



## **OVERVIEW OF UPGRADE TO PLUMTREE**

### **FOUNDATION G6**

December 2005

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# I. Overview

The different products that comprise the Plumtree portal system have different upgrades paths to the latest versions of those products. In addition, your infrastructure (for example, database version for your current version of the portal or other Plumtree products) may be different than required for Plumtree Foundation G6. This guide covers the basic steps that enable you to upgrade from one version of the Plumtree Corporate Portal and Plumtree Activity Services (formerly known as Server Products) to the latest version of Plumtree Foundation G6 and its Plumtree Activity Services.

You should refer to the installation and upgrade guides of the individual products and product versions for the actual steps required for installation and upgrade. The steps presented here are a high-level overview of the upgrade steps and any additional steps that may be required and may not necessarily be mentioned in the individual product guides. The following individual installation and upgrade guides for Plumtree Foundation G6 and Plumtree Activity Services are available on the Plumtree release media:

- *Installation and Upgrade Guide for Plumtree Foundation (Windows)*
- *Installation and Upgrade Guide for Plumtree Foundation (Unix and Linux)*
- *Upgrade Guide for Plumtree Foundation 4.5WS to 6.0*
- *Installation and Upgrade Guide for Plumtree Publisher*
- *Installation and Upgrade Guide for Plumtree Collaboration*
- *Installation and Upgrade Guide for Plumtree Studio*

## Upgrade Paths

Listed below are the supported product versions for the Plumtree Portal and its Server products:

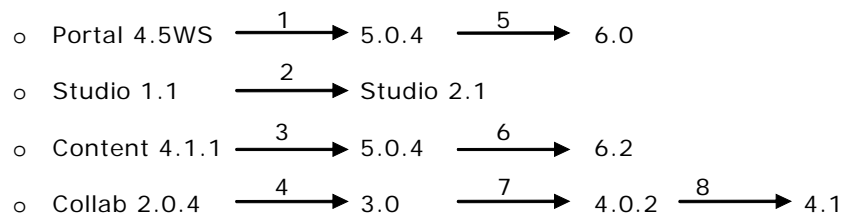
- **Plumtree Corporate Portal 4.5WS SP3**
  - Plumtree Collaboration Server 2.0.4
  - Plumtree Content Server 4.1.1
  - Plumtree Studio Server 1.1
- **Plumtree Corporate Portal 5.0**
  - Plumtree Collaboration Server 3.0 and 4.0
  - Plumtree Content Server 5.0
  - Plumtree Studio Server 2.1
- **Plumtree Foundation G6**
  - Plumtree Collaboration 4.1
  - Plumtree Publisher 6.2
  - Plumtree Studio 2.1

The following upgrade paths are currently supported for each Plumtree product and version.

- **Plumtree Corporate Portal 4.5WS SP3** *direct to Plumtree Foundation G6*
- **Plumtree Corporate Portal 5.0.2** and higher *direct to Plumtree Foundation G6*

- **Plumtree Studio Server 1.1** *direct* to **Plumtree Studio 2.1**
- **Plumtree Content Server 4.1.1** to **Plumtree Content Server 5.0.4** *direct* to **Plumtree Publisher 6.2**
- **Plumtree Collaboration Server 2.0.4** to **Plumtree Collaboration Server 3.0** to **Plumtree Collaboration Server 4.0.2** *direct* to **Plumtree Collaboration 4.1**

Depending on the state of your current portal system, the upgrade may require upgrade to interim versions of Plumtree products. The process can be visualized as follows:



## Infrastructure Requirements

Plumtree Foundation G6 has the following infrastructure requirements:

- **Operating Systems:**
  - Windows 2003 SP1
  - Linux Red Hat ES 3 Update 3
  - SUSE Linux 9
  - AIX 5.3
  - Solaris 8 or 9
- **Databases:** MS SQL Server 2000 SP3a, Oracle 9i (9.2.0.4), Oracle 10g (10.1.0.3)
- **Application Servers:** .NET 1.1 SP1 (on Windows), Tomcat 5.0.28 (on Windows and Red Hat), BEA WebLogic 8.1 SP4 (on Windows and Red Hat)
  - **Windows:** .NET 1.1 SP1, WebLogic 8.1 SP4 and the Sun SDK 1.4.2\_05, WebSphere 6.0.1 and the IBM SDK 1.4.2, Tomcat 5.0.28 and the Sun SDK 1.4.2\_06
  - **Red Hat:** WebLogic 8.1 SP4 and the JRockit SDK 1.4.2\_05-8140, Tomcat 5.0.28 and the Sun SDK 1.4.2\_06
  - **SUSE:** WebLogic 8.1 SP4 and the JRockit SDK 1.4.2\_05-8140, WebSphere 6.0.1 and the IBM SDK 1.4.2, Tomcat 5.0.28 and the Sun SDK 1.4.2\_06
  - **Solaris:** WebLogic 8.1 SP4 and the Sun SDK 1.4.2\_05, Tomcat 5.0.28 and the Sun SDK 1.4.2\_06
  - **AIX:** WebSphere 6.0.1 and the IBM SDK 1.4.2
- **Browsers:** Microsoft Internet Explorer 5.5 and 6.0, Netscape 7.2, Safari 1.2, and Firefox 1.0.
- **Plumtree Server Products:** Collaboration 4.1, Publisher 6.2 (formerly Content Server), Studio 2.1
- **Remote Web Services:** All applications integrated with Plumtree Foundation G6 must be “remote” i.e., no native LDAP Authentication Sources or native file crawlers.

These infrastructure requirements are different from those initially listed for the Plumtree Corporate Portal 4.5WS SP3 and 5.0. In an effort to simplify upgrade to Plumtree Foundation

G6, some additional infrastructure support has been added to previous versions of Plumtree Products. The most significant of which is the support for Oracle 9.2.0.4 for Plumtree Foundation G6 versions of the portal and Activity Services. This was done to allow the database server to be upgraded before the upgrade of the rest of the portal system since typically the database server is shared by the portal with other applications.

Other infrastructure components such as operating system and application server may not have overlap of versions between what is supported by the different versions of the components of a portal system. This is generally acceptable because the portal and its components often have dedicated servers so updating the infrastructure along with the portal system is not an issue.

However, there several upgrade paths that require upgrade to interim states with different infrastructure requirements. For example, Plumtree 4.5WS SP 3 with Collaboration Server 2.0.4 to Plumtree Foundation G6 with Collaboration 4.2 has interim states. For these situations, it is recommended that you upgrade the infrastructure to the lowest version that is supported by Plumtree Foundation G6 and its Activity Services and install any previous version of those products on that infrastructure unless there are specific instructions to do otherwise in this overview guide. Although it is not recommended for production systems, running the portal system when it is in one of the interim steps during the upgrade for a short amount of time is acceptable to eliminate the requirement of upgrading the infrastructure components multiple times.

If you are starting from a very old portal system and wish to have the Plumtree Foundation G6 system running on the latest supported versions of the infrastructure components, you may need to upgrade infrastructure components multiple times. The first time would be to go to the mutually supported version of the infrastructure component and the second time is to the latest version of the infrastructure component. An example of this would be going from the Plumtree Corporate Portal 4.5WS SP3 running on Oracle 8 to Plumtree Foundation G6 on Oracle 10g. Since the Plumtree 4.5WS SP3 and Plumtree Foundation G6 both support Oracle 9.2.0.4, you would first upgrade Oracle to 9.2.0.4, upgrade the portal to Foundation G6, the upgrade Oracle again to 10g.

## Key Components/Steps

If you need to run through interim steps to upgrade to Plumtree Foundation G6, you do not necessarily need to upgrade every portal server in your system to the interim states. The key components that must be upgraded are the database(s) and the data repositories (for example, the Document Repository). Those upgrades can be performed with one installation. For example, if your portal system is running 4.5WS SP3 using three portal servers and you must go to version 5.0 as an interim step, you do not need to upgrade all three portal servers to version 5.0 before going to Plumtree Foundation G6. You only need to install version 5.0 on one of the portal servers, upgrade the database to version 5.0 specifications, then continue to upgrade to Plumtree Foundation G6. The other two portal servers can have Plumtree Foundation G6 code installed directly on top of the version 4.5WS SP3 code.

You only need to upgrade one instance of the following portal system components for interim steps in the upgrade.

- Database(s) – For example, Portal, Collaboration, Content, and Studio
- Administrative Portal Server
- Image Server – Required for Plumtree Activity Services product start up procedures.
- Document Repository
- Plumtree Activity Services – For example, Collaboration, Content, and Studio

- Remote versions of native data sources – Install the latest versions that also work with Plumtree Foundation G6 so that you do not need to install them again.

You may install one instance of all the portal system components: for example, the automation server if you wish to perform thorough testing during the interim steps but it is not necessary.

You should wait to implement any organization or management changes until you have upgraded to Plumtree Foundation G6. Reorganizing the portal may be resource intensive so it is best to do it only once.

Another upgrade step that may be skipped until the end is implementing customizations. Plumtree 4.5WS SP3 has different UI infrastructure that the Plumtree Corporate Portal 5.0 and Plumtree Foundation G6. Since Plumtree Corporate Portal 5.0 is only an interim step, you should not implement any customizations during that step since you will have to implement them again on Plumtree Foundation G6.

## Relative Time Publications

Plumtree Corporate Portal 4.5WS supported publications that returned documents based on relative time conditions. Plumtree Foundation G6 also supports the corollary to these publications (called snapshot queries) that support relative time conditions. However, Plumtree Corporate Portal 5.0.x did not support relative time conditions.

If you upgrade directly from the Plumtree Corporate Portal 4.5WS to Plumtree Foundation G6, the relative time condition will be preserved as publications are transformed into snapshot queries. If you must use the Plumtree Corporate Portal 5.0 as an interim step, the relative time conditions are not be preserved. Please contact Plumtree Consulting Services for more information on how to resolve this situation.



## 2. Upgrade Methodology

This upgrade methodology section is broken in to sub-sections according to the initial state of your portal system. Each methodology lists the all the possible steps required to upgrade a portal system from the “lowest” possible state of the system with all of the Plumtree Activity Services to Plumtree Foundation G6 with all of the Activity Services. Therefore, there may be steps that are not required for your particular upgrade. You may skip the unnecessary steps and only perform the steps that are required. The basic upgrade steps are as follows:

1. Upgrade your database program from your current version to a version that is supported by Plumtree Foundation G6.
2. Upgrade to the remote versions of any native authentication source.
3. Install the remote versions of any native data source.
4. Install and upgrade the Portal.
5. Install and upgrade Plumtree Activity Services.
6. Repeat steps 4 and 5 as necessary.

You may pause the upgrade after steps 1 or 2 and run your production portal in that state until you are ready to upgrade to Plumtree Foundation G6. Steps 3 to the end should all be done at once.

### Plumtree Corporate Portal 4.5WS SP3 with No Activity Services

The initial steps prepare your system to be upgraded to Plumtree Foundation G6. They may be done well in advance and you may run your production portal in the resulting state until you are ready for your upgrade to Plumtree Foundation G6.

1. Upgrade your database version from your current system to what is required by Plumtree Foundation G6 while still supporting the Plumtree Corporate Portal 4.5WS SP3.
  - You may test your portal system at this point.
2. Install the latest remote versions of any native authentication source.
3. Upgrade your native authentication sources to remote authentication sources using your current version of the portal.
  - You may test your synchronized groups and users at this point.

You may leave your portal in this state until you are prepared to upgrade to Plumtree Foundation G6.

**Note:** The following steps are the actual upgrade to Plumtree Foundation G6.

4. Upgrade your portal server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Foundation G6.
5. Install the latest remote version of any native data sources onto the appropriate remote servers. You do not need to register these in the portal.
6. Install and upgrade to Plumtree Foundation G6
  - You should thoroughly test your system at this point.
7. Implement any needed customizations.

## Plumtree Corporate Portal 4.5WS SP3 with All Activity Services and No Relative Time Publications

The initial steps prepare your system to be upgraded to Plumtree Foundation G6. They may be done well in advance and you may run your production portal in the resulting state until you are ready for your upgrade to Plumtree Foundation G6.

1. Upgrade your database version from your current system to what is required by Plumtree Foundation G6 while still supporting the Plumtree Corporate Portal 4.5WS SP3 and 5.0.4.
  - You may test your portal system at this point.
2. Install the latest remote versions of any native authentication source.
3. Upgrade your native authentication sources to remote authentication sources using your current version of the portal.
  - You may test your synchronized groups and users at this point.

You may leave your portal in this state until you are prepared to upgrade to Plumtree Foundation G6.

**Note:** The next steps are interim steps necessary to get you to Plumtree Foundation G6. Since they are only interim steps, it is recommended that you perform them in a single cycle along with your upgrade to Plumtree Foundation G6.

4. Upgrade your portal server infrastructure: for example, hardware or operating system to the meet the requirements of the Plumtree Corporate Portal 5.0.4.
5. Install the latest remote version (the Plumtree Foundation G6 version) of any native data sources on to the appropriate remote servers.
  - a. Although you are only upgrading to the Plumtree Corporate Portal 5.0.4, Plumtree Foundation G6 versions of these products should still work with the Plumtree Corporate Portal 5.0.4 and will eliminate the need to upgrade these products again when you upgrade to Plumtree Foundation G6.
  - b. You do not need to register these products in the portal. You only need to install the code onto the servers.
6. Install and upgrade to Plumtree Corporate Portal 5.0.4.
  - You may test your base 5.0.4 system at this point.
7. Upgrade your Content Server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Publisher 6.2 (formerly Content Server).
8. Install and upgrade to Plumtree Content Server 5.0.
  - You may test your Content Server system at this point.
9. Upgrade your Collaboration Server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Collaboration 4.1.
10. Install and upgrade to Plumtree Collaboration Server 3.0
  - You may test your Content Server system at this point.

Your portal should now be in a state to support direct upgrades from the portal and each of your Activity Services to Plumtree Foundation G6 and its versions of Activity Services. You do not need to install an interim version of Plumtree Studio because Studio supports direct upgrade from the Plumtree Corporate Portal 4.5WS SP3 version (Studio 1.1) to Plumtree Foundation G6 version (Studio 2.1).

11. Upgrade your portal server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Foundation G6.
12. Install and upgrade to Plumtree Foundation G6.
  - You may test your Plumtree Foundation G6 system at this point.
13. Install and upgrade to Plumtree Studio Server 2.1.
  - You may test your Studio system at this point
14. Install and upgrade to Plumtree Publisher 6.2 (formerly Content Server).
  - You may test your Publisher system at this point
15. Install and upgrade to Plumtree Collaboration 4.1
  - You may test your Collaboration system at this point.
16. Implement any needed customizations.

## Plumtree Corporate Portal 4.5WS SP3 with Plumtree Studio Server and Relative Time Publications

The initial steps prepare your system to be upgraded to Plumtree Foundation G6. They may be done well in advance and you may run your production portal in the resulting state until you are ready for your upgrade to Plumtree Foundation G6.

1. Upgrade your database version from your current system to what is required by Plumtree Foundation G6 while still supporting the Plumtree Corporate Portal 4.5WS SP3.
  - You may test your portal system at this point.
2. Install the latest remote versions of any native authentication source.
3. Upgrade your native authentication sources to remote authentication sources using your current version of the portal.
  - You may test your synchronized groups and users at this point.

You may leave your portal in this state until you are prepared to upgrade to Plumtree Foundation G6.

**Note:** Your portal should now be in a state to support direct upgrade to Plumtree Foundation G6 and its versions of Plumtree Activity Services.

4. Upgrade your portal server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Foundation G6.
5. Install and upgrade to Plumtree Foundation G6.
  - You may test your Plumtree Foundation G6 system at this point.
6. Install and upgrade to Plumtree Studio Server 2.1.
  - You may test your Studio system at this point
7. Implement any needed customizations.

## Plumtree Corporate Portal 4.5WS SP3 with Collaboration or Content Server and Relative Time Publications

If you are currently on Plumtree Corporate Portal 4.5WS SP3 with Plumtree Collaboration or Content Server and Relative Time Publications, you should call Plumtree Consulting Services for assistance.

## Plumtree Corporate Portal 5.0 with All Activity Services

The initial steps prepare your system to be upgraded to Plumtree Foundation G6. They may be done well in advance and you may run your production portal in the resulting state until you are ready for your upgrade to Plumtree Foundation G6.

1. Upgrade your database version from your current system to what is required by Plumtree Foundation G6 while still supporting the Plumtree Corporate Portal 5.0.x.
  - You may test your portal system at this point.
2. Install the latest remote versions of any native authentication source.
3. Upgrade your native authentication sources to remote authentication sources using your current version of the portal.
  - You may test your synchronized groups and users at this point.

You may leave your portal in this state until you are prepared to upgrade to Plumtree Foundation G6.

**Note:** The next 3 steps are necessary to prepare your system for direct upgrades to Plumtree Foundation G6 and its version of Plumtree Activity Services. Since they are only interim steps, it is recommended that you perform them in a single cycle along with your upgrade to Plumtree Foundation G6.

4. Run the DB upgrade scripts included with Plumtree Foundation G6 installation package to upgrade your database to at least the Plumtree Corporate Portal 5.0.2 version before continuing.
  - You do not need to install the Plumtree Corporate Portal 5.0.2 software. Also, you do not need to do extensive testing of your portal system at this point.

Since the Plumtree Corporate Portal supported Plumtree Collaboration Server 3.0.x and 4.0.x, you must get to at least Plumtree Collaboration Server 4.0.2 as an interim step before upgrading to Plumtree Foundation G6.

5. Upgrade your Collaboration Server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Collaboration 4.1.
6. Install and upgrade to Plumtree Collaboration Server 4.0.2.
  - You may test your Collaboration Server system at this point.

Your portal should now be in a state to support direct upgrades from the portal and each of your Server products to Plumtree Foundation G6 and its versions of Plumtree Activity Services.

7. Upgrade your portal server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Foundation G6.
8. Install and upgrade to Plumtree Foundation G6.

- You may test your Plumtree Foundation G6 system at this point.
- 9. Upgrade your Studio Server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Studio 2.1.
- 10. Install and upgrade to Plumtree Studio Server 2.1.
  - You may test your Studio system at this point.
- 11. Upgrade your Content Server infrastructure: for example, hardware or operating system to the meet the requirements of Plumtree Publisher 6.2 (formerly Content Server).
- 12. Install and upgrade to Plumtree Publisher 6.2.
  - You may test your Publisher system at this point.
- 13. Install and upgrade to Plumtree Collaboration 4.1
  - You may test your Collaboration system at this point.
- 14. Implement any needed customizations.