



# **BEA**AquaLogic™ Interaction Portlet Suite for Documentum

## **Installation and Upgrade Guide**

Version 4.1  
Document Revised: October 16, 2006

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# Table of Contents

## 1. Welcome to AquaLogic Interaction Portlet Suite - Documentum

How to Use This Book .....	1-2
Audience .....	1-2
Organization .....	1-2
Typographical Conventions .....	1-3
BEA Documentation and Resources .....	1-3

## 2. Completing Pre-Installation Procedures

Hardware and Software Requirements .....	2-2
Setting the PT_HOME System Variable for the Documentum Portlets Host Computer .....	2-3
Setting the PT_HOME Environment Variable .....	2-3
Configuring the Documentum DFC Runtime Environment .....	2-4

## 3. Installing, Upgrading, and Deploying the Documentum Portlets

Installing or Updating Product Files .....	3-2
Deploying the Documentum Portlets Package to Your Application Server .....	3-2
Setting PT_HOME for the Web Application .....	3-3
Verifying Your Deployment .....	3-4

## 4. Registering with the Portal

Registering the Documentum Portlets in AquaLogic Interaction 6.1 or Plumtree Foundation 6.0.x . . . . .	4-1
Registering the Documentum Portlets with Plumtree Corporate Portal 5.0.x . . . . .	4-2

## 5. Uninstalling AquaLogic Interaction Portlet Suite - Documentum

## 6. Troubleshooting

Reviewing Log Files . . . . .	6-1
Modifying Configuration Files. . . . .	6-1
Diagnosing Unexpected Results. . . . .	6-2

# Welcome to AquaLogic Interaction Portlet Suite - Documentum

AquaLogic Interaction Portlet Suite - Documentum provides portlets that offer visibility into the Documentum repository. The suite includes the following portlets:

- **Advanced Search.** The Advanced Search portlet allows you to search indexed text and properties.
- **Cabinets.** The Cabinets portlet provides access to the contents of a Docbase - cabinets, folders and files. You can use the Cabinets portlet to manage the Contents of the Docbase.
- **Categories.** Categories provide an alternate way to organize files in the Docbase. This is useful when files should be organized one way for one purpose (such as for publication to Web sites) and organized another way for another purpose, such as by internal users.
- **Home Cabinet.** The highest level of file storage in a Docbase is the Docbase's cabinets. The Home Cabinet allows you to store personal documents, folders and other items.
- **Inbox.** The Inbox portlet is similar to the Inbox in your electronic mail program. When other Docbase users send documents to you, you are notified in your Inbox. If you participate in a workflow, then you will receive task notifications in your Inbox.
- **Recent Files.** The Recent Files portlet displays both the files that you currently have checked out as well as files that you have recently checked out and checked back in.
- **Subscriptions.** You might want to subscribe to files you use often or have an interest in. The Subscriptions Portlet displays the list of files you have subscribed to.

- **Workflows.** A workflow is a business process that assigns tasks to specific users in sequence and that (optionally) routes the files involved in the tasks. When a user completes a task, the workflow notifies the next user in sequence.

## How to Use This Book

This book describes how to install and deploy AquaLogic Interaction Portlet Suite - Documentum 4.1. It also provides instructions for upgrading to Documentum Portlets 4.1 from earlier versions.

## Audience

This guide is written for the user responsible for installing or upgrading Documentum Portlets. This user must have an understanding of the existing portal deployment, knowledge of how to administer objects in the portal, and knowledge of the security required for your Documentum system.

## Organization

This guide includes the following chapters:

- This chapter provides information on how to use this guide and describes other resources available to help install, deploy, upgrade, and administer Documentum Portlets.
- [Chapter 2, “Completing Pre-Installation Procedures,”](#) provides hardware and software requirements, as well as environmental and third-party software prerequisites. You must read this chapter and meet the prerequisites prior to proceeding to the installation or upgrade.
- [Chapter 3, “Installing, Upgrading, and Deploying the Documentum Portlets,”](#) provides detailed instructions for installing and configuring Documentum Portlets.
- [Chapter 4, “Registering with the Portal,”](#) provides detailed instructions for registering Documentum Portlets in the portal and configuring the file types, content crawlers, and security for Documentum Portlets.
- [Chapter 5, “Uninstalling AquaLogic Interaction Portlet Suite - Documentum,”](#) provides instructions for uninstalling Documentum Portlets.
- [Chapter 6, “Troubleshooting,”](#) provides common troubleshooting issues and solutions.

## Typographical Conventions

This book uses the following typographical conventions.

**Table 1-1 Typographical Conventions**

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none"> <li>File names</li> <li>Folder names</li> <li>Screen elements</li> </ul>	<b>bold</b>	<ul style="list-style-type: none"> <li>Upload <b>Procedures.doc</b> to the portal.</li> <li>The log files are stored in the <b>logs</b> folder.</li> <li>To save your changes, click <b>Apply Changes</b>.</li> </ul>
Text you enter	computer	Type Marketing as the name of your community.
Variables you enter	computer with angle brackets (<>)	Enter the base URL for the Remote Server. For example, <code>http://&lt;my_computer&gt;/</code> .
<ul style="list-style-type: none"> <li>New terms</li> <li>Emphasis</li> <li>Object example names</li> </ul>	<i>italic</i>	<ul style="list-style-type: none"> <li><i>Portlets</i> are Web tools embedded in your portal.</li> <li>The URI <i>must</i> be a unique number.</li> <li>The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.</li> </ul>

## BEA Documentation and Resources

This section describes other documentation and resources provided by BEA.

**Table 1-2 BEA Documentation and Resources**

Resource	Description
Release Notes	<p>These files are written for AquaLogic Interaction Portlet Suite - Documentum administrators. They include information about new features and known issues in the release.</p> <p>They are available on <a href="http://edocs.bea.com">edocs.bea.com</a> and on the application CD.</p>
Online Help	<p>The online help is written for all levels of Documentum Portlets users. It describes the user interface for Documentum Portlets and gives detailed instructions for completing tasks in Documentum Portlets.</p> <p>To access online help, click the help icon.</p>

**Table 1-2 BEA Documentation and Resources**

Resource	Description
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site ( <a href="http://dev2dev.bea.com">dev2dev.bea.com</a> ). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.
Deployment Guide	<p>This document is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment.</p> <p>It is available in electronic form (PDF) on <a href="http://edocs.bea.com">edocs.bea.com</a>.</p>
AquaLogic User Interaction Support Center	<p>The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction 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 AquaLogic User Interaction-related needs. The Support Center encompasses the following communities:</p> <p><b>Technical Support Center</b></p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p><b>User Group</b></p> <p>Visit the User Group section to collaborate with peers and view upcoming meetings.</p> <p><b>Product Center</b></p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p><b>Developer Center</b></p> <p>Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.</p> <p><b>Education Services</b></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 <a href="http://support.plumtree.com">http://support.plumtree.com</a>, contact <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a> for the appropriate access privileges.</p>



**Table 1-2 BEA Documentation and Resources**

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
Technical Support	<p>If you cannot resolve an issue using the above resources, BEA 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: <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a></p> <p>Phone Numbers:</p> <p>U.S.A. +1 866.262.PLUM (7586) or +1 415.263.1696</p> <p>Europe +44 1494 559127</p> <p>France +33 1.46.91.86.79</p> <p>Australia/NZ +61 2.9923.4030</p> <p>Asia Pacific +61 2.9931.7822</p> <p>Singapore +1 800.1811.202</p>

Welcome to AquaLogic Interaction Portlet Suite - Documentum

# Completing Pre-Installation Procedures

This section describes the following pre-installation steps that ensure successful installation:

1. Download the most up-to-date documentation from [edocs.bea.com](http://edocs.bea.com).
2. Read the product release notes for additional 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.
3. Provision host computers for your deployment and install prerequisite software. For details, see “[Hardware and Software Requirements](#)” on page 2-2.
4. Set the PT\_HOME environment variable. For details, see “[Setting the PT\\_HOME Environment Variable](#)” on page 2-3.
5. Configure the Documentum DFC Runtime Environment. For details, see “[Configuring the Documentum DFC Runtime Environment](#)” on page 2-4.

## Hardware and Software Requirements

**Note:** For the most up-to-date list of supported software for your deployment, refer to the Interoperability page in the AquaLogic User Interaction Support Center.

Component	Requirement
Remote Server Host Computer	<ul style="list-style-type: none"><li>• <b>Disk:</b> 128 MB available</li><li>• <b>Memory:</b> 512 MB RAM</li><li>• <b>Operating System:</b> Microsoft Windows 2003 Server SP1</li><li>• <b>Application Server:</b> BEA WebLogic 8.1 SP2, SP4, SP5, and 9.1</li><li>• <b>Documentum DFC Runtime Environment</b> 5.2.5 SP2</li></ul>
Portal Software	<ul style="list-style-type: none"><li>• AquaLogic Interaction 6.1</li><li>• Plumtree Foundation 6.0.x</li><li>• Plumtree Corporate Portal 5.0.x</li></ul>
Documentum Content Server	<ul style="list-style-type: none"><li>• Documentum Content Server 5.1, 5.2</li><li>• Documentum eContent Server 4.2</li></ul>
Network	<ul style="list-style-type: none"><li>• You must be able to configure communication between the Documentum Portlets host computer, the portal, and Documentum Content Server.</li><li>• If the Documentum Content Server is located on a computer outside of the portal and Documentum Portlets host computer domain, you must configure trust relations between domains.</li></ul>
Client Browser	<ul style="list-style-type: none"><li>• Internet Explorer 5.x and 6.x</li><li>• Netscape Navigator 4.08, 7.2, and 8.x (Windows)</li><li>• Netscape Navigator 4.8 (UNIX)</li><li>• Netscape Communicator 4.79</li><li>• Firefox 1.0 and 1.5</li></ul>

## Setting the PT\_HOME System Variable for the Documentum Portlets Host Computer

If you are installing AquaLogic User Interaction products on the remote server the first time, set the PT\_HOME system variable to enable communication among component products.

### Setting the PT\_HOME Environment Variable

Before proceeding with installation, you must set the PT\_HOME environment variable. To set the PT\_HOME environment variable:

1. On the Desktop, right click My Computer and choose **Properties**.
2. Click the **Advanced** tab.
3. Click **Environment Variables**.
4. In the System Variables group, click the **New** button.
5. In the New System Variable dialog box, specify **PT\_HOME** for Variable Name and **C:\bea\alui** for Variable Value.
6. Click **OK** to close the New System Variable dialog box.
7. Click **OK** to close the Environment Variables dialog box.
8. Click **OK** to close the System Properties dialog box.

**Note:** We strongly recommend you set PT\_HOME to C:\bea\alui. If you set this to a different location, be sure to specify your custom location instead of C:\bea\alui when you complete the installation and configuration steps provided in this guide.

## Configuring the Documentum DFC Runtime Environment

This section describes how to configure the Documentum components to support integration with the portlet suite. To configure the Documentum DFC Runtime Environment:

1. Install the DFC Runtime Environment as described in Documentum documentation.
2. In the DFC Runtime Environment **dmcl.ini** configuration file (this file is usually located in the **c:\documents and settings\<username>\windows** folder), modify/add the DMAPI\_CONFIGURATION section as follows:

```
[DMAPI_CONFIGURATION]
cache_queries=T
connect_pooling_enabled=T
client_locale=en
connect_recycle_interval=100
max_session_count=1000
```

3. In the Documentum Content Server **server.ini** configuration file, set the `concurrent_sessions` variable to a minimum of 1000 to support the `max_session_count` setting in the `dmcl.ini` file.

# Installing, Upgrading, and Deploying the Documentum Portlets

This section describes the following steps that ensure successful installation and deployment of the Documentum Portlets software:

1. Ensure you have performed pre-installation procedures. For details, see [“Installing, Upgrading, and Deploying the Documentum Portlets” on page 3-1](#).
2. Install product files on the Documentum Portlets host and the Image Service. For details, see [“Installing or Updating Product Files” on page 3-2](#).
3. Deploy the product package to a Web application server. For details, see [“Deploying the Documentum Portlets Package to Your Application Server” on page 3-2](#).
4. Set PT\_HOME for the Web application. For details, see [“Setting PT\\_HOME for the Web Application” on page 3-3](#).
5. Run a diagnostic test to verify successful installation and deployment. For details, see [“Verifying Your Deployment” on page 3-4](#).

## Installing or Updating Product Files

**Note:** If you have previously installed Documentum Portlets, we recommend uninstalling the earlier files before installing the current version.

To install product files:

- On the Documentum Portlets host computer, extract the **ptdctmportlets.zip** file to the `<PT_HOME>` location.

## Deploying the Documentum Portlets Package to Your Application Server

After installation you must deploy the Documentum Portlets package to your WebLogic application server. You use the WebLogic administrative console to deploy the Documentum Portlets package to the application server.

To deploy to a WebLogic application server:

1. Open the following URL in your browser: `http://<hostname>:7001/console`
2. Type your user name and password in the dialog boxes and click **Sign In**.
3. In the left column directory tree, expand the **Deployments** folder and then click the **Web Application Modules** folder.
4. In the right pane, click **Deploy a New Web Application**.
5. Select **ptdctmportlets: localhost \<PT\_HOME> \ptdctmportlets \4.1 \webapp**, and click the **Target Module** radio button.
6. On the next page, click **Deploy**.

For information on verifying successful deployment, see [“Verifying Your Deployment” on page 3-4](#).



## Setting PT\_HOME for the Web Application

If you deployed the Documentum Portlets application to a Web application server that is not the host for other AquaLogic User Interaction applications, complete the following steps to set PT\_HOME for this Web application.

1. Copy `<PT_HOME>\ptdctmportlets\4.1\settings\config\pthome.xml` to `<PT_HOME>`.
2. Open **pthome.xml** and replace `<PT_HOME>` with `C:\bea\alui` (or whatever location you gave as the value for the PT\_HOME variable).
3. Restart the Web application server.

If you deployed the Documentum Portlets application to a Web application server that is the host for other AquaLogic User Interaction applications, PT\_HOME is already set for the for the Web application. Complete the following steps to set PT\_HOME for this Web application.

1. Open the **pthome.xml** configuration file used by the existing AquaLogic User Interaction applications in a text editor. Typically, the pthome.xml file is in the `<PT_HOME>` directory if you installed software in the default `<PT_HOME>` location.
2. Add the following product section within the `<pthome>` element:

```
<product name="ptdctmportlets">
  <install version="4.1">
    <path>C:\bea\alui\ptdctmportlets\4.1</path>

    <configpath>C:\bea\alui\ptdctmportlets\4.1\settings\config
  </configpath>
  </install>
</product>
```

3. Restart the Web application server.

**Note:** Replace the `C:\bea\alui` with whatever location you specified for your `<PT_HOME>` variable

## Verifying Your Deployment

The Documentum Portlets installation provides a deployment verification utility you can use to verify successful deployment.

To verify deployment:

1. Open a Web browser to the index page for the verification utility, for example:  
`http://<RemoteServer>:7001/ptdctmportlets/custom/check/`
2. Complete the steps as described in the utilities summary page to verify the correct configuration of deployment components.

**Note:** If you encounter errors, follow instructions in the error messages or see [“Troubleshooting” on page 6-1](#).

# Registering with the Portal

After you have run the installation wizard and verified correct installation, you must register the portlets with the portal. Follow the instructions appropriate for your portal version:

- “[Registering the Documentum Portlets in AquaLogic Interaction 6.1 or Plumtree Foundation 6.0.x](#)” on page 4-1.
- “[Registering the Documentum Portlets with Plumtree Corporate Portal 5.0.x](#)” on page 4-2.

## Registering the Documentum Portlets in AquaLogic Interaction 6.1 or Plumtree Foundation 6.0.x

The Documentum Portlets are registered with the portal by importing the migration package:

1. Log in to the portal as an administrator.
2. Click **Administration**.
3. From the **Select Utility** menu, select **Migration - Import**.
4. Click **Browse** and locate the **PortletSuiteDocumentum.pte** file in **<PT\_HOME>\ptdctmportlets\4.1\serverpackages\**. Click **Open**.
5. Click **Load Package**.
6. Select **Overwrite Remote Servers**.
7. Click **Finish**.

## Registering the Documentum Portlets with Plumtree Corporate Portal 5.0.x

In Plumtree Corporate Portal 5.0.x, new portlets are registered when you migrate them into the portal using the Migration Wizard.

To register new portlets:

1. On the host computer for the Administrative Portal Server, map a network drive connection to the Documentum Portlets host computer.
2. Launch the Migration Wizard by clicking **Start | Programs | Plumtree | Migration Wizard**.
3. Log in using a portal administrator user name and password and click **Next**.
4. Choose **Import** and then click **Next**.
5. Browse to select the following file:  
`<PT_HOME>\ptdctmportlets\4.1\serverpackages\PortletSuiteDocumentum.pte`
6. Ensure that only the **Import Object ACLs** option is selected and click **Next**.
7. The View Objects in Package panel displays the objects to be imported. Verify this list and then click **Next**.
8. On the final install panel, click **Migrate**. When the migration is complete, the wizard displays a confirmation message.

The Migration Wizard creates a Documentum Portlets folder in the portal's Administrative Object Directory. The folder contains the Remote Server, Web Service, and Portlet objects that are included with the portlet suite.

9. Log in to the portal as an administrator.
10. Click **Administration**.
11. Open the **Documentum Portlets** folder.
12. Expand the Remote Server section, and click the **Documentum Portlets** Remote Server.
13. On the Main Settings page of the Remote Server Editor, in the **Base URL** box, replace the `@REMOTE_SERVER@` token with the name of the host computer and port for the Documentum Portlets host, for example: `http://remotehost:7001`.

**Note:** If you need to troubleshoot registration, review the log generated by the Migration Wizard: `<PT_HOME>\ptportal\5.0\bin\native\migrate.log`.

# Uninstalling AquaLogic Interaction Portlet Suite - Documentum

To uninstall AquaLogic Interaction Portlet Suite - Documentum:

1. Use the Windows Add/Remove Programs utility to remove the Documentum Portlets application from your remote server. The uninstaller removes the war files and Java application files that were installed.

After the installation process has completed, it is safe to delete the installation directory.

2. Remove the deployed application from the application server according to its documentation.
3. After the removal process has completed, it is safe to delete the any directories created for the portlet in the application server environment.



# Troubleshooting

This section describes how to diagnose and correct problems you might encounter when you install and deploy the Documentum Portlets application. It includes the following topics:

- [“Reviewing Log Files” on page 6-1.](#)
- [“Modifying Configuration Files” on page 6-1](#)
- [“Diagnosing Unexpected Results” on page 6-2](#)

## Reviewing Log Files

The Documentum Portlets logs its communication with the portal. These logs are contained on the Documentum Portlets host in `<PT_HOME\ptdctmportlets\4.1\settings\logs`.

## Modifying Configuration Files

If you encounter configuration problems, Customer Support might direct you to modify the Documentum Portlets configuration files. These files are located on the Documentum Portlets host in `<PT_HOME\ptdctmportlets\4.1\settings\config`. Typically, you do not need to modify these files.

## Diagnosing Unexpected Results

The following table summarizes how to diagnose and correct unexpected results.

**Table 6-1 Diagnose Unexpected Results**

Symptom	Solution
Deployment verification tool returns test failures for DFC settings.	The DFC runtime environment libraries might be misconfigured in the Web application server startup script. Ensure the location of the dfc.properties file (typically in <b>C:\Documentum\config</b> or in the DFC Install folder) and dctm.jar (typically in <b>C:\Program Files\Documentum\dctm.jar</b> or in the DFC install folder) have been set properly in the Web application server classpath configuration.