setting up the Foundation database has a strong understanding of Oracle database system administration.

To set up the Foundation database:

1. Determine whether you will be creating a dedicated or shared Foundation database. In a dedicated database, scripts will be run to create a new database instance specifically for Foundation. In a shared database, Foundation tablespaces will be added to an existing database.
2. Set up environment variables `ORACLE_HOME`, `ORACLE_BASE` and `ORACLE_SID`. For details, see [“Environment Variables” on page 5-1](#).
3. Copy the Foundation SQL scripts into the Oracle directory hierarchy. For details, see [“SQL Scripts” on page 5-2](#).
4. In the SQL scripts, the default SID is PLUM (on Oracle 9i) or PLUM10 (on Oracle 10g). If you choose to use a different SID, modify the SQL scripts as described in [“Modifying the SQL Scripts” on page 5-2](#).
5. If installing to a multi-homed Oracle installation, occurrences of `$ORACLE_HOME` in the SQL scripts need to be replaced with a specific path. For details, see [“Modifying the SQL Scripts” on page 5-2](#).
6. Run the Foundation SQL scripts in the appropriate order. For details, see [“Running the SQL Scripts” on page 5-3](#).

All scripts should be reviewed by the Oracle DBA before setting up the database.



Note: The presentation of certain results on the Portal UI (most noticeably the order of folders in the Knowledge Directory and Administration Object Directory) is controlled by the database collation. On Oracle, database object names are case sensitive by default, with collation semantics controlled by the **NLS_SORT** and **NLS_LANGUAGE** configuration parameters.

Preparing to Create the Database

This section describes steps that need to be taken before the database instance can be created and/or scripted.

Environment Variables

The following environment variables need to be set:

- **ORACLE_BASE:** `ORACLE_BASE` should be set to the root directory of your Oracle installation. For example,

```
$ export ORACLE_BASE=/opt/oracle
```
- **ORACLE_HOME:** `ORACLE_HOME` should be set to the home directory of your Oracle installation. For example, on Oracle 9:

```
$ export ORACLE_HOME=$ORACLE_BASE/ora92
```

On Oracle 10:

```
$ export ORACLE_HOME=$ORACLE_BASE/product/10.1.0/db_1
```

- **ORACLE_SID:** ORACLE_SID should be set to the system ID (SID) of your database instance. The default SID expected in the SQL scripts is PLUM on Oracle 9 and PLUM10 on Oracle 10. If you use a SID other than those defaults, the scripts will need to be edited. For details on editing the scripts, see

To set ORACLE_SID on Oracle 9:

```
$ export ORACLE_SID=PLUM
```

On Oracle 10:

```
$ export ORACLE_SID=PLUM10
```

These variables can be set automatically when your Oracle user logs in by modifying the **.profile** script for your Oracle user. For more information, consult your system administrator.

SQL Scripts

When you install the Portal Server or Plumtree Administrative Portal, the installer generates scripts for creating and populating the database in the following directories:

For Oracle 9i:

```
$PT_HOME/ptportal/6.0/sql/oracle_unix9.2
```

For Oracle 10g:

```
$PT_HOME/ptportal/6.0/sql/oracle_unix10
```

It is recommended that the scripts for your version of Oracle are copied to the following directory:

```
$ORACLE_BASE/admin/$ORACLE_SID/plumtreescripts
```

Modifying the SQL Scripts

While appropriate for a development environment, the Foundation SQL scripts contain default values that may need to be changed for a production environment. For a production environment, all of the Foundation SQL scripts should be reviewed by an Oracle DBA prior to creating and scripting the database.

The following table summarizes the scripts that are affected by changes to key default values:

Changed Default Value	Scripts Affected
SID. The default SID on Oracle 9i is PLUM. On Oracle 10g it is PLUM10.	crdbl_oracle_unix.sql create_plumtree_tablespace_unix.sql initPLUM.ora create_spfile_oracle_unix.sql <i>NOTE: If you change PLUM (or PLUM10) in the scripts, you must also change the file name init-PLUM.ora (or initPLUM10) to contain the SID you replace PLUM with. You may also want to change the names of other scripts that contain PLUM.</i>
system account password. The default password is <i>manager</i> .	run_script_proc_oracle.sql

Changed Default Value	Scripts Affected
Default tablespace names	create_plumtree_tablespace_oracle.sql create_plumtree_user_oracle.sql create_tables_oracle.sql
ORACLE_HOME. The scripts use the environment variable \$ORACLE_HOME. In a multi-homed environment this should be replaced with a specific path.	crdbl_oracle_unix.sql create_plumtree_tablespace_oracle_unix.sql create_spfile_oracle_unix.sql initPLUM.ora (initPLUM10 for 10g) run_script_proc_oracle.sql

Running the SQL Scripts

This section describes how to run the SQL scripts to create the Foundation database. Depending on how you are implementing the Foundation database, you should follow the instructions in one of the following sections:

- In a dedicated database, run scripts to create a database instance specifically for the Foundation database. Follow the instructions in [“Dedicated Foundation Database” on page 5-3](#).
- In a shared database, run scripts to create tablespaces for the Foundation database within an existing database instance. Follow the instructions in [“Shared Foundation Database” on page 5-5](#).

Dedicated Foundation Database

To create and set up the Foundation database:



Note: Throughout these instructions it is assumed that the SID is PLUM (Oracle 9i) or PLUM10 (Oracle 10g). If this is not the case, modify these instructions appropriately. Consult your Oracle DBA for more information.

1. Log into the Foundation database host computer as the owner of the Oracle system files.
2. Verify that ORACLE_BASE, ORACLE_HOME and ORACLE_SID are set appropriately. For details, see [“Environment Variables” on page 5-1](#)

3. Create the **sys** password:

For Oracle 9i:

```
$ $ORACLE_HOME/bin/orapwd file=$ORACLE_HOME/dbs/orapwPLUM password=password
```

For Oracle 10g:

```
$ $ORACLE_HOME/bin/orapwd file=$ORACLE_HOME/dbs/orapwPLUM10 password=password
```

4. Create the PLUM or PLUM10 directory under **\$ORACLE_BASE/oradata**:

For Oracle 9i:

```
$ mkdir -p $ORACLE_BASE/oradata/PLUM
```

For Oracle 10g:

```
$ mkdir -p $ORACLE_BASE/oradata/PLUM10
```

5. Create a link to **initPLUM.ora** or **initPLUM10.ora** in **\$ORACLE_HOME/dbs**

For Oracle 9i:

```
$ cd $ORACLE_HOME/dbs
$ ln -s $ORACLE_BASE/admin/PLUM/plumtreescripts/initPLUM.ora
```

For Oracle 10g:

```
$ cd $ORACLE_HOME/dbs
$ ln -s $ORACLE_BASE/admin/PLUM10/plumtreescripts/initPLUM10.ora
```

6. If this is a re-creation of a database or a retry of a prior failed attempt, delete the old database file. Ensure the database is not running, and then:

```
$ rm $ORACLE_BASE/oradata/$ORACLE_SID/*.*
```

7. From **\$ORACLE_BASE/admin/\$ORACLE_SID/plumtreescripts**, start **sqlplus**:

```
$ cd $ORACLE_BASE/admin/$ORACLE_SID/plumtreescripts
$ sqlplus /nolog
```

Your prompt will change to **SQL>**.

8. Run the **crdb1_oracle_unix.sql** script to create and start the new database instance:

```
SQL> @crdb1_oracle_unix.sql
```

This script should generate no errors. The database should now be running. When the script completes, verify the following data files have been created in **\$ORACLE_BASE/oradata/\$ORACLE_SID**:

- systPLUM.dbf (Oracle 9i)
- systPLUM10.dbf (Oracle 10g)
- undo1A.dbf
- temp1A.dbf (single disk installation only.)

Output from the script is saved in the file **crdb1.lst** in the **plumtreescripts** directory.

9. From **sqlplus**, run the **crdb2_oracle_unix.sql** script to create tablespaces, create the portal database user, and perform low level database tuning.

```
SQL> @crdb2_oracle_unix.sql
```

This script can take a significant amount of time to complete. The following errors may be generated:

```
ORA-00942 table or view does not exist
ORA-1432/ORA-1434 public synonym to be dropped does not exist
```

These errors are acceptable. Any other errors are not acceptable.

When the script completes, verify the following data files have been created in **\$ORACLE_BASE/oradata/\$ORACLE_SID**:

On Oracle 9i:

- PLUMtbl1.dbf
- PLUMtmp1.dbf
- PLUMidx1.dbf

On Oracle 10g:

- PLUM10tbl1.dbf

- PLUM10tmp1.dbf
- PLUM10idx1.dbf

Output from the script is saved in the file **crdb2.lst** in the **plumtreescripts** directory.

10. Run the **init_plumtree_db_oracle.sql** script to create Foundation tables, indexes, and stored procedures. Exit **sqlplus** and log back in as the portal database user you just created. You should still be in the **\$ORACLE_BASE/admin/\$ORACLE_SID/plumtreescripts** directory:

```
$ sqlplus portal_database_user/password
```

The prompt should be **SQL>**. Now, run the **init_plumtree_db_oracle.sql** script:

```
SQL> @init_plumtree_db_oracle.sql
```

Output from the script is saved in the following files in the **plumtreescripts** directory:

- create_tables.lst
- stored_procs_oracle.lst
- load_seed_info.lst
- postinst.lst

11. If desired, create an Oracle SPFILE. Refer to Oracle documentation for the benefits of using an SPFILE.

Exit **sqlplus** and log back in using the **/nolog** parameter:

```
$ sqlplus /nolog
```

The prompt should be **SQL>**. Now, run the **create_spfile_oracle_unix.sql** script:

```
SQL> @create_spfile_oracle_unix.sql
```

Shared Foundation Database

The following steps assume you have an existing database instance already running. To create a shared Foundation database:

1. Log into the Foundation database host computer as the owner of the Oracle system files.
2. Verify that **ORACLE_BASE**, **ORACLE_HOME** and **ORACLE_SID** are set appropriately. For details, see [“Environment Variables” on page 5-1](#)
3. Connect to your database as a user with sysdba rights. From **\$ORACLE_BASE/admin/\$ORACLE_SID/plumtreescripts**, start **sqlplus**:

```
$ cd $ORACLE_BASE/admin/$ORACLE_SID/plumtreescripts
$ sqlplus /nolog
```

Your prompt will change to **SQL>**.

```
SQL> conn / as sysdba
```

4. Run **create_plumtree_tablespace_unix.sql** to create the Foundation tablespaces:

```
SQL> @create_plumtree_tablespace_unix.sql
```

5. Run **create_plumtree_user_oracle.sql** to create the schema user the portal will use:

```
SQL> @create_plumtree_user_oracle.sql
```

6. Run the **init_plumtree_db_oracle.sql** script to create Foundation tables, indexes, and stored procedures. Exit **sqlplus** and log back in as the portal database user you just created. You should still be in the **\$ORACLE_BASE/admin/\$ORACLE_SID/plumtreescripts** directory:

```
$ sqlplus portal_database_user/password
```

The prompt should be SQL>. Now, run the **init_plumtree_db_oracle.sql** script:

```
SQL> @init_plumtree_db_oracle.sql
```

Output from the script is saved in the following files in the plumtreescripts directory:

- create_tables.lst
- stored_procs_oracle.lst
- load_seed_info.lst
- postinst.lst

6

Post-Installation Tasks

This chapter provides a summary of references for post-installation tasks you can perform to complete your deployment.

Task	Reference
1. Verify or troubleshoot installation.	“Testing the Installation” on page 4-7
2. Verify your Web application servers have been configured correctly for your portal deployment.	“Configuring a Web Application Server” on page 8-1
3. Install and test Plumtree Server products if they are part of your deployment.	<i>Installation and Upgrade Guide for Plumtree Collaboration</i> <i>Installation and Upgrade Guide for Plumtree Publisher</i> <i>Installation and Upgrade Guide for Plumtree Studio</i>
4. If you upgraded from a previous version, become familiar with new and changed features.	<i>Release notes</i>
5. Localize your portal.	<i>Deployment Guide for Plumtree Application Suite</i> <i>Administrator’s Guide for Plumtree Foundation</i>
6. Implement security for your portal.	<i>Deployment Guide for Plumtree Application Suite</i> <i>Administrator’s Guide for Plumtree Foundation</i>
7. Create the portal objects that enable you to manage users, groups, and documents.	<i>Administrator’s Guide for Plumtree Foundation</i>
8. Install additional portlets and Crawler Web Services to support document types used in your portal.	Plumtree Product Center http://portal.plumtree.com If you do not already have an account, send mail to support@plumtree.com .
9. If you want to publish to your browsing users a simpler portal URL create an HTTP redirection page.	Appendix C. “Redirecting a URL”
10. Become familiar with the resources available in the Plumtree Support Center. You might find the Knowledge Base helpful. For example, if your deployment supports Lotus Notes users, you might want to search for "Lotus Notes" to display KB articles relevant to Lotus Notes support.	Plumtree Support Center http://portal.plumtree.com If you do not already have an account, send mail to support@plumtree.com .

7

Upgrading to Foundation 6.0

The following table summarizes the supported database upgrade path for Plumtree Foundation.

Upgrade Path	Upgrade References
6.0 to 6.0 SPI	Follow the procedures in this chapter.
5.0.4J to 6.0	Follow the procedures in this chapter.
4.5 WS SP2 Solaris or 5.03J to 6.0	Follow the procedures in the <i>Upgrade Guide for the Plumtree Corporate Portal 5.0.4J</i> to upgrade your portal to 5.0.4J. Then, follow the procedures in this chapter to upgrade to 6.0

This chapter discusses:

- [“Upgrading from Foundation 5.0.4J to Foundation 6.0”](#)
- [“Upgrading from Foundation 6.0 to Foundation 6.0 SPI”](#)

Upgrading from Foundation 5.0.4J to Foundation 6.0

This section describes how to upgrade from Foundation 5.0.4J to Foundation 6.0.

Prerequisite Steps

To upgrade to, the following general steps are completed:

1. Read the product release notes for a brief summary of features introduced or changed in releases 6.0 or 5.0.4J.
2. Ensure you have completed pre-installation steps. For details, see [“Pre-Installation Steps” on page 3-1](#)
3. Verify that your Web application server is configured for portal deployment. For details, see [“Configuring a Web Application Server” on page 8-1](#)
4. Install the Administrative Portal by running the 6.0 portal installer. It is important that you do not attempt to start the Administrative Portal before you have upgraded the database. For details, see [“Installing the Foundation Components” on page 4-1](#).
5. Upgrade the database to 6.0. For details, see [“Plumtree Database Upgrade Tool” on page 7-1](#).
6. Run the installer on each host computer running portal components to be upgraded. For details, see [“Installing the Foundation Components” on page 4-1](#).

Plumtree Database Upgrade Tool

The Plumtree Database Upgrade Tool upgrades a 5.0.4J database to version 6.0 specifications.

Pre-Upgrade Requirements

Before you run the Plumtree Database Upgrade Tool:

- If necessary, migrate your Oracle database to the supported versions of Oracle. For details on supported versions, see [“Hardware and Software Requirements” on page 3-1](#). This step may be complex and time-consuming. Your enterprise DBA should perform this step several days or weeks before you begin the next upgrade steps.



Note: When you upgrade to Oracle 9i or 10g, ensure that the new database character set is UTF8 and the new database national character set is ALI6UTF16. Plumtree 6.0 requires that Oracle databases be created with a UTF8 character set and a ALI6UTF16 national character set.

- Install the Plumtree Administrative Portal for portal version 6.0.

Duplicate Document Names Scripts

In earlier versions of the portal, document names were case sensitive; a document name in all caps would be considered a different document than one with the same name in all lower case. In Foundation 6.0, document names are case insensitive, which means document names considered unique in earlier versions of the portal may now be considered duplicates.

If there is a concern that your Oracle database contains duplicate document names, Plumtree provides two scripts that you can run before you run the Database Upgrade Tool. It is important to note that running these scripts is optional and that they support Oracle databases only. The scripts are located in `$PT_HOME/ptportal/6.0/sql`.

- **find_dup_doc_names_oracle.sql** – This script finds duplicate document names in the database and creates new names for the duplicates by appending the string “(dup x)”, where “x” is the number of the duplicate. The new document names are stored in a new table (PTCARDS_NEWNAMES), so the original PTCARDS table is left untouched. The script can only handle document names that are duplicated five or fewer times.
- **fix_dup_doc_names_oracle.sql** – This script updates the duplicate document names in the PTCARDS table with the new card names stored in PTCARDS_NEWNAMES. It then drops the PTCARDS_NEWNAMES table. It is required that **find_dup_doc_names_oracle.sql** be run first before running this script.

Increase the Size of the Tablespace

If your tablespace is not set to autoextend, you may need to increase the space available to the datafile. Foundation G6 can require over twice the storage required by Portal 5.x.

Running the Plumtree Database Upgrade Tool

The command line Plumtree Database Upgrade Tool is used to upgrade a portal database to 6.0 specifications.

To successfully perform an upgrade, you must supply data needed by the upgrade process (such as the location of various files). You supply this data through a text file. This text file is the **upgradedata.properties** file and is created in:

```
$PT_HOME/settings/portal/upgradedata.properties
```

The first time you run the Plumtree Database Upgrade Tool, it creates the `upgradedata.properties` text file that contains descriptions of the required data. You edit the `upgradedata.properties` file in a text editor. After entering all necessary parameters, you run the Plumtree Database Upgrade Tool a second time. The Plumtree Database Upgrade Tool reads the parameters from the `upgradedata.properties` file, and performs the upgrade.



Note: Your system must be properly configured to run Plumtree in order to use this application, as it relies on your Plumtree configuration to know how to connect to the database and so forth.

1. Run the Plumtree Database Upgrade Tool from `$PORTAL_HOME/bin/dbupgradetool.sh`.
2. This script takes two parameters of Admin User Name and Password:
 - Admin User Name - type the name of the 5.0.4J Administrator user created upon installation (not another user in the Administrators group). The default name is "Administrator," but you may have changed the name for security purposes after installation.



Note: The Admin User Name is case sensitive.

- Password - type the password for the Administrator user. If this user has an empty password, do not type anything.
3. Provide values for the parameters in the `upgradedata.properties` file. You may not see all of these parameters because you see only the parameters associated with the types of objects in your portal.



Note: File paths are in the format `/directory/subdir/filename.xxx` and cannot have a space at the end of the path nor quotes around the path name. A correct example would be:
`File_Path = /opt/plumtree/ptedir/yourfilename.ptc`

- LOG_FILE_PATH - Enter the path to the log file to be created by the upgrade. The upgrade writes status information to this file.
- SQL_FILE_PATH - Enter the path to the SQL file to be created by the upgrade. The upgrade creates a SQL script in this file that corresponds to the work done by the upgrade. This parameter is optional. Leave it blank to indicate that no SQL file should be generated.



Note: The Plumtree Database Upgrade Tool modifies data regardless of whether it is also generating an SQL Script.

4. Run the Plumtree Database Upgrade Tool again to begin upgrading the database. The upgrade can run for a few seconds or a few hours, depending on the size of your database. If the Plumtree Database Upgrade Tool encounters errors or data inconsistencies, it does not stop. Instead it logs the errors to the file specified in Step 3.
5. When the database upgrade completes, you are notified of the status. If the upgrade completed successfully (without errors), skip to Step 7.



Note: If PTGROUPMEMBERSHIP has a materialized view you may see an error regarding inability to drop a view. This can be ignored.

6. If there were errors, you should examine the log file, identify solutions, restore the database to its previous state, fix the problems, and re-run the Plumtree Database Upgrade Tool.



Note: You must restore the database to its original 5.0.4J state before you re-run the Plumtree Database Upgrade Tool. The Plumtree Database Upgrade Tool modifies the database to determine all possible errors. Therefore, even if the upgrade did not complete successfully, the database is at least partially upgraded to 6.0.

7. If you changed the database credentials, change them back to use the Plumtree database user.
8. Continue with the instructions Exporting and Re-importing the Data, Loading the Stored Procedures, and Updating System-Specific Parameters that follow this section.

Exporting and Re-importing the Data

You must export and re-import the database data into newly created tables after the database has been upgraded. To do this, export all the data from the database, run the Plumtree database creation scripts, and re-import the data into the new tables.

1. Export the data using the Oracle export utility. If your Plumtree schema owner is "plumdbuser", type:

```
exp plumdbuser/pass FILE=plumdb.dmp OWNER=plumdbuser GRANTS=y ROWS=y COMPRESS=y
```



Note: Ensure that the National Character Set of the database is ALI6UTF16. If it is not, alter or recreate the database so that it is.

2. Drop the Plumtree schema owner. If your Plumtree schema owner is "plumdbuser", in sqlplus type:

```
SQL> drop user plumdbuser cascade;
```

3. Create the Plumtree schema owner and grant the user connect, resource and dba privileges. If your Plumtree schema owner is "plumdbuser" and your tablespaces have the default names, type:

```
create user plumdbuser
  identified by [password]
  default tablespace PLUMTABLE
  temporary tablespace PLUMTEMP;
grant connect, resource to plumdbuser;
grant db to plumdbuser;
alter user plumdbuser quota unlimited on PLUMTABLE;
alter user plumdbuser quota unlimited on PLUMINDEX;
alter user plumdbuser quota unlimited on PLUMTEMP;
```

4. Run the Plumtree database table creation SQL script create_tables_oracle.sql. This script is generated by the Portal Server installer and is located in the \$PT_HOME/ptportal/6.0/sql/oracle_unix9.2 or \$PT_HOME/ptportal/6.0/sql/oracle_unix10 directory.
5. Import the data using the Oracle import utility. If your Plumtree schema owner is "plumdbuser", type:

```
imp plumdbuser/pass FILE=plumdb.dmp FROMUSER=plumdbuser TOUSER=plumdbuser
IGNORE=y
```



Note: You may receive errors that look like the following:

```
IMP-00019: row rejected due to ORACLE error 1401
IMP-00003: ORACLE error 1401 encountered
```


ORA-01401: inserted value too large for column

If so, refer to the troubleshooting section in the *Upgrade Guide for Plumtree Foundation 4.5WS to 6.0* for ORACLE error 1401. This error must be corrected manually.



Note: During import, you may encounter a few errors that look like the following. These errors are harmless and may be ignored:

ORA-28667: USING INDEX option not allowed for the primary key of an IOT

Loading the Stored Procedures

Add the new Plumtree stored procedures to the database by running the Plumtree stored procedure creation SQL script. This script is generated by the Portal Server or Automation Service installer and is located in the \$PT_HOME/ptportal/6.0/sql/oracle_unix9.2 or \$PT_HOME/ptportal/6.0/sql/oracle_unix10 directory:

- stored_procs_oracle.sql

Updating System-Specific Parameters

Run the system-specific post-installation SQL script:

- postinst_oracle.sql.

This script is generated when you install the Administrative Portal and is located in the \$PT_HOME/ptportal/6.0/sql/oracle_unix9.2 or \$PT_HOME/ptportal/6.0/sql/oracle_unix10 directory. The values in this script depend on the parameters you entered during the installation of the 6.0 Administrative Portal, and therefore you must use a version that was generated for the installation of the specific system being upgraded, not one copied from another system.

This step is important if the database that you upgraded was copied from a different system, as the script corrects system-specific database entries to be appropriate to the upgraded system. In particular, a copied database refers to the Search Server of the database's source system; running the upgraded portal with that reference in its database may cause the portal to corrupt the data in the source Search Service.

Post Database Upgrade Steps

1. Verify your installation. For details, see [“Testing the Installation” on page 4-7](#).
2. Run a Search Repair operation. BEA highly recommends this whether or not you chose to clear the status of currently indexed items when you ran the Database Upgrade Tool (by default, the status of currently indexed items is cleared). To run a Search Repair operation:
 - a. Set the Next Repair Date in the Search Service Manager utility. You can find this utility in the portal administrative hierarchy. To schedule an immediate repair, set the date for today and the time to be in the past.
 - b. Click **Apply** then **Finish**.
 - c. Start any of the Search Update jobs.
3. Review post-installation steps to determine your next steps. For details, see [Chapter 6, “Post-Installation Tasks.”](#)

Upgrading from Foundation 6.0 to Foundation 6.0 SPI

This section describes how to upgrade from Foundation 6.0 to Foundation 6.0 SPI.

When planning your upgrade process, you should take into account testing, uptime requirements and synchronization with staging and development systems.

Upgrading from Foundation 6.0 to Foundation 6.0 SPI requires that you run the `upgrade6.0to6.0.SPI_oracle.sql` database script on the portal database in addition to upgrading the portal software itself. The database script is installed with the Administrative Portal server. The basic upgrade steps can be summarized as follows:

1. Upgrade software on one Administrative Portal server to version 6.0 SPI.
2. Run the `upgrade6.0to6.0.SPI_oracle.sql` database upgrade script on the portal database.
3. Upgrade all other components such as automation services, image services, and other administrative portal servers.

Steps 2 and 3 can be reversed if desired. Whatever order you choose, you must install at least one version of 6.0 SPI administrative portal server before running the database scripts so as to get a copy of the database upgrade script. Also, although each administrative portal server will have a copy of the upgrade script, you only need to run the script once.

Please note that each of the basic steps listed above have other sub-steps that are described in the procedure below.

1. Upgrade software on one Administrative Portal server to version 6.0 SPI.
 - a. Verify that the machine infrastructure is up to version 6.0 SPI specifications. For details, see [Chapter 3, “Pre-Installation Steps.”](#)
 - b. Install the Administrative Portal server component. For details, see [“Installing the Foundation Components” on page 4-1](#).
2. Run the database upgrade script on the portal database.
 - a. Back up the portal database.
 - b. Locate the `upgrade6.0to6.0.SPI_oracle.sql` script in the installation folder of the version 6.0 SPI Administrative Portal server.
 - c. Run the database upgrade script.
3. Upgrade all other components such as automation servers, image servers, and other administrative portal servers.
 - a. Verify that the machine infrastructure for the other Foundation system machines is up to version 6.0 SPI specifications. For details, see [Chapter 3, “Pre-Installation Steps.”](#)
 - b. Install the Image Service component(s) and deploy them to a Web server. For details on installing all Foundation components, see [“Installing the Foundation Components” on page 4-1](#).
 - c. Install the Plumtree Search component.
 - d. Install the other Portal and Administrative Portal server component(s), such as Collaboration and Analytics.
 - e. Install the Automation Service component(s).
 - f. Install the WS Server component.
 - g. Install other Foundation components as needed.

4. Test the basic Foundation system to verify the installation of the software. For details, see [“Testing the Installation” on page 4-7](#)
5. Check log files for errors and warnings. For details, see [“Reviewing Logs” on page 4-10](#)
6. Apply customizations as needed.
7. Test customizations to verify the application of the customizations.

8

Configuring a Web Application Server

This chapter provides information on configuring Web application servers for use with the portal. It contains the following main sections:

- [“Install Apache HTTP Server” on page 8-1](#)
- [“Configuring WebLogic” on page 8-4](#)
- [“Configuring WebSphere” on page 8-6](#)
- [“Configuring Tomcat” on page 8-8](#)

Throughout this chapter, the term “Portal Server” stands for all portal components that run on a Web application server. This simplifies the presentation and there is no significant difference, in the context of this chapter, between the different components. The components that run on a Web application server are:

- Plumtree Administrative Portal
- Portal Server
- Plumtree Image Service
- Plumtree API Service
- Plumtree Content Upload Service

Install Apache HTTP Server

If you are using Apache HTTPd in front of your Web application server you must install it at this point. If you are using IBM WebSphere, skip this step since IBM HTTP Server should have been installed when you installed WebSphere.

Apache HTTP Server is available on the Plumtree installation media. It is a redistribution of open-source software which is available from the Apache Foundation Web site at <http://www.apache.org>. If you have customer support questions, concerns, and issues relating to Apache, this Web site is a good place to begin your research.

The version of Apache HTTP Server included with the Plumtree installation media is 2.0.53. It is installed into `/opt/httpd`. The distribution includes the Apache module for SSL support, which is enabled by default. Apache requires that Open SSL be installed under `/usr/local/ssl`. It also includes **mod_wl_20** for connecting to the WebLogic application server or **mod_jk** for connecting to the Tomcat application server. Refer to the README file located on the Plumtree release media for more information.

Choose the distribution file appropriate to your OS from the Plumtree installation media:

- **`httpd-2.0.53.<OS>.v2.tar.gz`**

This distribution includes a demo certificate that enables SSL. You must install a real certificate and change the SSL parameters. Refer to <http://www.apache.org> for instructions.

The information listed below is used to configure Apache using the Plumtree configuration script:

Property	Default Value
SERVER_HOST_NAME	\$HOSTNAME
SERVER_IP_ADDR	0.0.0.0
SERVER_HTTP_PORT	80
SERVER_ADMIN_EMAIL	root@{\$SERVER_HOST_NAME}
HTTPD_USER	nobody
HTTPD_GROUP	plumtree
APPSERVER	(none)

The values in the table above can be set by editing the **ptsetup.sh** file in your distribution's `bin` directory. This step is covered in the procedures below.

1. Verify that OpenSSL 0.9.6 or higher has been installed in the `/usr/local/ssl` directory. You can do so by typing the following commands as the 'plumtree' user:

```
$ /usr/local/ssl/bin/openssl version
```

The following should display:

```
OpenSSL 0.9.6g 9 Aug 2002
```

2. Copy the compressed installer file to `/tmp/plumtree` by typing:

```
$ cd /tmp/plumtree
```

```
<install_root>/thirdparty/apache/httpd.2.0.53.linux.tar.gz .
```

3. Uncompress the installer by typing (note that `<OS>` should be replaced with what is appropriate for your OS):

```
$ gunzip httpd-2.0.53.<OS>.v2.tar.gz
```

4. Create the `/opt/httpd` directory as 'super user', assign the 'plumtree' user access to the directory by typing:

```
# cd /opt
```

```
# mkdir httpd
```

```
# chown -R plumtree:plumtree /opt/httpd
```

5. Exit as 'super user'.

6. As the 'plumtree' user, untar the Apache **tar** file by typing (note that `<OS>` should be replaced with what is appropriate for your OS):

```
$ cd /opt
```

```
$ tar xvf /tmp/plumtree/httpd-2.0.53.<OS>.v2.tar
```

7. Run the **ptsetup.sh** script and change the appropriate customizable comments by typing:

```
$ cd /opt/httpd
```

```
$ vi bin/ptsetup.sh
```

8. Run the **ptsetup.sh** script to generate your configuration files by typing:

```
$ bin/ptsetup.sh
```

9. As the root user, start Apache HTTPd by typing:

```
# cd /opt/httpd
# bin/apachectl start
```

You must do this as the root user in order to bind to port 80 and 443. Once the daemon binds to these privileged ports, it continues to run as the 'nobody' user. This is the most secure way to run Apache HTTPd.

10. In a Web browser, visit your Apache HTTPd and ensure it is running:

```
http://<your machine name>:<your machine port>/index.html.en
```

You receive a welcome screen that displays the Apache logo.

Configuring WebLogic

If you are using BEA WebLogic 8.1 with the Portal Server, you must do the following:

- Before running the Portal Server, make sure that the WebLogic Java Virtual Machine (JVM) memory settings are adequate for supporting it (see the next section).
- After installation manually deploy the Portal Server to WebLogic (see [“Manual Deployment to WebLogic” on page 8-4](#)).

Setting WebLogic JVM Parameters

The default WebLogic startup script is `startWebLogic.sh`. It is located in the top level folder for the WebLogic *domain* where the portal is being run. These scripts contain a line for setting JVM heap size and other memory parameters. To set the Java heap for the Portal Server, you must edit the startup file under the Portal Server's WebLogic domain. To set JVM memory parameters in one of the files:

1. Locate the `startWebLogic.sh` file and create a copy of it so as to preserve the original.
2. Modify the variables in the copy you created as follows:
 - `WL_HOME`="<absolute path to the weblogic81 directory>"
For example `"/opt/boa/weblogic81"`
 - `JAVA_VENDOR`="bea"
 - `PRODUCTION_MODE`="true"
 - `JAVA_HOME`="<absolute path to the JRockit jvm>"
For example: `"/opt/boa/jrockit81sp4_142_05"`
 - `SERVER_NAME`="<name of the weblogic server you selected during installation>" For example: `"myserver"`
 - `JAVA_VM`= Do not need to set this variable; comment out this line.
 - `JAVA_OPTIONS`="<add the -Xnoopt option to the options that script sets by default>"
For example: `"${JAVA_OPTIONS} -Xnoopt"`
 - `MEM_ARGS`= `"-Xgc:gencon -Xms:<minimum heap space> -Xmx:<maximum heap space> -Xns:<new generation space>"`
For example: `"-Xgc:gencon -Xms:450m -Xmx:450m -Xns:192m"`

These are suggested initial values. You may tune them as needed.

3. Save and close the file.

Manual Deployment to WebLogic

To manually deploy the Portal Server to WebLogic:

1. Ensure that the WebLogic application server is running.
2. Start your Web browser, and navigate to the following URL:
`http://myhostname:7001/console`
3. Enter your BEA WebLogic administrative username and password. These values were established during the install of BEA WebLogic.

4. The next page is the **Administrative Console**. The left pane is a navigation pane that functions similar to the folder system used in Windows Explorer.
5. You click on the "+" signs next to the names to expand each folder. Navigate to the following folder: **your_domain_name | Deployments | Web Application Modules**.
6. Select the **Web Application Modules** folder name. The right pane on the Web browser loads a new page with the header **your_domain_name | Web Applications**. Notice there are navigational tabs near the top of the pane.
7. Click the **Configuration** tab.
8. The **Configuration** tab contains the link **Deploy a new Web Application Module...** Click this link.

The following page asks for the location of the **.war** file to deploy, showing a representation of the computer's file system on which the BEA WebLogic installation resides. Navigate the file system to the location: `/opt/plumtree/ptportal/6.0/webapp`.

To get to the root folder, click on the link that displays the computer's name. The link `"/` appears under it. Click this link to navigate to the root folder of the computer.

9. Once you have navigated to `/opt/plumtree/ptportal/6.0/webapp`, the **portal.war** file should appear with a radio button next to it. Select the radio button and click **Target Module**, which is located on the lower right side of the pane.
10. The next page that loads asks you to review your changes. It is important that you leave the **Name** under the Identity section to its default value.
11. Click **Deploy**. You may have to wait while WebLogic installs the **portal.war** file.
12. The next page displays once the installation is performed, under the heading **your_domain_name > Web Applications > portal**.

At this point, WebLogic is trying to deploy the **portal.war** file. The **Deploy** tab is displayed, indicating the status of the deployment and how many seconds have elapsed. The page automatically refreshes at a constant interval. Look for the status table with the success message under the **Status of Last Action** column. This indicates the successful installation and deployment of the Plumtree portal.

13. Stop and then restart the WebLogic application server for the Portal Server.

Configuring WebSphere

If you are using IBM WebSphere 6.0.1:

- Before you install the Portal Server, you must set JVM memory and other parameters for the Portal Server (see the next section).
- After installation, you must manually deploy the Portal Server to WebSphere (see [“Manual Deployment to WebSphere” on page 8-6](#)).

Setting JVM Parameters

Before you install the Portal Server, you must set the Java heap size for the Portal Server. To set this parameter:

1. Start your Web browser, and navigate to the WebSphere Administrative Console.
2. Under the WebSphere Administrative Domain, click **your_node_name | Servers | Application Servers**.
3. Click the application server that is running with the portal.
4. In the **Additional Properties** area, click **Process Definition**.
5. In the **Additional Properties** area, click **Java Virtual Machine**.
6. In the **Java Virtual Machine** page:
 - a. Set Initial java heap size to 512 MB.
 - b. Set Maximum java heap size to 1200 MB

The values given in **a** and **b** are only suggested initial values. They are not required, and they may require tuning.
7. Scroll down so that you can see the **Apply** button and click it.
8. Click **Save** in the tool bar at the top of the console to save your changes.
9. In the **Save to Master Configuration** window, click **Save** again.
10. Close the console. Stop and then restart the Web application server.

Manual Deployment to WebSphere

To manually deploy the Portal Server to WebSphere:

1. Start your Web browser, and navigate to the WebSphere Administrative Console.
2. Enter a username and password in production mode, or any user ID in development mode, and click **OK**.
3. In the left pane of the WebSphere Administrative Console is a navigation tree. Expand it in the following way: **<node name> | Applications | Install New Application**.
4. Click **Install New Application**.
5. In the right pane, you are asked to specify the path to the EAR/WAR/JAR module.
 - a. For **Path**, click the **Server path** radio button and enter the location of the **portal.war** file. Type a UNIX-style path, for example:
`/local/test/ptportal/6.0/webapp/portal.war.`
 - b. For **Context root**, type `portal`.

6. Click **Next**. WebSphere installs the application. This may be a relatively long operation.
7. The **Preparing for the application installation** page appears. Accept the defaults except the one in the **Virtual Host** area. In the **Virtual Host** area, select the **Do not use default virtual host name for web modules** radio button.
8. Click **Next**.
9. The next page displays **Application Security Warnings**. Scroll down so that you can see the **Continue** button and click it.
10. In the **Install New Application Step 1** page, accept the defaults except for the **Application Name** setting, which should be changed to `PlumtreePortal`.
11. Click **Next**.
12. In the **Install New Application Step 2** page, accept the defaults and click **Next**.
13. In the **Install New Application Step 3** page, accept the defaults and click **Next**.
14. In the **Install New Application Step 4** page, scroll down so that you can see the **Finish** button and click it.
15. A series of messages display on the next page as the installation progresses. When the installation is complete, the following message displays:
`Application PlumtreePortal installed successfully`
Below this status message there is a **Save to Master Configuration** link. Click this link.
16. A set of buttons display on the next page. Click the **Save** button.
17. In the left pane, navigate to **Applications | Enterprise Applications**.
18. Click **Enterprise Applications**.
19. Select the checkbox next to the **PlumtreePortal** application.
20. Click **Start**.

Configuring Tomcat

If you are using Jakarta Tomcat 5.0.2.8:

- Before installing the Portal Server, make sure that your Java heap memory settings are adequate (see the next section).
- You must manually deploy the Portal Server to Tomcat (see [“Manual Deployment to Tomcat” on page 8-8](#)).

Setting Java Heap Size

For Tomcat, the size of the Java heap is set through the system environment variable JAVA_OPTS.

You set JAVA_OPTS in Tomcat's `setenv.sh` file (for the Tomcat console).

For the Portal Server, set JAVA_OPTS as follows:

```
JAVA_OPTS="-server -Xms450M -Xmx768M -XX:+UseParallelGC  
-XX:NewSize=192M -XX:MaxNewSize=192M -XX:SurvivorRatio=8"
```

In addition, note that Tomcat is not recommended for very large configurations. Tomcat does not scale as well per concurrent user as does WebLogic or WebSphere nor is it as efficient if the CPU is heavily loaded.

Manual Deployment to Tomcat

To deploy the Portal Server to Tomcat:

1. Navigate to the following Tomcat folder:

```
Tomcat_installation_directory/conf/Catalina/localhost
```

2. In this folder, create an XML file called **portal.xml** with the following contents:

```
<Context path="/portal"  
docBase="portal_install_folder/ptportal/6.0/webapp/portal.war"  
unpackWAR="false"> </Context>
```

3. Save the XML file you created.
4. Restart the Tomcat application server.

A

Installation Worksheets

This appendix contains worksheets for entering the installation information required by individual portal components.

- [“Installation Worksheet” on page A-2](#)
- [“Plumtree Administrative Portal Worksheet” on page A-4](#)
- [“Plumtree Automation Service Worksheet” on page A-6](#)
- [“Plumtree Document Repository Service Worksheet” on page A-7](#)
- [“Plumtree Image Service Worksheet” on page A-8](#)
- [“Portal Server Worksheet” on page A-9](#)
- [“Plumtree Search Worksheet” on page A-11](#)
- [“Plumtree Content Upload Service Worksheet” on page A-12](#)

Installation Worksheet

The following worksheet lists the properties for which you enter values the first time you use the portal installer.

Property		Value
External Portal URL		
Default Plumtree Automation Service computer		
Plumtree Automation Service Port		
Plumtree Image Service URL		
Plumtree API Service URL		
Plumtree Search host name		
Plumtree Search port		
Plumtree Document Repository Service host name		
Plumtree Document Repository Service port		
Plumtree Content Upload Service port		
Portal database Oracle	Host name	
	Port	
	Service name	
	Schema user	
	Schema password	
WebLogic Information:		
	WebLogic Home	
	WebLogic Host Name	
	WebLogic Port	
	WebLogic Domain Home	
	WebLogic Domain	
	WebLogic Server	
	WebLogic Admin User	
	Admin User Password	
WebSphere Information:		
	WebSphere Home	
	WebSphere Host Name	
	WebSphere SOAP Port	

Property		Value
Tomcat Information:	WebSphere Application Server	
	Tomcat Web Application Deployment Directory	

Plumtree Administrative Portal Worksheet

Plumtree Administrative Portal Information	Value
Fully Qualified Domain Name and Ports:	
Portal Server Host	
Non-Secure Port	
Secure Port	
External Portal URL	
Plumtree API Service URL	
Plumtree Image Service URL	
Plumtree Search Host Name and Port:	
Plumtree Search Host Computer	
Port	
Default Plumtree Automation Service User Computer	
Portal database, Oracle connection information:	
Host name or IP address	
Port	
Portal Database SID	
Portal Database Schema user	
Portal Database Schema Password	
WebLogic Information:	
WebLogic Home	
WebLogic Host Name	
WebLogic Port	
WebLogic Domain Home	
WebLogic Domain	
WebLogic Server	
WebLogic Admin User	
Admin User Password	
WebSphere Information:	
WebSphere Home	
WebSphere Host Name	
WebSphere SOAP Port	
WebSphere Application Server	

Tomcat Information:	
Tomcat Web Application Deployment Directory	

Plumtree Automation Service Worksheet

Plumtree Automation Service Information	Value
Plumtree Automation Service Port	
Portal database, Oracle connection information:	
Host name or IP address	
Port	
Service name	
Schema user	
Schema user password	

Plumtree Document Repository Service Worksheet

Plumtree Document Repository Service Information	Value
Plumtree Document Repository Service Host and Port:	
Host name	
Port	

Plumtree Image Service Worksheet

Plumtree Image Service Information	Value
Plumtree Image Service URL	
WebLogic Information:	
WebLogic Home	
WebLogic Host Name	
WebLogic Port	
WebLogic Domain Home	
WebLogic Domain	
WebLogic Server	
WebLogic Admin User	
Admin User Password	
WebSphere Information:	
WebSphere Home	
WebSphere Host Name	
WebSphere SOAP Port	
WebSphere Application Server	
Tomcat Information:	
Tomcat Web Application Deployment Directory	

Portal Server Worksheet

Portal Server Information	Value
Fully Qualified Domain Name and Ports:	
Portal Server Host	
Non-Secure Port	
Secure Port	
Plumtree Administrative Portal URL	
Plumtree Image Service URL	
Plumtree Search Host Name and Port:	
Plumtree Search Host Computer	
Port	
Default Plumtree Automation Service User Computer	
Portal database, Oracle connection information:	
Host name or IP address	
Port	
Portal Database SID	
Portal Database Schema user	
Portal Database Schema Password	
WebLogic Information:	
WebLogic Home	
WebLogic Host Name	
WebLogic Port	
WebLogic Domain Home	
Portal Server Information	Value
WebLogic Domain	
WebLogic Server	
WebLogic Admin User	
Admin User Password	
WebSphere Information:	
WebSphere Home	
WebSphere Host Name	
WebSphere SOAP Port	
WebSphere Application Server	

Tomcat Information:	
Tomcat Web Application Deployment Directory	

Plumtree Search Worksheet

Plumtree Search Information	Value
Plumtree Search Host Name and Port:	
Host name	
Port	

Plumtree Content Upload Service Worksheet

Plumtree Content Upload Service Information	Value
Plumtree Content Upload Service - Application Port:	
Secure Port	
Non-Secure Port	
Port Number	
Plumtree API Service - Application Port:	
Secure Port	
Non-Secure Port	
Port Number	
Portal database, Oracle connection information:	
Host name or IP address	
Port	
Portal Database SID	
Portal Database Schema user	
Portal Database Schema Password	
Plumtree Document Repository Service Host and Port:	
Host name	
Port	

B XML Configuration Files Upgrade

The XML configuration file upgrade migrates configuration and localization XML files on any pre-6.0 portal installation from 5.x and later to a new 6.0 configuration file hierarchy.

The Portal configuration files are no longer under `[PT_HOME]/ptportal/5.0j/settings/config/`. Instead, they are moved under top-level `PT_HOME`. This is to facilitate sharing of common settings between products. For example, settings that are common are placed under `[PT_HOME]/settings/common`. Portal related settings are placed under `[PT_HOME]/settings/portal/`.

For more detailed information on .xml files, refer to the *Development Documentation* in G6 online help in the Plumtree Developer Center.

Merged Files

The files listed in the following table are merged between your previous portal's version and the new 6.0 version. In some cases, the new 6.0 file has a different file name from the previous file name. For example, a number of old setting XML files are converted into one XML file called **portalconfig.xml** in 6.0.

In merging the files, some of the settings' values are taken from the previous portal's version, while some are taken from the 6.0 version. For example, most of the values of the following files are taken from your previous portal's version:

- `j_config/n_config.xml`
- `PTconfig.xml`
- `serverconfig.xml`
- `AutomationServer.xml`
- `NavigationSettings.xml`
- `sso.xml`

The following files use the new 6.0 values:

- `timezones.xml`
- `JSComponentRegistry.xml`
- `AppWarmUpHelper.xml`
- `SearchLocales.xml`

The following files are merged between the 6.0 version and your previous portal's version:

- `SecureActivitySpaces.xml`
- `DisplayPlumtreeUtilities.xml`



Note: Note that serverconfig.xml and AutomationServer.xml only exist in 5.0j. Any previous version of the portal (5.0.x) uses the Windows Registry to store these settings.

5.x File and Location	6.x File and Location
j_config.xml and n_config.xml (ptportal/5.0j/settings/config)	portalconfig.xml(settings/portal)
PTconfig.xml (ptportal/5.0j/settings/config)	
device.xml (ptportal/5.0j/settings/config)	
timezones.xml (ptportal/5.0j/settings/config)	
sso.xml (ptportal/5.0j/settings/config)	
SecureActivitySpaces.xml (ptportal/5.0j/settings/config)	
JSComponentRegistry.xml (ptportal/5.0j/settings/config)	
NavigationSettings.xml (ptportal/5.0j/settings/config)	
SearchLocales.xml	
AppWarmUpHelper (ptportal/5.0j/settings/config)	
serverconfig.xml (ptportal/5.0j/settings/config)	serverconfig.xml (settings/common)
AutomationServer.xml (ptportal/5.0j/settings/config)	
DisplayPlumtreeUtilities.xml (ptportal/5.0j/settings/config/dynamicloads)	DisplayPlumtreeUtilities.xml (settings/portal/dynamicloads/Utilities)
PageActions.xml (ptportal/5.0j/settings/config/dynamicloads)	PageActions.xml (settings/portal/dynamicloads/PEIs)

Replaced Files

The following files are updated with the new 6.0 files because they have been updated since the previous release of the portal. No customization should have been done to these files, so the files from the previous installation can be safely discarded.

5.x File and Location	6.x File and Location
ActivitySpaces.xml (ptportal/5.0j/settings/config)	ActivitySpaces.xml (settings/portal)
VarPacks.xml (ptportal/5.0j/settings/config)	VarPacks.xml (settings/portal)
version.xml (ptportal/5.0j/settings/config)	version.xml (settings/portal)
ClassTypeDesc.xml (ptportal/5.0j/settings/config/dynamicloads)	ClassTypeDesc.xml (settings/portal/dynamicloads/ObjectDescriptions)
ProvInfo.xml (ptportal/5.0j/settings/config/dynamicloads)	ProvInfo.xml (settings/portal/dynamicloads/ObjectDescriptions)
DisplayPortalSettings.xml (ptportal/5.0j/settings/config/dynamicloads)	DisplayPortalSettings.xml (settings/portal/dynamicloads/Utilities)
DisplayServerSettings.xml (ptportal/5.0j/settings/config/dynamicloads)	DisplayServerSettings.xml (settings/portal/dynamicloads/Utilities)

New Files

These files are added in version 6.0 to their respective locations in the file hierarchy.

5.x File and Location	6.x File and Location
None	ConditionTypes.xml InterpreterFilters.xml OpenerPlugins.xml (settings/portal/dynamicloads/Plugins)
None	DisplayDiagnosticPages.xml (settings/portal/dynamicloads/Utilities)
None	OpenerActions.xml (settings/portal/dynamicloads/PEIs)
None	Tags.xml (settings/portal)
None	CustomTags.xml (settings/portal)

Reused Files

The following files contain customization settings that are specific to your portal installation. Therefore, the following files are copied from your portal's previous version.

5.x File and Location	6.x File and Location
CustomActivitySpaces.xml (ptportal/5.0j/settings/config)	CustomActivitySpaces.xml (settings/portal)
CustomVarPacks.xml (ptportal/5.0j/settings/config)	CustomVarPacks.xml (settings/portal)
All *Actions.xml files (ptportal/5.0j/settings/config/dynamicloads) except PageActions.xml and OpenerActions.xml	Same names (settings/portal/dynamicloads/PEIs)

C

Redirecting a URL

If you want to create a simpler URL for browser access to your portal, place an HTML re-direct page at the URL you prefer to publish. Create a file named **index.html** in the root folder of the application server virtual directory. An HTML re-direct page has content similar to the following example:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 3.2//EN">
<html>
<head>
<meta HTTP-EQUIV="Refresh" CONTENT="0; url=/portal/server.pt?">
</head>
</html>
```

Redirecting a URL -

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