



INSTALLATION AND UPGRADE GUIDE FOR PLUMTREE ANALYTICS

Plumtree Analytics 1.2

December 2005 Update

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Welcome

This guide describes how to install and configure Plumtree Analytics.

This guide is written for portal administrators who are responsible for 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.
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</i> <code>computer</code>	Enter the base URL for the Portlet Server. For example, <code>http://my_computer/</code> .
<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 Guide

This guide uses the following margin icons:



Note: The Note icon is used to denote tips, best practices, or additional information.



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.

Table 1-2: Plumtree Documentation and Resources (Sheet 1 of 2)


Resource	Description
Release Notes	<p>These files are written for portal administrators. They include information about new features and known issues in the release.</p> <p>They are available in electronic form (HTML) in the Plumtree Product Center.</p>
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.</p> <p>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 Plumtree Analytics users. It describes the user interface for Analytics and gives detailed instructions for completing tasks in the console and portal.</p> <p>To access online help, click  Help in the upper-right corner of the portal banner or console page.</p>

Table 1-2: Plumtree Documentation and Resources (Sheet 2 of 2)

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, 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, and access recent product documentation.</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>										
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 Plumtree Analytics

Plumtree Analytics allows portal managers and business owners to track and analyze portal usage. Plumtree Analytics provides the following basic functionality:

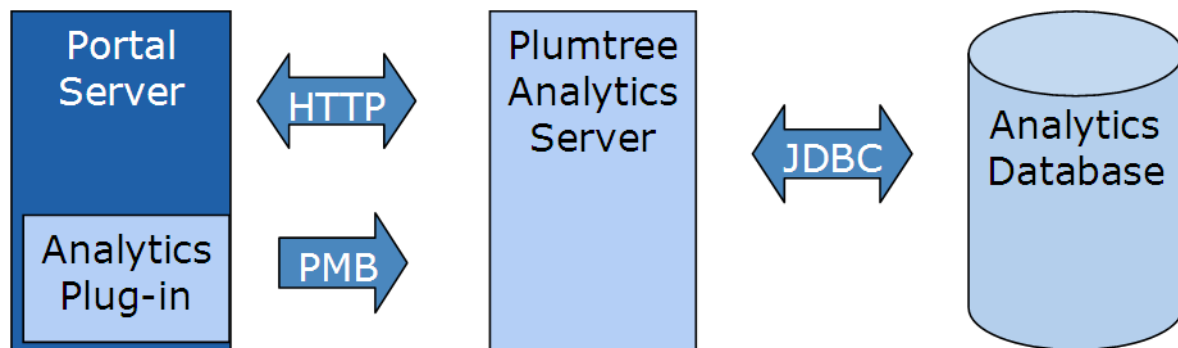
- **Usage Tracking Metrics:** Metrics are gathered for common portal functions, including community, portlet and document hits.
- **Behavior Tracking:** Gathered metrics can be analyzed to determine usage patterns, such as portal visit duration and usage over time.
- **User Profile Correlation:** Metric information can be correlated with user profile information. Usage tracking reports can be viewed and filtered by user profile data such as country, company or title.



Note: Profile values that are over 255 characters in length will be truncated to 255 characters in the Analytics database. The profile values will not be altered in the portal database.

Components of Plumtree Analytics

Plumtree Analytics is comprised of the following components:



Component	Description
Portal Server Analytics Plug-in	Usage tracking metrics are gathered by the Portal Server Analytics Plug-in and sent to Plumtree Analytics via the Plumtree Message Bus (PMB).
Plumtree Analytics	Analytics is a stand-alone server that receives data from the Portal Server Analytics Plug-in, gathers data from the portal database through the EDK, and provides analysis of data to the end user through the Analytics Console or other portlets.
Analytics DB	The Analytics database component provides storage for gathered metrics.

For a list of ports used by Analytics, see [“Ports Required by Plumtree Analytics” on page 3-2](#).

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Completing Pre-Installation Steps

Complete the following basic steps to prepare your network and host computers for deployment:

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 at the top-level directory of the product package.
2. Print the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#) Determine and record the values you have assigned for this deployment.
3. Provision host computers for your deployment and install prerequisite software. For details, see [“Hardware and Software Requirements” on page 3-1.](#)
4. Ensure you have administrative access to the resources you need to complete installation and configuration tasks. For details, see [“Administrative User Requirements” on page 3-2.](#)



Note: Make sure that the system PATH environment variable includes a reference to your current directory. This can be achieved by adding a “.” character to the beginning.

UNIX and Linux example: **export PATH=.:\$PATH**

Windows example: **set PATH=.;%PATH%**

Hardware and Software Requirements

The following table summarizes the hardware, operating system, and software requirements for Plumtree Analytics



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



Note: For an up-to-date list of supported versions, refer to the Interoperability page in the Support Center..

Component	Requirement
Analytics Host Computer	Hardware <ul style="list-style-type: none">• 1.6 GHz or higher, with 2MB L2 cache• 1 GB memory• 2 GB disk space Operating System <ul style="list-style-type: none">• Windows 2003 Server SP1• Red Hat Enterprise Linux 3 Update 3 (ES & AS), on x86• SUSE Linux 9, on x86• AIX 5.3, on POWER3, POWER4, POWER5• Solaris 8 and 9, on SPARC

Component	Requirement
Database Server Host Computer	<p>Hardware</p> <ul style="list-style-type: none"> • Dual 2.0 GHz or higher, with 2 MB L2 cache • 2 GB memory or higher • Mirrored SCSI drives (either 15K or 10K RPM) • Disk space to accommodate growth of the Analytics datamart. Growth is directly correlated to the number of events occurring. Events include such things as page views, portlet views, user logins, and discussion posts. Estimate 100 MB of growth per 1 million events. For example, if your portal receives roughly 1 million events per day, you should anticipate growth of 36.5 GB per year. <p>Software</p> <ul style="list-style-type: none"> • Microsoft SQL Server 2000 SP3a (Windows only) • Oracle 9i in default or Oracle RAC configuration • Oracle 10g in default or Oracle RAC configuration
Portal Compatibility	Plumtree Foundation 6.0

Administrative User Requirements

The installation and configuration of Plumtree Analytics components require the following administrative user permissions.

User	Permissions
Local Host Administrator Account	To install Plumtree Analytics components, you must log in to the host computers as the local Administrator.
Portal Database and Portal Administrative User Accounts	To configure the required portal database and portal administrative objects, you must provide the user name and password for the appropriate administrative user accounts.

Ports Required by Plumtree Analytics

The following table summarizes the ports that need to be open and usable by Plumtree Analytics:

Table 3-1: Ports required by Analytics

Communication	Description
Portal to Analytics port 31313	Used for data collection.
Portal to Analytics port 11944	Used to display reports.

Table 3-1: Ports required by Analytics

Communication	Description
Analytics to Image Service port 80	Used to embed objects stored on the image service into Analytics reports.
Analytics to Portal DB and Collaboration DB. Port used depends on database implementation, for example 1433 (SQLServer) or 1521 (Oracle)	Used to synchronize data from portal or Collaboration.
Analytics to API Services machine port 11905	Used to synchronize data from the portal.



Note: These port numbers can be changed during installation and configuration of Analytics, except port 31313. This port cannot be edited.

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Installing and Configuring Plumtree Analytics Components

This chapter describes the steps you take to install Plumtree Analytics components:

1. Ensure you have completed pre-installation steps. For details, see [Chapter 3, “Completing Pre-Installation Steps.”](#)
2. Install the Plumtree Analytics Remote Server component of the installation package on the remote server host computer. For details, see [“Installing the Plumtree Analytics Remote Server Component” on page 4-1.](#)
3. Set up the Plumtree Analytics database. For details, see [“Configuring the Plumtree Analytics Database” on page 4-2.](#)
4. Configure Plumtree Analytics. For details, see [“Configuring Plumtree Analytics” on page 4-4](#)
5. Install the portal server component of the installation package on all portal servers in your portal. For details, see [“Installing the Plumtree Analytics Portal Component” on page 4-6](#)
6. Install the Image Service component of the installation package on your portal Image Service host. For details, see [“Installing the Plumtree Analytics Image Service Component” on page 4-7.](#)
7. Register the Plumtree Analytics application, remote server, web services, and portlets with the portal. For details, see [“Registering Plumtree Analytics with the Plumtree Foundation” on page 4-9.](#)

Installing the Plumtree Analytics Remote Server Component

This section describes how to install the Plumtree Analytics remote server component. The instructions are the same for installing on a Windows, UNIX, or Linux host, with slight exceptions as noted. To install the Plumtree Analytics remote server component:

1. Log in to the Remote Server host computer as the local administrator (on Windows) or a user with directory write privileges (on UNIX or Linux).
2. Copy the installer to the disk location from which you plan to launch it. The installer file is **Plumtree-Analytics.exe** (Windows) or **PlumtreeAnalytics** (on UNIX or Linux).
3. Close all unnecessary applications.
4. Execute the installer file.
5. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Choose Analytics .
Installation Folder	Accept the default: <ul style="list-style-type: none">• C:\Program Files\plumtree (Windows)• /opt/plumtree (UNIX and Linux)

Wizard Page	Description
Application Port	Select http or https protocol and accept the default port: 11944 .

6. On the final Wizard page, click **Install** to begin the installation.



Note: After the installer has copied all files to the installation directory, click **Done**. The Plumtree Analytics Configurator will launch; however, do not complete the configuration at this time. First, configure the Plumtree Analytics Database, described in [“Configuring the Plumtree Analytics Database” on page 4-2](#).



Note: The installer writes a log file in the directory where it is installed (for example: **C:\Program Files\plumtree**). If you encounter problems during installation, examine the error messages in the log file.



Important: Plumtree recommends that you sync the Analytics and Portal clocks before proceeding with configuration. If the clocks are not aligned, some events and sync jobs behave incorrectly.

Configuring the Plumtree Analytics Database

After you have run the installer, configure the Analytics components. This section describes how to set up the Analytics database. It contains the following sections:

[“Creating and Setting Up a Microsoft SQL Server Database”](#)

[“Creating and Setting Up an Oracle Database” on page 4-3](#)

Creating and Setting Up a Microsoft SQL Server Database

To set up the Plumtree Analytics database on Microsoft SQL Server:

1. Copy the scripts from **<PT_HOME>\ptanalytics\1.2\sql\mssql** to the database host computer.
2. Create the Plumtree Analytics database user:
 - a. To open the Enterprise Manager: click **Start | Programs | Microsoft SQL Server | Enterprise Manager**.
 - b. In the navigation pane, expand the objects to display subfolders of the **Security** folder.
 - c. Right-click the **Logins** icon; then click **New Login**.
 - d. In the **SQL Server Login Properties** dialog box, enter the user name you provisioned when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)
 - e. In the Authentication area, choose **SQL Server Authentication** and enter the corresponding password.
 - f. Confirm the password to complete the process.

3. Create the Plumtree Analytics database with the following properties:
 - Configure the database server so that it is case-insensitive.
 - Create a database with the name you provisioned when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)
 - Configure the size of the database. The growth of the database is directly correlated to the number of events present in the system. Events include such things as page views, portlet views, user logins, and discussion posts. Estimate 100 MB of growth per 1 million events. For example, if your portal receives roughly 1 million events per day, you should anticipate growth of 36.5 GB per year.
4. Assign database rights for the Plumtree Analytics database user:
 - a. To open the Enterprise Manager: click **Start | Programs | Microsoft SQL Server | Enterprise Manager**.
 - b. In the navigation pane, expand the objects to select the **Security** folder.
 - c. In the objects pane, right-click the Plumtree Analytics user and select **Properties**.
 - d. On the **General** tab, in the Defaults section, select the Plumtree Analytics database.
 - e. Click the **Database Access** tab.
 - f. In the **Specify which databases can be accessed by this login** box, check the Plumtree database.
 - g. In the **Database roles for database_name** box, check **public** and **db_owner**
 - h. Click **OK**.
 - i. In the navigation pane, expand the objects to display the Plumtree Analytics database; right-click the Plumtree Analytics database and select **Properties**.
 - j. Click the **Permissions** tab and grant all permissions to the Plumtree Analytics database user.
5. Start the SQL Server Query Analyzer and use SQL Server Authentication to connect to the Plumtree Analytics database as the Plumtree Analytics database user.
6. Run the setup scripts for the database, located in the **<PT_HOME>\ptanalytics\1.2\sql\mssql** folder, in the following order:
 - a. **db_creation.sql**
 - b. **install_seeddata.sql**

To run a script:

 - a. To display the Open Query File dialog box, choose **File | Open**.
 - b. Browse and select the database script file.
 - c. Click **Query | Execute**.
7. Close SQL Server Query Analyzer.

Next, configure the Plumtree Analytics application, as described in [“Configuring Plumtree Analytics” on page 4-4](#).

Creating and Setting Up an Oracle Database

To create and set up the Plumtree Analytics Oracle database:

1. Copy the scripts from **<PT_HOME>\ptanalytics\1.2\sql\oracle** to the host computer for the Analytics Server database.
2. Log on to the host computer for the Analytics database as owner of the Oracle system files.
3. Create the Plumtree Analytics database user you provisioned when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)
4. Create a database with the name you provisioned when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)
When you set up the database, configure AL32UTF8 as the database character set and ALI6UTF16 as the national character set.
5. The Oracle Database scripts install into the default tablespace configured for the database. Plumtree recommends that you have an Oracle Database Administrator modify these scripts to utilize the appropriate tablespaces that are define in the database.
6. From the folder that contains your Oracle scripts, start **sqlplus** and run the setup scripts in the following order:
 - a. **db_creation.sql**
 - b. **install_seeddata.sql**
7. Exit **sqlplus**.

Next, configure the Plumtree Analytics application, as described in [“Configuring Plumtree Analytics” on page 4-4.](#)

Configuring Plumtree Analytics

This section describes how to configure Plumtree Analytics . To configure Plumtree Analytics:


1. Return to the browser window that launched when you completed the installer. If you have closed the browser window, you can launch the Plumtree Analytics Configurator on Windows by choosing **Start | Programs | Plumtree | Analytics Configurator**. On UNIX or Linux, open the following location in a web browser:


http://<analyticshostname>:11944/configurator/ui/start.jsf.



Important: On Windows 2003, IE Security settings might prevent the configurator from completing. If this is the case, configure IE to completely trust the Analytics host computer.

2. Click the **Continue** button to begin the sequence of configuration pages. Complete the following configuration pages using the values you decided on when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)

Configuration Page	Settings
Analytics Database Connection Information	<p>Analytics Database Server Type</p> <p>Analytics Database Server Name</p> <p>Analytics Database Server Port</p> <p>Analytics Database Name/SID</p> <p>Analytics Database User Name</p> <p>Analytics Database Password</p>
Analytics Data Configuration	<p>Start Year- This is the first year in which you plan to gather metrics.</p> <p>Stop Year- This is the last year in which you plan to gather metrics. It is recommended that you set the stop year no more than several years out so that you do not take up unnecessary space in your database.</p> <p>Visit Time-out (seconds)- This field is used to calculate a user's portal visit duration. When a user does not interact with the portal within the 'Visit Timeout', Analytics will initiate a new portal visit the next time the user interacts with the portal.</p> <p>Active User Time-out (days) - This field is used to calculate user inactivity. When a user does not use the portal within the specified 'Active User Timeout', that user is considered inactive. Upon installation, the user's status will NOT change until the time you specify has passed.</p> <p>Enable Portlet View - This field is used to enable or disable Analytics from collecting portlet view events. This feature also enables and disables the Portlet ResponseTime data from being collected.</p> <p>Select Export Size (reports)- This field is used to specify the number of records to export from report.</p>
API Service Information	<p>API Service URL- For example, http://<api_service_machine_name>:1905/ptapi/services/Query-InterfaceAPI</p> <p>Portal Username</p> <p>Portal Password</p> <div>  <p>Important: This user must be for a portal account that has Select rights to all communities, portlets, users, documents, and Collaboration Server projects. It is recommended to enter a user that belongs to the Administrators group.</p> </div>

Configuration Page	Settings
Portal Database Connection Information	Portal Database Server Type Portal Database Server Name Portal Database Server Port Portal Database Name/SID Portal Database User Name  Important: This user name must be the same as the one you used to create the Portal database. Portal Database Password
Collaboration Database Connection Information	Collaboration Database Server Type Collaboration Database Server Name Collaboration Database Server Port Collaboration Database Name/SID Collaboration Database User Name Collaboration Database Password Linked Portal DB Username

3. On the final page, click **Finish**.



Note: The Plumtree Analytics Configurator verifies connectivity according to the configuration information you have entered and logs success or errors to the browser window. If you encounter errors, follow the instructions in the error message or see [Chapter 6, “Troubleshooting.”](#)

Installing the Plumtree Analytics Portal Component

This section describes how to install the Plumtree Analytics Portal Component. The instructions are the same for installing on a Windows, UNIX, or Linux host, with slight exceptions as noted. To install the Plumtree Analytics Portal Component:

1. Log in to the portal host computer as the local administrator or the Plumtree user created during installation of the portal.
2. Copy the installer to the disk location from which you plan to launch it. The installer file is **Plumtree-Analytics.exe** (Windows) or **PlumtreeAnalytics** (on UNIX and Linux).
3. Close all unnecessary applications and windows.
4. Double-click the installer file.

5. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Choose Portal Files .
Installation Folder	Browse and select the location of the Portal Server installation, for example: C:\Program Files\plumtree\ptportal\6.0 .
Analytics Fully Qualified Domain Name	Specify the fully qualified domain name for the host computer for the Analytics remote server component you installed in “Installing the Plumtree Analytics Remote Server Component” on page 4-1.

6. On the final Wizard page, click **Install** to begin the installation.
7. When installation is complete, redeploy your portal.war or portal.ear file to your portal application server.



Note: The installer writes a log file in the directory where it is installed (for example: **C:\Program Files\plumtree**). If you encounter problems during installation, examine the error messages in the log file.

Installing the Plumtree Analytics Image Service Component

This section describes how to install the Plumtree Analytics Image Service component. The instructions are the same for installing on a Windows, UNIX, or Linux host, with minor differences as noted. To install the Plumtree Analytics Image Service component:

1. Log in to the Image Service host computer as the local administrator or the Plumtree user created during installation of the portal.
2. Copy the installer to the disk location from which you plan to launch it. The installer file is **Plumtree-Analytics.exe** (Windows) or **PlumtreeAnalytics** (on UNIX and Linux).
3. Close all unnecessary applications and windows.
4. Double-click the installer file.
5. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the configuration worksheet provided in [Appendix A, “Analytics Server Configuration Worksheet.”](#)

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Choose Image Service Files .

Wizard Page	Description
Installation Folder	Browse and select the location of the Image Service installation, for example: C:\Program Files\plumtree\ptimages .

6. On the final Wizard page, click **Install** to begin the installation.



Note: The installer writes a log file in the directory where it is installed (for example: **C:\Program Files\plumtree**). If you encounter problems during installation, examine the error messages in the log

Starting Plumtree Analytics and Portal Services

This section provides information on starting Plumtree Analytics and portal services. It includes the following sections:

- [“Starting Plumtree Analytics and Portal Services on Windows”](#) on [page 4-8](#)
- [“Starting Plumtree Analytics and Portal Services on UNIX and Linux”](#) on [page 4-8](#)

Starting Plumtree Analytics and Portal Services on Windows

After you have installed all Plumtree Analytics components:

- On the host computer for the Plumtree Analytics, run the **Analytics Server Sync** job. From the Windows Control Panel, click **Scheduled Tasks**; right-click **Analytics Server Sync** and choose **Run**. Some Analytics Console reports cannot be displayed until this job has been completed.
- Ensure the Plumtree Analytics service has been started. From the Windows Control Panel, click **Administrative Tools | Services**; if the Plumtree Analytics service has not started, right-click it and choose **Start**.
- Ensure the Plumtree Analytics Collector service has been started. From the Windows Control Panel, click **Administrative Tools | Services**; if the Plumtree Analytics Collector service has not started, right-click it and choose **Start**.

Starting Plumtree Analytics and Portal Services on UNIX and Linux

After you have installed all Plumtree Analytics components:

- On the host computer for Plumtree Analytics, run the **Analytics Server Sync** job. On the host computer for the Plumtree Analytics, run:
<PT_HOME>/ptanalytics/1.2/bin/sync.sh
- Ensure the Plumtree Analytics service has been started:
<PT_HOME>/ptanalytics/1.2/bin/analyticsd.sh start
- Ensure the Plumtree Analytics Collector service has been started:
<PT_HOME>/ptanalytics/1.2/bin/collectord.sh start

Registering Plumtree Analytics with the Plumtree Foundation

This section describes how to register the Plumtree Analytics Console, remote server, web service, and portlet objects with the portal. To register the Plumtree Analytics objects with Plumtree Foundation:

1. Log into the Administrator Portal.
2. Click **Administration**.
3. From the **Select Utility** drop-down choose **Migration - Import**.
4. Browse to select the location of the migration package. If you accepted installation defaults, the location on the Analytics host is:

<PT_HOME>\ptanalytics\1.2\serverpackages\analytics.ptc

5. Click **Load Package**.
6. Check the box next to **Overwrite Remote Servers**.
7. Click **Finish**.

5

Accessing the Plumtree Analytics Console and Portlets

This chapter provides information on accessing the Plumtree Analytics Console and portlet templates. It includes the following topics:

- [“Accessing the Plumtree Analytics Console”](#)
- [“Accessing the Plumtree Analytics Portlet Templates” on page 5-2](#)
- [“Creating Analytics Portlets” on page 5-2](#)
- [“Publishing Analytics Reports” on page 5-3](#)

Accessing the Plumtree Analytics Console

After you have registered Plumtree Analytics with the portal, you can access the Plumtree Analytics Console through your Communities.

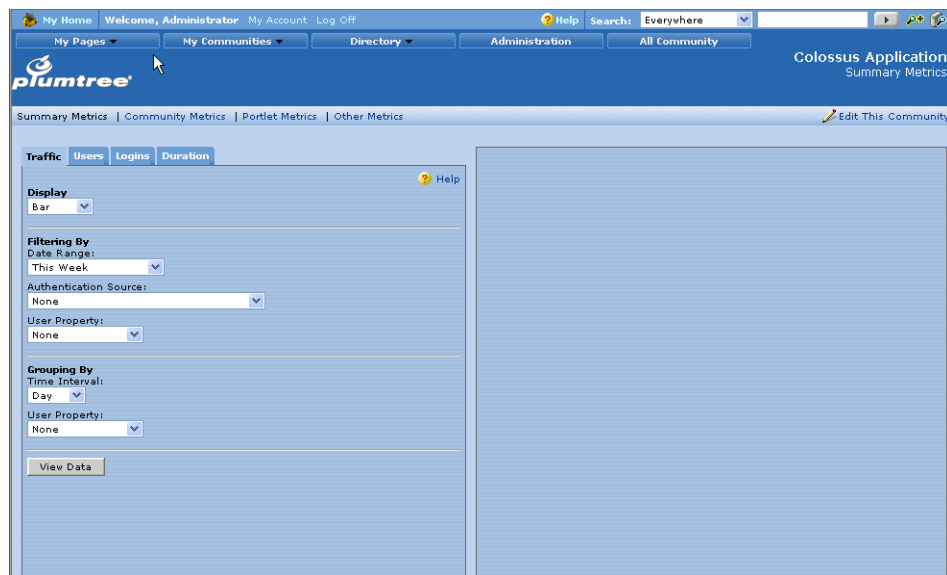
To access the Plumtree Analytics Console:

1. Log in to the portal as an administrator.
2. Choose **My Communities | Analytics Console**.

Note: If you cannot log in to the portal as the administrator, you must join the Analytics Console community in order to add it to your My Communities list.

The Analytics Console appears, as shown in the following figure.

Figure 5-1: Plumtree Analytics Console



For detailed information on the metrics provided in the Analytics Console, click the link for online help.



Note: Analytics begins tracking usage after it has been installed and the Analytics Sync job has completed. The Analytics Console cannot report metrics for activity prior to this initialization, so you should not expect data for activity prior to initialization.

Accessing the Plumtree Analytics Portlet Templates

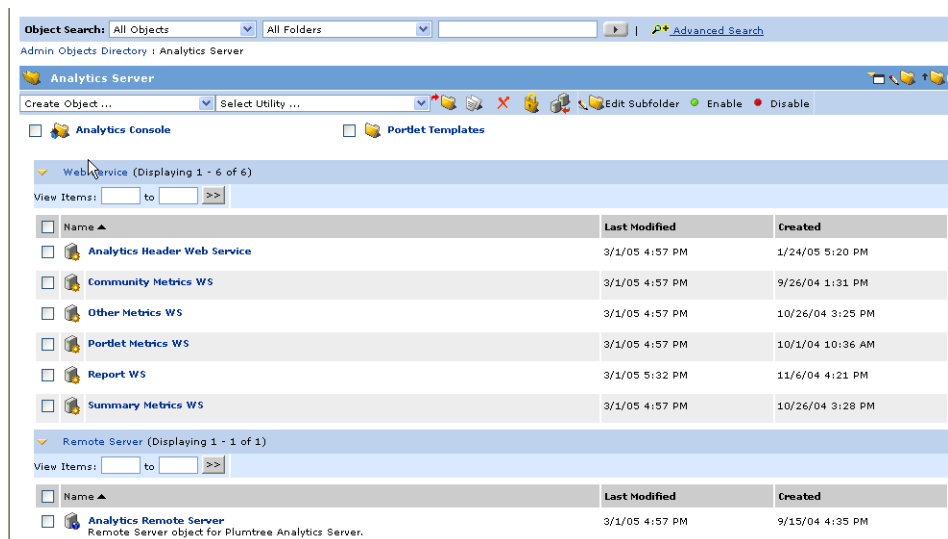
After you have registered the Plumtree Analytics with the portal, you can access the Plumtree Analytics portlet templates through the Admin Objects directory.

To access the Plumtree Analytics portlet templates:

1. Log in to the portal as an administrator.
2. Click the **Administration** tab.
3. Click the **Analytics** folder.

The folder contains the **Remote Server**, **Web Service**, **Portlets**, and **Portlet Templates** subfolders, as shown in the following figure.

Figure 5-2: Plumtree Analytics Administration Folder



The Remote Server, Web Service, and Portlet objects are used by the Analytics Console and do not require modification.

Creating Analytics Portlets

You can use the Plumtree Analytics portlet templates to create portlets that provide custom usage reports. For information on creating portlets from portlet templates, refer to the *Administrator Guide for Plumtree Foundation*.

When you create portlets, be sure to consider security and privacy issues, described next.

Publishing Analytics Reports

Plumtree Analytics reports are intended to make usage metrics visible to a limited set of administrative users who perform particular business functions, such as capacity planning, QoS analysis, ROI analysis, “best bet” customization for Search, and the like.

The Plumtree Analytics Console and portlet reports contain usage data that is valuable for enterprise portal analysis but might be regarded as private or sensitive to portal users. For example, Search, Document, Community, and Portlet reports can be configured to display activity metrics for a particular user, based on several user properties, such as Email Address, First Name, or Last Name.

To protect security and privacy interests before you roll out Analytics reports:

1. Manage administrative access to Plumtree Analytics Console and portlet templates.

To ensure only a limited number of administrative users can add the Analytics Console community to their My Communities or create portlets based on the Plumtree Analytics Portlet Templates, create a new administrative group and manage group membership accordingly.

Members of this administrative group require Read access to the Analytics Console community and Select access to the Admin Objects directory that contains the portlet templates.

2. Manage user access to Plumtree Analytics portlets.

When you create portlets, configure metrics that do not contain private or sensitive data unless such a view is particularly intended.

If the metrics in the report do contain private or sensitive data, configure security so that only appropriate, specified users have Select access and can therefore add the portlet to their My Pages.

3. Ensure that guest users are never allowed to add Analytics portlets to their My Pages.

For information on creating administrative groups and managing user and guest access to portal objects, see the *Administrator Guide for Plumtree Foundation*.



Note: Users should not add many Analytics portlets to a single My Page. The more portlets you add to a My Page, the slower the performance. If users experience unacceptable performance or time-outs, you can recommend that they include fewer Analytics portlets on each My Page.

6

Troubleshooting

This chapter provides information on troubleshooting the installation and configuration process. It includes the following topics:

- [“Reviewing Logs”](#)
- [“Troubleshooting Common Configuration Problems”](#)

Reviewing Logs

On Windows, the Plumtree installer writes an installation log to the following location:

C:\Program Files\plumtree

On Windows, the Plumtree Analytics writes application logs in the following location:

C:\Program Files\plumtree\ptanalytics\1.2\logs

On UNIX or Linux, the Plumtree installer writes an installation log to the following location:

/opt/plumtree/

On UNIX or Linux, the Plumtree Analytics writes application logs in the following location:

/opt/plumtree/ptanalytics/1.2/logs

Troubleshooting Common Configuration Problems

This section lists common problems and their solutions.

Configurator errors when testing configuration connectivity.	
Problem	When you complete the Plumtree Analytics Configurator, connectivity is tested and errors are generated.
Cause	Incorrect information provided to the Configurator.
Solution	Double check the information provided to the Configurator for accuracy, spelling and letter case. Re-run the Configurator.
No data are being generated in the report.	
Problem	The Analytics reports are not being populated with data after Analytics is installed.

Cause 1	The portal server Analytics plug-in has the incorrect server name for the Analytics Remote Server Component.
Solution 1	Re-run the installer on the portal server, providing the correct information. For details, see “Installing the Plumtree Analytics Portal Component” on page 4-6.
Cause 2	The Analytics Collector is not running.
Solution 2	Verify the Analytics Collector is started. For details, see “Starting Plumtree Analytics and Portal Services” on page 4-8.
Cause 3	The Analytics server is installed on the same host as the portal server, but the Plumtree Message Bus is not configured to multicast.
Solution 3	<p>Enable the portal to send events to Analytics in multicast mode:</p> <ol style="list-style-type: none"> 1. Open PortalAnalyticsConfig.xml for edit. The file is located in [PT_HOME]\settings\ptanalytics. 2. Replace the line that begins with <UNICAST_IP> with: <pre><UNICAST_IP>* </UNICAST_IP></pre> <ol style="list-style-type: none"> 3. Restart the portal. <p>Note: If there are other Analytics Servers deployed on the same subnet, the data collected may get corrupted with events from other portal(s).</p>
Unacceptable portlet performance.	
Problem	Users are experiencing unacceptable performance or timeouts when using the Analytics portlets.
Cause	Too many Analytics portlets have been added to a single My Page.
Solution	Encourage users to include fewer Analytics portlets on a single My Page.

7

Upgrading and Uninstalling Plumtree Analytics

This section includes information on how to upgrade and uninstall Plumtree Analytics. It includes the following sections:

- [“Upgrading Plumtree Analytics” on page 7-1](#)
- [“Uninstalling Plumtree Analytics” on page 7-2](#)

Upgrading Plumtree Analytics

To upgrade to Plumtree Analytics 1.2 from a previous version:

1. Install the Plumtree Analytics remote server component. For details, see [“Installing the Plumtree Analytics Remote Server Component” on page 4-1](#)



Important: If you are choosing the same location as the existing software, accept the default Installation Folder location when prompted. When the message box appears asking if you wish to upgrade your product version, select **yes** to upgrade.



Note: The script file **sync.bat** is replaced during the 1.2 upgrade. If you have made customizations to **sync.bat**, you will need to reapply those customizations.

2. If upgrading from Plumtree Analytics Server 1.0, upgrade the Analytics database. To Upgrade the Analytics database, run the **upgrade_1.0_to_1.2.sql** script:

```
<install dir>\ptanalytics\1.2\sql<database>\upgrade_1.0_to_1.2.sql
```



Note: When upgrading from Analytics Server 1.1, no database script needs to be run.

3. If upgrading from Plumtree Analytics Server 1.0, upgrade Community Visits. To Upgrade Community Visits, run the **communityvisitupgrade.bat** script

```
<install dir>\ptanalytics\1.2\bin\communityvisitupgrade.bat
```



Note: When upgrading from Analytics Server 1.1, the communityvisitupgrade.bat script does not need to be run.

4. Reconfigure Plumtree Analytics by running the Plumtree Analytics Configurator. For details, see [“Configuring Plumtree Analytics” on page 4-4](#)
5. Run the **Analytics Server Sync** job. For details, see [“Starting Plumtree Analytics and Portal Services” on page 4-8](#).
6. Install the Plumtree Analytics Portal component. For details, see [“Installing the Plumtree Analytics Portal Component” on page 4-6](#)



Important: Upon upgrading to Analytics 1.2 the port used to send event metrics from the portal server(s) to the Analytics server will be modified to 31313. Please ensure that this port is open

between the portal server(s) and the Analytics Server. For a list of other ports used by Analytics, see [“Ports Required by Plumtree Analytics” on page 3-2](#).

7. Install the Plumtree Analytics Image Service component. For details, [“Installing the Plumtree Analytics Image Service Component” on page 4-7](#)
8. Stop and restart the Analytics services. For details, see [“Starting Plumtree Analytics and Portal Services” on page 4-8](#).
9. Register the Plumtree Analytics Server application, remote server, Web services, and portlets with the portal. For details, see [“Registering Plumtree Analytics with the Plumtree Foundation” on page 4-9](#).

Uninstalling Plumtree Analytics

To uninstall Plumtree Analytics on Windows:

- Use the Windows Control Panel Add/Remove Program utility to launch the Plumtree Analytics uninstall wizard.

To uninstall Plumtree Analytics on UNIX and Linux platforms:

- Launch the uninstaller for Plumtree Analytics 1.2 by running:

`/opt/plumtree/uninstall/ptanalytics/<version>/Uninstall_Plumtree_Analytics`

- Launch the uninstaller for Plumtree Analytics 1.1 or earlier by running:

`/opt/plumtree/uninstall/ptanalytics/<version>/uninstall_plumtree_analytics_server`

A Analytics Server Configuration Worksheet

Setting	Example	Your Value
Analytics Host Computer	analytics-host	
Installation Folder	C:\Program Files\plumtree	
Analytics Application Port	11944	
Analytics Fully Qualified Domain Name	analytics-host.company.com	
Analytics Database Server Type	SQL Server	
Analytics Database Server Name	analytics-db-server	
Analytics Database Server Port	1433	
Analytics Database Name/SID	ptanalytics	
Analytics Database User Name	ptanalyticsuser	
Analytics Database Password		
Analytics Data Initialization		
Start Year	2005	
Stop Year	2007	
Visit Time-out (seconds)	120	
Active User Time-out (days)	7	
Portal Host Computer	portal-host	
Installation Folder	C:\Program Files\plumtree\ptportal\6.0	
API Service URL	http:// <api_service_machine_name>:11905/ ptapi/services/QueryInterfaceAPI	
Portal Username	Administrator	
Portal Password		
Image Service Host Computer	image-service-host	
Installation Folder	C:\Program Files\plumtree\ptimages	
Portal Database Server Type	SQL Server	
Portal Database Server Name	portal-dbserver	
Portal Database Server Port	1433	
Portal Database Name/SID	portal50	
Portal Database User Name	plumdbuser	
Portal Database Password		
Collab Database Server Type	SQL Server	
Collab Database Server Name	collab-dbserver	
Collab Database Server Port	1433	
Collab Database Name/SID	ptcollabdb	
Collab Database User Name	ptcollabdbuser	
Collab Database Password		
Collab Linked Portal DB User Name	plumdbuser	



Note: For Analytics Data Initialization:

- **Start Year:** The first year in which you plan to gather metrics.
- **Stop Year:** The last year in which you plan to gather metrics. It is recommended that you set the stop year no more than several years out so that you do not take up unnecessary space in your database.
- **Visit Time-out (seconds):** This field is used to calculate a user's portal visit duration. When a user does not interact with the portal within the 'Visit Timeout' Analytics will initiate a new portal visit the next time the user interacts with the portal.
- **Active User Time-out (days):** This field is used to calculate user inactivity. When a user does not use the portal within the specified 'Active User Timeout', that user is considered inactive. Upon installation, the user's status will NOT change until the time you specify has passed.