



INSTALLATION AND UPGRADE GUIDE FOR PLUMTREE PUBLISHER

Plumtree Publisher 6.2

December 2005 Update

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Welcome

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

1. Familiarize yourself with Publisher component features. For information, see [Chapter 2, “Overview of Plumtree Publisher.”](#)
2. Complete pre-installation steps, such as reading the release notes, provisioning host computers for your deployment, and configuring compatible, pre-requisite software. For information, see [Chapter 3, “Pre-Installation Steps.”](#)
3. Install Plumtree software on the Publisher host computer and the portal Image Service host computer. For information, see [Chapter 4, “Installing Publisher.”](#)
4. Complete post-installation steps, such as verifying your Publisher deployment and registering Publisher with the Plumtree Portal. For information, see [Chapter 5, “Post-Installation Steps.”](#)

If you are upgrading an existing Content Server deployment to Plumtree Publisher, you can begin with [Chapter 6, “Upgrading to Publisher from Content Server.”](#)

The remainder of this chapter describes the documentation conventions used in this book and provides a reference to additional Plumtree documentation and resources.

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">• <code>Type Marketing</code> as the name of your Community.
<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 URL <i>must</i> be a unique number.• The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.
Variables you enter	<i>italic</i> <code>computer</code>	Enter the base URL for the Portlet Server. For example, <code>http://my_computer/</code> .

Icons Used in This Book

This book uses the Note margin icon:



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.

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


Resource	Description
Deployment Guide	Before you install or set up your portal and other Plumtree applications, use the <i>Deployment Guide for the Plumtree Application Suite G6</i> to develop a specific plan for your portal deployment, including the provision of host computers for installation of portal components, the security mode for portal communication, the delegation of administrative roles, the source of users, and the source and types of documents to be made available through the portal.
Administrator Guide	This book is written for portal administrators and content managers. It describes how set up and maintain Plumtree Publisher and its components. 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.
Developer Guides, Quickstarts, API Documentation, and Sample Code	These documents are written for developers. They describe how to customize the Enterprise Web user interface and features. They are available with the product installation packages in the Plumtree Support Center and/or Developer Center.
Online Help	The online help is written for all levels of portal users. It describes the user interface for Plumtree Publisher and gives detailed instructions for completing tasks in Publisher. To access online help, click  Help in the upper-right corner of any Publisher page or dialog box.

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 Submit and track support incidents and feature requests, search the knowledge base, and download service packs and hotfixes.</p> <p>Deployment Center 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 Download products, read Release Notes, and access recent product documentation.</p> <p>Developer Center Download developer tools and documentation, get help with your development project, and interact with other developers via discussion forums.</p> <p>Education Center 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 Publisher

Plumtree Publisher enables portal users to contribute content not only to portal pages, but also to intranets, extranets, and other Web repositories. The Plumtree Publisher component is integrated with portal user management, document management, and search components to facilitate comprehensive, centralized content administration.

Plumtree Publisher includes the following components.

Component	Objects
Publisher	Publisher is a Java application that enables Web publishing.
Publisher Database	This database stores metadata for the content in Publisher
Workflow	Workflow enables content workflow and publishing management. If you are licensed for and install Publisher only to support portal branding, you do not need Workflow, and can disable it. For information on disabling Workflow, see KB article DA_222501, "Enabling and Disabling Workflow Server."
Document Repository Service	Document Repository Service provides a central storage place for large files. The Document Repository Service is also used by Plumtree Collaboration.
Publishing targets	You configure Web servers to store published content.
Search Libraries	Publisher uses Plumtree Search to index published content.
Image Service	The Image Service serves images, javascript, CSS and other static content for use by the Plumtree system.
Publisher web services	<p>Publisher includes the following standard web services:</p> <ul style="list-style-type: none">• Publisher Administration• Content Items in Workflow• Publisher Content Service• Publisher Gateway• Publisher KD• Content Submission• Most Recently Used Content• Published Content Web Service• Work List



Important: In portal deployments, Plumtree Publisher branding functionality replaces Branding Engine functionality. Follow the instructions in this guide to install the Publisher branding functionality that supports your portal deployment. For licensing requirements, contact your Plumtree sales representative.

Publisher supports the following languages:

- Chinese (Simplified)
- Chinese (Traditional)
- Dutch
- English
- French
- German
- Italian
- Japanese
- Korean
- Portuguese
- Spanish

3

Pre-Installation Steps

Before you run the Plumtree installer, complete the following steps to prepare your network and host computers for deployment of Plumtree Publisher:

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. Provision host computers and configure software dependencies for your deployment. For details, see [“Hardware and Software Requirements.”](#)
3. Complete the deployment component configuration worksheet provided in [Appendix A, “Deployment Configuration Worksheet.”](#)
4. Ensure you have administrative access to deployment components. For details, see [“Administrative User Requirements” on page 3-2.](#)
5. Create databases and users to associate with Publisher and Workflow. For details, see [“Creating Databases and Database Users for Publisher” on page 3-2.](#)

Hardware and Software Requirements

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



Important: IPv6 is not supported. You should verify that IPv6 is not enabled prior to installing this product.

Component	Requirement
Publisher Host Computer	Hardware <ul style="list-style-type: none">• Dual 1.8 GHz or higher, with 2MB L2 cache• 1 GB memory• 40 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
Database Server Host Computer	Software <ul style="list-style-type: none">• Microsoft SQL Server 2000 SP3a (Windows installation of Publisher only.)• Oracle 9i in default or Oracle RAC configuration• Oracle 10g in default or Oracle RAC configuration

Component	Requirement
Browser Requirements	<ul style="list-style-type: none"> • Administrative Users: Internet Explorer 5.5 or 6.0 • Contributing Users: Firefox 1.0, Netscape 7.2 • Browsing Users: Internet Explorer 5.0, Netscape 4.71, Safari 1.2
Portal Compatibility	This release of the Plumtree Publisher is compatible with the Plumtree Foundation 6.0. For an up-to-date list of supported versions, refer to the Interoperability page in the Support Center.

Administrative User Requirements

To install Plumtree Publisher, you must log in to the host computer as a local administrator.

To configure the database server and portal database for the Publisher deployment, you must log into the database server as a database administrator.

To create objects in the Plumtree database, you must be able to log in as the following users:

- Plumtree portal database user. For information on the portal database user, see the *Installation and Upgrade Guide for Plumtree Foundation*.
- Publisher database user. [“Creating Databases and Database Users for Publisher” on page 3-2.](#)
- Workflow database user. [“Creating Databases and Database Users for Publisher” on page 3-2.](#)

Creating Databases and Database Users for Publisher

The following topics in this section describe how to create the database objects required for Publisher and Workflow:

- [“Creating Databases and Database Users on SQL Server” on page 3-2](#)
- [“Creating Tablespace and Database Users on Oracle” on page 3-4](#)

Creating Databases and Database Users on SQL Server

To create the Publisher database user and database:

- I. Create the Publisher database with the following properties:
 - Configure the database server so that it is case-insensitive.
 - Create a database with the name you planned when you completed the worksheets provided in [Appendix A, “Deployment Configuration Worksheet.”](#)
 - Configure the initial size of the database. For a relatively small installation, configure a database that is at least 100 MB. For a large enterprise with as many as 20,000 users, configure a database that is as large as 1 GB.

2. Create the Publisher 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 designated for the Content Server database user when you completed the worksheets provided in [Appendix A, "Deployment Configuration Worksheet."](#)
 - e. In the Authentication area, choose **SQL Server Authentication** and enter the corresponding password.
 - f. On the **General** tab, in the Defaults section, select the Publisher database.
 - g. Click the **Database Access** tab.
 - h. In the **Specify which databases can be accessed by this login** box, check the Publisher database.
 - i. In the **Database roles for database_name** box, check **public** and **db_owner**
 - j. Click **OK**.
 - k. Confirm the password to complete the process.
 - l. In the navigation pane, expand the objects to display the Publisher database; right-click the Publisher database and select **Properties**.
 - m. Click the **Permissions** tab and grant all permissions to the Publisher database user.

To create the Workflow database user and database:

1. Create the Workflow database with the following properties:
 - Configure the database server so that it is case-insensitive.
 - Create a database with the name you planned when you completed the worksheets provided in [Appendix A, "Deployment Configuration Worksheet."](#)
 - Configure the initial size of the database. For a relatively small installation, configure a database that is at least 100 MB. For a large enterprise with as many as 20,000 users, configure a database that is as large as 1 GB.
2. Create the Workflow 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 designated for the Workflow Server database user when you completed the worksheets provided in [Appendix A, "Deployment Configuration Worksheet."](#)
 - e. In the Authentication area, choose **SQL Server Authentication** and enter the corresponding password.
 - f. On the **General** tab, in the Defaults section, select the Workflow database.
 - g. Click the **Database Access** tab.
 - h. In the **Specify which databases can be accessed by this login** box, check the Workflow database.

- i. In the **Database roles for *database_name*** box, check **public** and **db_owner**.
- j. Click **OK**.
- k. Confirm the password to complete the process.
- l. In the navigation pane, expand the objects to display the Workflow database; right-click the Workflow database and select **Properties**.
- m. Click the **Permissions** tab and grant all permissions to the Workflow database user.

Creating Tablespaces and Database Users on Oracle

To create the Publisher and Workflow database users:

1. On the host computer for the Foundation database server, open the Oracle Enterprise Manager Console.
2. Log into the portal database instance and create a new tablespace for Publisher.
3. Expand the storage capacity of the newly created Publisher tablespace:
 - a. Select the Publisher data file.
 - b. Click the **Storage** tab.
 - c. Click **Automatically extend data file**.
4. From Security, create a new user with the user name you designated for the Publisher database user when you completed the worksheets provided in [Appendix A, "Deployment Configuration Worksheet."](#)
5. Grant the user default ownership of the newly created Publisher tablespace.
6. Grant the user the additional **Resource** role.
7. Create a new tablespace for the Workflow.
8. Expand the storage capacity of the newly created Workflow tablespace:
 - a. Select the Workflow data file.
 - b. Click the **Storage** tab.
 - c. Click **Automatically extend data file**.
9. From Security, create a new user with the user name you designated for the Workflow database user when you completed the worksheets provided in [Appendix A, "Deployment Configuration Worksheet."](#)
10. Grant the user default ownership of the newly created Workflow tablespace.
11. Grant the user the additional **Resource** role.

4

Installing Publisher

This chapter describes how to install Plumtree Publisher software. If you are upgrading Publisher, refer to [Chapter 6, “Upgrading to Publisher from Content Server.”](#)



Note: The following instructions are for Windows, UNIX and Linux installations of Publisher. Minor differences in the installation processes are noted where appropriate.

To install Plumtree Publisher software:

1. Ensure you have completed the pre-installation steps. See [Chapter 3, “Pre-Installation Steps.”](#)
2. If the Image Service is installed on a different computer, you must also run the installer on that computer. Choose **Custom** when the installer wizard asks you to choose components to install. Install the Publisher component on the Publisher host computer, and the Image Service component when you run the installer on the computer hosting the Image Service.
3. Log in to the host computer for the Publisher deployment as the local administrator.
4. Copy the installer (For Windows, **PlumtreePublisher_v6-2.exe** and for UNIX and Linux, **PlumtreePublisher_v6-2**) to the location from which you plan to launch it.
5. Close all unnecessary applications and windows.
6. To launch the installation wizard, double-click the **PlumtreePublisher_v6-2.exe / PlumtreePublisher_v6-2** file.
7. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the configuration worksheets provided in [Appendix A, “Deployment Configuration Worksheet.”](#)

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose components	Choose Publisher or Image Service files. Workflow and Publisher Search Libraries are automatically installed with Publisher. A custom installation allows you to install Publisher and Image Service files separately.
Configuration	Choose full configuration or published content configuration. If you choose published content configuration, the installation of Publisher will only be available for redirecting to published content.
Installation Folder	Accept the default installation folder or choose a different folder in which to install Publisher.
Application Host and Port	Enter the fully qualified domain name and port number that Publisher's web components will use to handle requests. Indicate whether the components should use http or https. Example host: contentserver.mycompany.com Default port: 7087
Publisher Database	Choose either SQL Server or Oracle, the database Publisher will use. Note: Windows only. The UNIX and Linux installation is Oracle only.

Wizard Page	Description
Publisher Connection Information	Enter the database connection information. SQL Server Default port: 1433 Oracle Default port: 1521
Workflow Database	Choose either SQL Server or Oracle, the database Workflow will use. Note: Windows only. The UNIX and Linux installation is Oracle only.
Workflow Database Connection Information	Enter the database connection information. SQL Server Default port: 1433 Oracle Default port: 1521
Portal Server Database	Choose either SQL Server or Oracle, the database Publisher will use. Note: Windows only.
Portal Server Database Connection Information	Enter the database connection information. SQL Server Default port: 1433 Oracle Default port: 1521
Image Service	Enter the Image Service information. Default locations are: On Windows: C:\Program files\Plumtree\ptimages On UNIX and Linux: /opt/plumtree/ptimages.
Published Content	Choose whether to use defaults or Custom Configuration for published content; the folder locations and URL displayed are the default locations. Publisher uses the Published Content URL to access published content. The Published Content Folder stores content published by Publisher. Published Content URL: http://<computer_name>:<port>/publishedcontent Windows Published Content Folder: <install_root>\ptcs\publishedcontent UNIX and Linux Published Content Folder: /opt/plumtree/ptcs/published-content
Custom Published Content Configuration	If you chose defaults in the previous panel, this panel does not appear; however, if you chose Custom Configuration, enter the Published Content URL and Published Content Folder.
Document Repository Service Host and Port Number	Enter the fully qualified domain name and port number for the portal Document Repository Service. Example host: doc-repository.mycompany.com Default port: 8020
Search Service Host and Port Number	Enter the fully qualified domain name and port number for the Search Service. Example host: searchhost.mycompany.com Default port: 15244

Wizard Page	Description
SMTP Mail Server Information	To enable SMTP notification of Publisher events, complete SMTP server and address information. Enter the name of the SMTP server that is used for notification emails for Workflow assignments and the email address of the administrator. Example: mail.mycorp.com, portaladmin@mycorp.com
Authenticaiton Information	Specify the authentication ID and password for the Portal Server to use when it connects to Publisher. Default Authentication ID: authenticationid Note: You can change the default to be something different.
Default Language	Choose the language for searching Publisher items.

8. Click **Install** to initialize the installation process.
9. Click **Done** to exit the installer.
10. If you are on Windows, reboot your computer. If you do not reboot, some PATH environment variable changes may not take effect. If you are on UNIX or Linux, you do not need to reboot your computer.

5

Post-Installation Steps

After you run the Plumtree installer, complete the following steps:



Important: Do not start the Publisher application until after you have imported the **publisher.ptc** file in Step 2 below.

1. Import the Workflow Database Schema into the Workflow database. For details, see [“Import the Workflow Database Schema” on page 5-1.](#)
2. Register Publisher objects with the portal. For details, see [“Import the Publisher Migration Package” on page 5-2.](#)
3. Start Publisher and Workflow. For details, see [“Start Plumtree Publisher and Workflow” on page 5-3.](#)
4. Run the diagnostic tool to verify connectivity among Publisher components and the portal. For details, see [“Verify Your Publisher Installation” on page 5-3.](#)
5. Import the **published_content_portlets.ptc** file. This file provides you with templates that you can use to create portlets. For details, see [“Import the Published Content Portlets Migration Package” on page 5-4.](#)

Import the Workflow Database Schema

After you have installed the Publisher software, create the Workflow schema according to one of the following procedures:

- [“Creating the Workflow Database Schema on SQL Server” on page 5-1.](#)
- [“Creating the Workflow Database Schema on Oracle:” on page 5-2.](#)

There are no post-installation configuration steps for the Publisher database.

Creating the Workflow Database Schema on SQL Server

To create the Workflow schema:

1. Copy the **C:\Program Files\plumtree\ptworkflow\6.2\sql\mssql\create_schema.sql** file from the host computer for the Publisher to the host computer for the Workflow database.
2. On the host computer for the Workflow database, open the SQL Server Enterprise Manager and log into the Workflow database as the Workflow database user. For information on the Workflow database and database user, see [“Creating Databases and Database Users on SQL Server” on page 3-2.](#)
3. Open and execute the **create_schema.sql** script.
4. After the script has been run, open the Workflow tablespace and verify that the schema tables have been successfully created.

Creating the Workflow Database Schema on Oracle:

To configure an Oracle database for Workflow, create the database schema and increase the maximum number of cursors, as described in the following procedures.

To create the Workflow Server schema:

1. Copy the script file from the host computer for Publisher to the host computer for the portal database.
2. On the host computer for the Workflow database, open the Oracle Enterprise Manager Console.
3. Change directory to the location of the Workflow schema scripts. **<install_root>\ptworkflow\6.2\sql\oracle9.2** or **<install_root>\ptworkflow\6.2\sql\oracle10**
4. Start SQLPlus.
5. Log into the Workflow database instance as the Workflow database user. For information about the Workflow database user, see [“Creating Tablespaces and Database Users on Oracle” on page 3-4](#)
6. Type **@create_schema.sql** to execute the create_schema script.
7. After the script has been run, open the Workflow tablespace and verify that the schema tables have been successfully created.

To increase maximum cursors:

1. Log into the Oracle Enterprise Manager Console as a database administrator.
2. Select your Workflow instance.
3. Click **Configuration**.
4. Click the **All Initialization Parameters** button.
5. Look for open cursors and modify values from 300 to 10,000.

Import the Publisher Migration Package

Importing the **publisher.pte** file will create portal objects such as web services, content sources, and intrinsic portlets used by Publisher.

To migrate the Publisher .pte file:

1. Log into the Administrator Portal.
2. From the **Select Utility** drop-down choose **Migration - Import**.
3. Click **Browse** and locate the **publisher.pte** file in **<install root>\ptcs\6.2\serverpackages**. Click **Open**.
4. Click **Load Package**.
5. Check the box next to **Overwrite Remote Servers**.
6. Click **Finish**.

Start Plumtree Publisher and Workflow

Make sure the Search and Document Repository Services are running before starting the Publisher service.

Windows:

From the Service Control Manager, Start NT Service, Plumtree Publisher Service.

Or, from the command line, run

```
$ <install base>\ptcs\6.2\bin\service.bat start
```

UNIX and Linux:

From the command line, run

```
$ <install base>/ptcs/6.2/bin/service.sh start
```

For debugging / troubleshooting purposes, you can start the Publisher Service as a console program rather than in the background, so that startup messages (and errors if any) display directly in the console:

Windows:

From the command line, run

```
$ <install base>\ptcs\6.2\bin\service.bat console
```

UNIX and Linux:

From the command line, run

```
$ <install base>/ptcs/6.2/bin/service.sh console
```

On both Windows, UNIX and Linux, the console mode can be terminated by typing Ctrl-C in the console window.

To stop the Publisher Service:

Windows:

From the Service Control Manager, stop the Plumtree Publisher Service.

From the command line, run

```
$ <install base>\ptcs\6.2\bin\service.bat stop
```

UNIX and Linux:

From the command line, run

```
$ <install base>/ptcs/6.2/bin/service.sh stop
```

Verify Your Publisher Installation

To verify Publisher operation, run the diagnostic utilities included in the Publisher installation.

In a browser, access the Publisher diagnostics page:

```
http://<host>:<port>/ptcs/console/index.jsp
```

For example,
`http://dev01.plumtree.com:7087/ptcs/console/index.jsp`

Use the authentication ID and password you previously created. You should see no errors if there are no configuration problems and all supporting services (Search, Document Repository) are running.

You can also access the Workflow diagnostics page:
`http://<host>:<port>/wfconsole`
For example,
`http://dev01.plumtree.com:7087/wfconsole`

Use the error messages to correct any configuration problems. For additional troubleshooting information, see [Chapter 7, “Troubleshooting.”](#)

Import the Published Content Portlets Migration Package



Important: Publisher must be running before you import this package.

In Publisher 6.2 the default portlet templates are installed under language subfolders: **de**, **en**, **fr**, etc. If you are upgrading from Content Server 5.0.x, your existing portlet templates are upgraded but not moved into the appropriate language folder. To make the portlet templates available under the language folder, you must delete the existing templates *before* importing the **published_content_portlets.ptc** file.

In 5.0.x installs of Content Server *without* Branding, all six portlet templates are under the Published Content Portlets folder. In 5.0.x installs of Content Server with Branding, the **Header**, **Footer**, and **Content Canvas** portlet templates are under the **Content Server | Branding** folder and the **News**, **Community Directory**, and **Announcement** portlet templates are under the **Content Server | Published Content Portlets** folder.

To delete the 5.0.x portlet templates:

1. In Administration, browse to the **Content Server | Published Content Portlets** folder.
2. Choose the existing default Content Server portlet templates and click **Delete**.
3. If applicable, repeat the above process for any Content Server portlet templates in **Content Server | Branding**.

To import the Published Content Portlets migration package:

1. Log into the Administrator Portal.
2. From the **Select Utility** drop-down choose **Migration - Import**.
3. Click **Browse** and locate the **published_content_portlets.ptc** file in `<install root>\ptcs\6.2\serverpackages\`. Click **Open**.
4. Click **Load Package**.
5. Click **Finish**.

After the migration is complete, a new folder called “Portlet Templates” appears in Publisher Explorer containing the Publisher objects that comprise the default portlet templates. If you are upgrading from 6.0 or 6.1, this folder is called “Portlet Templates (2).” You can delete the old “Portlet Templates” folder and reapply any customizations to the new objects in “Portlet Templates (2).” Default templates in the old “Portlet Templates” folder are no longer used, but existing portlets created from them will continue to work.

6

Upgrading to Publisher from Content Server

This chapter discusses how to upgrade previous versions of Content Server to Publisher 6.2. The following table summarizes possible upgrade paths and upgrade documentation:

Upgrade Path	Upgrade References
5.x - 6.1 to 6.2	<p>Follow the procedures in “Upgrade Steps” on page 6-1</p> <p>If you are upgrading from 5.x, you will need to update the Web service UUIDs in the portal database. See “Upgrade The Web Services UUIDs in the Portal Database” on page 6-4</p> <p>If you are upgrading from 5.x or 6.0, see “Additional Information for Content Server 5.x and 6.0 Upgrades” on page 6-4</p>
4.x to 6.2	<p>You must first upgrade to Content Server v5.0.2 or higher, then upgrade to Publisher v6.2. Refer to the v5.x <i>Installation and Upgrade Guide for Plumtree Content Server</i>. Follow the instructions in that guide for upgrading to 5.0.4, including all of the 4.x post-upgrade instructions. Validate that you can bring up portlets in the 5.0.4 state before starting the 6.2 upgrade.</p>

Upgrade Steps

To upgrade Plumtree Content Server to Plumtree Publisher:

1. Read the release notes for a summary of features introduced or changed in this and all previous releases.
2. Ensure you have completed pre-installation steps. For details, see [Chapter 3, “Pre-Installation Steps.”](#)
3. Log in on the machine on which you will be doing the install as a local administrator. It is assumed that this is the Application Server that hosts the preexisting version of Content Server.
4. Stop the Application Server that hosts the Content Server. If you want to continue running Content Server on the same port your old application server was on, make sure to change the port used by the old application server so that no conflict of ports exists.
5. Undeploy the Content Server ptcs Web application from the Application Server. Instead of deleting the ptcs.xml file, you can rename it because you might want to revert to the ptcs.xml file from the previous installation at some point. To do this in Tomcat, rename the ptcs.xml file in the <tomcat home>/webapps folder. For Weblogic or Websphere, rename the web application called ptcs in the application server’s administrative console.
If the legacy application server will not be used for published content, then the service should be disabled or set to start manually.
6. If your published content is also deployed on the same application server as Content Server and you want to deploy it to the new Publisher / Workflow application server, you should undeploy it. To do this in Tomcat, delete the **publishedcontent.xml** file in the <tomcat home>/webapps folder. For Weblogic or Websphere, delete the Web application called published content in the application server administrative console.
7. Stop the Workflow service.

8. Back up your existing Portal Server, Content Server, and Workflow databases. Restore only if you abort the installation.
9. Install Publisher software as described in [Chapter 4, “Installing Publisher.”](#) When the installer prompts you, reboot the machine. If you do not reboot, certain PATH environment variable changes might not take effect, and you will get errors when you try to deploy and / or start the applications.
(You do not need to reboot a UNIX or Linux machine.)



Note: Although you will enter information about the default published content location and URL in a panel, Publisher 6.2 does not change your publish and preview targets upon upgrade. If you want to change your publish targets, including changing the port number, you can do this with Publisher Explorer after you complete the upgrade. Changing the publish targets also requires republishing your existing content.

10. Upgrade the Workflow database. Locate your current configuration in the table below and follow the appropriate instructions:.

Content Server Configuration	Workflow Database Upgrade Instructions
Content Server 5.x, 6.0, or 6.1; no Workflow database.	<ul style="list-style-type: none"> • Create a Workflow database and user with the information you entered in the installer. Refer to the <i>Installation and Upgrade Guide for Plumtree Publisher 6.2</i> for full details on database and user creation for the database you are using. • Log into SQL Query Analyzer or SQL Plus as the Workflow database user. <ul style="list-style-type: none"> ◦ For SQL Server: Run the script <code><install_root>\ptwork-flow\6.2\sql\mssql\create_schema.sql</code>. ◦ For Oracle: Run the script <code><install_root>\ptwork-flow\6.2\sql\oracle9.2\create_schema.sql</code>. or <code><install_root>\ptwork-flow\6.2\sql\oracle10\create_schema.sql</code> depending on your version of Oracle.
Content Server 5.x; existing Workflow database.	<ul style="list-style-type: none"> • Run the <code>create_schema.sql</code> script for your database. • Windows: Run the script <code><install_root>\ptwork-flow\6.2\bin\dbupgrade.bat</code>. • UNIX and Linux: Run the script <code><install_root>\ptwork-flow\6.2\bin\dbupgrade.sh</code>.

Content Server Configuration	Workflow Database Upgrade Instructions
Content Server 6.0; existing Workflow database	<ul style="list-style-type: none"> • Oracle: Run the script, <install_root>\ptwork- flow\6.2\sql\oracle9.2\upgrade_schema6.1.sql or <install_root>\ptwork- flow\6.2\sql\oracle10\upgrade_schema6.1.sql depending on your version of Oracle. Note: There is no upgrade_schema6.1.sql script for SQL Server. • Oracle and SQL Server: Run the script, <install_root>\ptwork- flow\6.2\sql\oracle9.2\upgrade_schema6.2.sql or <install_root>\ptwork- flow\6.2\sql\oracle10\upgrade_schema6.2.sql or <install_root>\ptwork- flow\6.2\sql\mssql\upgrade_schema6.2.sql Depending on your database server.
Content Server 6.1; existing Workflow database	<ul style="list-style-type: none"> • Oracle and SQL Server: Run the script, <install_root>\ptwork- flow\6.2\sql\oracle9.2\upgrade_schema6.2.sql or <install_root>\ptwork- flow\6.2\sql\oracle10\upgrade_schema6.2.sql or <install_root>\ptwork- flow\6.2\sql\mssql\upgrade_schema6.2.sql Depending on your database server.

11. If applicable, modify the configuration files in **<installation_folder>\ptcs\6.2\settings\config** to configure your customized settings.
12. If applicable, restore SSL certificates to **<installation_folder>\common\jre\1.4.2\lib\security**.
13. Register the Content Server objects with the portal. For details, see [“Import the Publisher Migration Package” on page 5-2](#).
14. After importing the **publisher.ptc** file, ensure that the Document Repository Service and Search Service are started. Then start Publisher.
15. Import the **published_content_portlets.ptc** file. For details, see [“Import the Published Content Portlets Migration Package” on page 5-4](#).
16. If you are upgrading from 6.0 or 6.1, you are finished; however if you are upgrading from 5.0.x, upgrade the Web Services UUIDs in the portal database. For details, see [“Upgrade The Web Services UUIDs in the Portal Database” on page 6-4](#).



Note: If your previous 5.0.x installation included a Branding Remote Server, this object can be safely deleted after upgrading to 6.2 because it is no longer used. To do so, go to your administration hierarchy, browse to the **Branding** folder and then delete the Branding Remote Server.

Upgrade The Web Services UUIDs in the Portal Database

If you have a preexisting 5.0.x Portal and Content Server installation, it contains different Web services objects for the published content portlet templates (like the News Portlet Template) and branding portlet templates (like the Header, Footer, or Canvas template). Publisher 6.2 simplifies this by replacing five distinct Web services with a single Web service.

As the final step of an upgrade from 5.0.x, you must run a script against the portal database that updates the Web service UUIDs for existing portlets to point to the newer Publisher 6.2 Web service for published content. This script affects only the portal objects that relate directly to Publisher and Workflow portlets and portlet template integration.

To upgrade your Web Services UUIDs, execute one of the following scripts:

- For a MS SQL Server portal database, log into SQL Query Analyzer as the portal database user and run the SQL script
`ptcs\6.2\sql\mssql\portal_upgrade_5.0_to_6.0.sql`.
- For an Oracle portal database, log into Oracle Enterprise Manager as the portal database user. Then open SQL*Plus and run the SQL script
`ptcs\6.2\sql\oracle9.2\portal_upgrade_5.0_to_6.0.sql`.

Additional Information for Content Server 5.x and 6.0 Upgrades

The following are important differences between Publisher 6.2 and versions of Content Server prior to Content Server 6.1:

- **Simplified Deployment:** Publisher 6.2 contains a significant change in the deployment configuration for the product. Instead of installing the product, installing a separate Application Server, and deploying a WAR file to the Application Server, Publisher 6.2 is self-contained. It includes the runtime components needed for HTTP/HTTPS processing, and it no longer requires a separate Application Server. This change makes the product easier to install and maintain.
- **Plumtree Publisher Service:** After you install or upgrade to 6.2, a single service (or daemon on UNIX and Linux) exists that starts and stops both the Publisher and Workflow applications. The service is controlled from the Service Control Manager on Windows, or from the command line on UNIX and Linux. In previous versions, Content was deployed to a separate application server, and Workflow was a standalone service. For more information on starting and stopping the Publisher Service, see [“Start Plumtree Publisher and Workflow” on page 5-3](#)
- **Single port number:** The 6.2 Publisher Service runs on a single port number. In previous versions, the Content Server Web application ran on one port number, and the Workflow Server ran on a different port number. We recommend the use of port 7087 for the 6.2 Publisher / Workflow Service. Ver-

sion 6.2 adds a `container.conf` file containing any port number settings that need to be changed after installation.

7

Troubleshooting

This chapter provides troubleshooting tips for installing and deploying Publisher. It includes the following sections:

- [“Reviewing Log Files” on page 7-1](#)
- [“Database Configuration Files” on page 7-1](#)
- [“Reconfiguring Publisher” on page 7-2](#)
- [“Diagnosing Unexpected Results” on page 7-2](#)

Reviewing Log Files

If installation fails and you are unable to complete the installer, follow the installer error messages to correct problems with software dependencies. In addition, the installer creates four separate log files and places them in the installation folder (for example, C:\program files\plumtree). The generated log files are listed below:

- Plumtree_Publisher_InstallLog.log
- content_register.log
- workflow_register.log
- imageserver_register.log (This is only created for Image Server installations).

If you encounter problems after installation, review the `<install_root>\ptcs\6.2\logs\service.log` file to help you diagnose and correct the problem.

In addition, you can use the Publisher and Workflow diagnostic pages to troubleshoot your installation. Publisher diagnostics page:

`http://<host>:<port>/ptcs/diagnosticTests.jsp`

For example,

`http://dev01.plumtree.com:7087/ptcs/diagnosticTests.jsp`

Workflow diagnostics page

`http://<host>:<page>/wfconsole`

For example,

`http://dev01.plumtree.com:7087/wfconsole`

Database Configuration Files

Two Publisher database configuration files are populated with information you entered in the Publisher installer. Later, these files may be modified if you must change a database configuration setting. The files **database.content.properties** and **database.portal.properties** are installed in the following directory:

`<install_root>\plumtree\ptcs\6.2\settings\config\`

Similarly, there is a Workflow database configuration file that is populated with information that you entered in the Publisher installer. This file, **application.conf**, is installed in the following directory:
<install_root>\plumtree\ptworkflow\6.2\settings\config

Reconfiguring Publisher

If the installation verification tool reports configuration errors, review the configuration decisions you recorded on the configuration worksheets provided in [Appendix A](#) and re-run the installer.

Diagnosing Unexpected Results

This following table provides symptom-solution interpretations for unexpected results you might encounter when you install and deploy Publisher.

Symptom	Possible Solution
When you start Publisher, the portlets time out and errors are displayed. These errors are most likely to occur when you start up the Publisher the first time after it is installed.	The Java Server Pages (.jsp pages) in your application server were not precompiled before you started Publisher for the first time. Refresh the page to resolve the errors.
An error occurs when trying to publish content where the publish target is a drive mapped to a network shared folder.	Specify a UNC path instead of a mapped drive for the publish target. For more information, see KB article DA_130773, "Problem Publishing Content Server Content To a Mapped Drive."
The Plumtree Publisher Service does not start.	The Plumtree Publisher Service attempts to connect to port 1098, which may already be in use. To change the port: <ul style="list-style-type: none"> Open <install root>\ptcs\settings\config\container.conf with a text editor. Change plumtree.container.jboss.jndi.rmi.port=1098 to indicate an unused port, for example 10098. Restart the Plumtree Publisher Service.

Symptom	Possible Solution
Port conflict, port in use, BindException	<p>Port numbers for HTTP and HTTPS are configured in <PT_HOME>/ptcs/6.2/settings/config/service.conf. Edit the http and https settings in service.conf to set the value to an available port. The service must be restarted to pick up changes made in the configuration file. Note that changes to a service port number require corresponding changes to any web service or remote server settings which may reference that port number.</p>
Memory consumption, Out of Memory Errors	<p>The maximum amount of memory, in megabytes, that the service JVM will be allowed to use is controlled by the <code>wrapper.java.maxmemory</code> property, configured in the file <PT_HOME>/ptcs/6.2/settings/config/service.conf. For example, the following line shows a maximum memory setting of 1 GB:</p> <pre>wrapper.java.maxmemory=1024</pre> <p>The setting corresponds directly to the <code>-Xmx</code> parameter used by the java executable. The default value of this setting in the config file will be adequate for most configurations. For large production configurations, especially those in which the service is installed on a dedicated host machine, this value should be set as high as possible (e.g. 1024 or 1536) but should always remain below the amount of physical RAM on the host machine.</p>

A

Deployment Configuration Worksheet

Component	Settings	Your Settings
Publisher	Publisher URL Provision a fully qualified domain name, port number, and virtual directory for the Publisher. Example: http://ptcs-host.mycompany.com:7087/ptcs	
	Published Content URL Provision a fully qualified domain name, port number, and virtual directory to which content will be published: Example: http://ptcs-host:7087/publishedcontent	
	Published Content Path Specify the path to the folder in which published content is to reside. If the published content is not stored locally on the Publisher, you may specify a UNC path. Example: \\<servername>\<sharename>\<directory>	
	Temporary Directory for Search Index Provision a temporary directory to be used during indexing. Example: C:\Program Files\plumtree\ptcs\6.2\tmp	

Component	Settings	Your Settings
Publisher Database	SQL Server Database Server Host Example: dbhost.company.com Database Server Port Example: 1433 Database Name Example: ptcldb Database User and Password Example: plumbuser / plumbtree Oracle Database Server Host Example: dbhost.company.com Database Server Port Example: 1521 Database SID Example: ptcldb Database Schema User and Password Example: plumbuser / plumbtree	
Workflow	Workflow URL Provision a fully qualified domain name, port number, and virtual directory for the Workflow Service: Example: http://ptcs-host:7087/work-flow	

Component	Settings	Your Settings
Workflow Database	<p>SQL Server</p> <p>Database Server Host Example: db-host.company.com</p> <p>Database Server Port Example: 1433</p> <p>Database Name Example: workflowdb</p> <p>Database User and Password Example: workflowdbuser</p> <p>Oracle</p> <p>Database Server Host Example: db-host.company.com</p> <p>Database Server Port Example: 1521</p> <p>Database SID Example: workflowdb</p> <p>Database Schema User and Password Example: workflowdbuser</p>	
Image Service	<p>Image Service Folder</p> <p>Specify the path to the Image Service installed with the portal. Example: C:\Program Files\plumtree\ptimages</p>	
Publishing Targets	<p>Choose the folder and URL for published content.</p> <p>Published Content URL: http://<computer_name>:<port>/published-content</p> <p>Windows Published Content Folder: C:\Program files\plumtree\ptcs\publishedcontent</p> <p>UNIX and Linux Published Content Folder: /opt/plumtree/ptcs/published-content</p>	

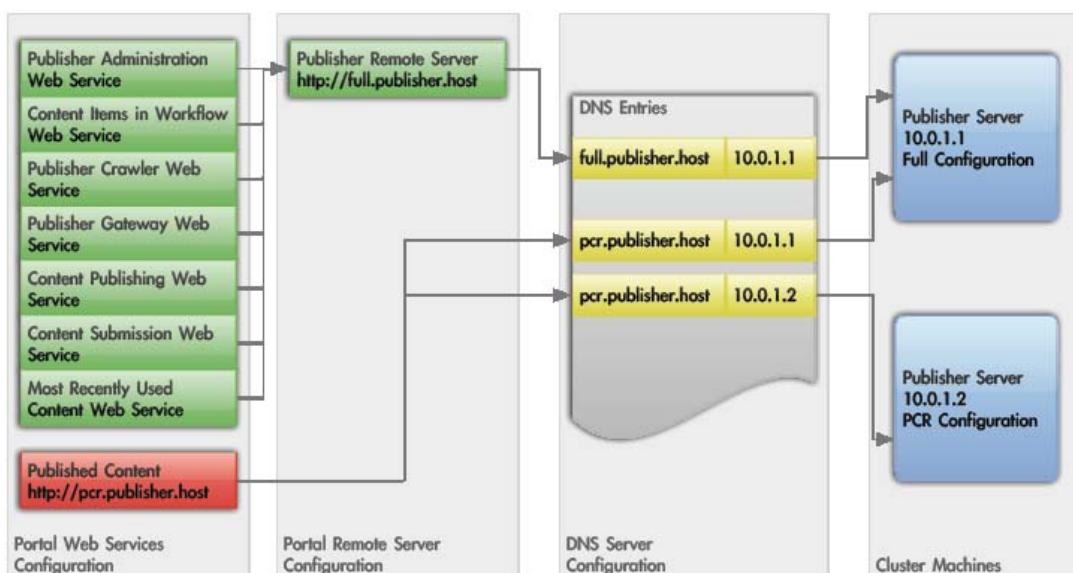
Component	Settings	Your Settings
Search Service	<p>Search Service Host Name and Port</p> <p>Identify the fully qualified domain name and port number for the portal Search Service.</p> <p>Example host: searchhost.mycompany.com</p> <p>Example port: 15244</p>	
Portal	<p>Authentication ID and Password</p> <p>Provision a user name and password for the Portal to use when it connects to Publisher.</p>	
Portal Database	<p>Identify the following properties for the portal database:</p> <p>SQL Server</p> <p>Database Server Host</p> <p>Example: db-host.company.com</p> <p>Database Server Port</p> <p>Example: 1433</p> <p>Database Name</p> <p>Example: plumdb</p> <p>Database User and Password</p> <p>Example: plumdbuser</p> <p>Oracle</p> <p>Database Server Host</p> <p>Example: db-host.company.com</p> <p>Database Server Port</p> <p>Example: 1521</p> <p>Database SID</p> <p>Example: PLUM</p> <p>Database Schema User and Password</p> <p>Example: plumdbuser</p>	

Component	Settings	Your Settings
Document Repository Service	<p>Document Repository Service Host Name and Port</p> <p>Identify the fully qualified domain name and port number for the portal Document Repository Service.</p> <p>Example host: doc-repository.mycompany.com</p> <p>Example port: 8020</p>	
SMTP Server	<p>Identify an SMTP Host Name and Email address for Publisher administrative event notices.</p> <p>Example Host: mail.company.com</p> <p>Example Address: admin@company.com</p>	

B Clustering

This chapter describes how Plumtree Publisher 6.2 supports limited clustering in order to provide high availability of published content. To install a clustered configuration you should set up an additional Publisher installation on a second machine. Then you should set up a virtual host so that the portal will attempt to access multiple machines for the Published Content web service.

The following figure gives an overview of the highly available published content configuration. The mapping of multiple IP addresses to a single machine domain name (see 'pcr.con-tent.host' in Figure I is referred to as 'virtual host').



Note: If you do not currently have any Publisher published content, you might want to create a Publisher portlet using your full Publisher installation, add it to a page, and verify the portlet is displayed correctly. After setting up the Published Content Redirector, we will use this portlet to verify that published content can still be accessed.

Deploying Published Content Separately from the Publisher in the Full Configuration

To undeploy Published Content from the default location

1. To undeploy published content from the default location, delete **<plumtree>/ptcs/container/conf/jboss.web/localhost/publishedcontent.xml**.
2. Deploy published content in any other Web server.
3. Change the publishing targets in the Publisher Explorer.

Installing the Second Publisher

Note: This is the second installation on a different machine.

Run the installer and refer to the *Installation and Upgrade Guide for Plumtree Publisher*.

1. On the Configuration Panel, select Published Content Configuration.
2. For the Publisher Database and Portal Database pages, use the same Publisher and Portal Database information that you entered for the full Publisher installation.
3. For the Authentication Information, use the same authentication information you entered for the full Publisher installation.

Configuring the Plumtree Portal

1. Set up your virtual host. This virtual host should map to your full Publisher as well as the Published Content Configuration installation. You can either use a DNS Server or the Registry. Refer to *Plumtree Knowledge Base Article #10613: INFO: MPPE Load Balancing: Frequently Asked Questions (FAQ)*.
2. Change the Published Content Web Service portlet URL:
 - a. From the homepage for the portal, click Administration.
 - b. In the Admin Objects Directory, click the folder in which the Publisher web services were created.
 - c. On the Administration page, click Published Content web service.
Note: The URL prefix is ignored if the value in the text box begins with “http://” or https://.
 - d. Under HTTP Settings, change the portlet URL by entering the full URL to the virtual host. For example, it should look something like **http://<virtual_host_name>:<virtual_host_port>/ptcs/published_content_redirect.jsp**.
 - e. Start the Published Content Configuration Publisher.
Windows: From the Service Control Manager, Start NT Service, Plumtree Content Redirector Service. From the command line, run **\$<install_root>\ptcs\6.2\bin\service.bat start**.
UNIX and Linux: From the command line, run **\$<install_base>/ptcs/6.2/bin/service.bat start**.



Note: To verify your Published Content Configuration, first look at the diagnostic page, **http://<pcs_host_name>:<port>/ptcs/console/index.jsp**. All values should either display a “NOT ENABLED” or “OK” status. Secondly, verify that you can still access your published content portlets. If you shut down your Publisher Full Configuration, you should still see your published content portlets.

C

Installer Properties File

The Plumtree installer can take a properties file as an argument to configure many portal deployment properties. The installer expects this file to exist in the directory in which it is run. If it does not use a properties file to configure portal properties, it generates a file named **PlumtreePublisher_v6-2.properties** in the directory in which it is run. You can copy this file to subsequent host computers before you run the installer. This ensures consistent data entry for the portal properties contained in the file. These properties are described in the following table.



Note: The properties file is used only for installation and does not reflect the running configuration of Publisher; you do not need the properties file to run or maintain Publisher.

The table below shows sample contents of a properties file.

Table C-1:

System Configuration/Property	Example Value
PRIMARY_IMAGE_SERVER_URL	http://<computer_name>:<port>/imageserver
SEARCH_SERVER_HOST	<computer_name>
SEARCH_SERVER_PORT	15244
PUBLISHED_CONTENT_URL	http://<computer_name>:<port>/published-content
PUBLISHED_CONTENT_PATH	Windows: C:\Program files\plumtree\ptcs\publishedcontent Solaris: /opt/plumtree/ptcs/publishedcontent
AUTHENTICATION_ID	<authenticationid>
AUTHENTICATION_PASSWORD	<plumtree>
DOCUMENT_REPOSITORY_HOST	<computer_name>
DOCUMENT_REPOSITORY_PORT	8020
PORTAL_DB_HOST	<computer_name>
PORTAL_DB_PORT	1433
PORTAL_DB_NAME	plumdb
PORTAL_DB_LOGIN	plumdbuser
PORTAL_DB_PASSWORD	<empty_field>
TEMPLATING_ENGINE_DB_HOST	<computer_name>
TEMPLATING_ENGINE_DB_PORT	1433
WORKFLOW_DB_HOST	<computer_name>
WORKFLOW_DB_PORT	1433

Table C-1:

System Configuration/Property	Example Value
WORKFLOW_DB_NAME	workflowdb
WORKFLOW_DB_LOGIN	workflowdbuser
WORKFLOW_DB_PASSWORD	<empty_field>

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