



INSTALLATION AND UPGRADE GUIDE FOR PLUMTREE STUDIO

Plumtree Studio 2.1
December 2005 Update

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Table of Contents

I	Welcome	I-1
	Typographical Conventions	I-1
	Icons Used in This Book	I-1
	Plumtree Documentation	I-2
2	Pre-Installation Requirements	2-1
	Hardware and Software Requirements	2-1
	Administrative User Requirements	2-2
3	Overview of Plumtree Studio	3-1
4	Upgrading Studio	4-1
	Upgrade Steps	4-1
	Upgrading from 1.1.x	4-2
5	Installing Studio	5-1
	Installing Plumtree Studio Software and Image Service Files on the Studio Host Computer (Windows) ..	5-1
	Installing Plumtree Studio Software	5-1
	Installing Plumtree Image Service Files for Studio on the Image Service Host Computer	5-2
	Installing Plumtree Studio Software and Image Service Files on the Studio Host Computer (UNIX and Linux)	5-3
	Pre-Install Users and Directories (UNIX and Linux)	5-3
	Installing Plumtree Studio Software (UNIX and Linux)	5-4
	Installing Plumtree Image Service Files for Studio on the Image Service Host Computer (UNIX and Linux)	5-5
6	Post-Installation Steps	6-1
	Configuring the Studio Database	6-1
	Configuring an SQL Server Database for Studio (Windows only)	6-1
	Configuring an Oracle Database for Studio	6-2
	Registering the Studio Remote Portlet Package with the Portal	6-9
	Starting Plumtree Studio	6-9
	Verifying Installation	6-10
7	Troubleshooting	7-1
	Reviewing Log Files	7-1
	Reconfiguring Studio	7-1
	Diagnosing Unexpected Results	7-2
A	Deployment Component Worksheet	A-1

Welcome

This book describes how to install and deploy Plumtree Studio. It provides details for the following basic installation steps:

1. Familiarize yourself with Studio component features. For information, see [Chapter 3, “Overview of Plumtree Studio.”](#)
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 2, “Pre-Installation Requirements.”](#)
3. Install Plumtree software on the Studio host computer and the portal Image Service host computer. For information, see [Chapter 5, “Installing Studio.”](#)
4. Complete post-installation steps, such as verifying your Studio deployment and registering Studio with the Plumtree portal. For information, see [Chapter 6, “Post-Installation Steps.”](#)

If you are upgrading your existing Studio deployment, you can begin with [Chapter 4, “Upgrading Studio.”](#)

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 URI <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 following margin icons:



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



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

Plumtree Documentation

This section describes the documentation and resources provided by Plumtree.

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


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

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 product 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, download service packs and hotfixes, and find product documentation.</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 launch examples, and calculate your return on investment (ROI).</p> <p>Developer Center</p> <p>Download developer tools, 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>415.263.1696 or 1-866-262-PLUM (7586)</td></tr> <tr> <td>Asia Pacific</td><td>+61-2-9492-1350</td></tr> <tr> <td>Europe</td><td>+44 (0)1628.589.124</td></tr> <tr> <td>France</td><td>+33-1-46-91-86-79</td></tr> <tr> <td>U.K.</td><td>01628-589-124</td></tr> </table>	U.S. and Canada	415.263.1696 or 1-866-262-PLUM (7586)	Asia Pacific	+61-2-9492-1350	Europe	+44 (0)1628.589.124	France	+33-1-46-91-86-79	U.K.	01628-589-124
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U.K.	01628-589-124										

2 Pre-Installation Requirements

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

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 dependancies for your deployment. For details, see [“Hardware and Software Requirements.”](#)
3. Complete the deployment component configuration worksheets provided in [Appendix A, “Deployment Component Worksheet.”](#)

Hardware and Software Requirements

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



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

Component	Requirement
Studio Host Computer	Hardware <ul style="list-style-type: none">• 1 GHz or higher, with 2MB L2 cache• 1 GB memory• 4 GB disk space Operating System <ul style="list-style-type: none">• Windows 2003 Server SP1• AIX 5.3, on POWER3, POWER4, POWER5• Red Hat Enterprise Linux 3 Update 3 (ES & AS), on x86• Solaris 8 and 9, on SPARC• SUSE Linux 9, on x86
Database Server Host Computer	Software <ul style="list-style-type: none">• Microsoft SQL Server 2000 SP3a (Not supported with Linux.)• Oracle 9i in default or Oracle RAC configuration• Oracle 10g in default or Oracle RAC configuration
Browser Requirements	<ul style="list-style-type: none">• Administrative Users: Internet Explorer 5.0, 5.5, or 6.0• Browsing Users: Netscape 7.2, Safari 1.2, Firefox 1.03, or Internet Explorer 5.0, 5.5, or 6.0

Component	Requirement
Portal Compatibility	This release of the Plumtree Studio 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 Studio software on a Windows machine you must log in to the host computer as a local administrator; to install Studio software on a UNIX or Linux machine you must log in as the root user.

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

3

Overview of Plumtree Studio

Plumtree Studio empowers business users with no programming or data administration knowledge to create Web applications, such as telephone lists, work order processes, calendars and surveys.

The portlets that Studio builds feature a user interface, application logic, and a database.

The core of Studio is a database of information. This database can feed one or more portlets, each of which may have more than one way of interacting with the data.

Studio includes the following portlets and templates.

Component	Objects
Studio Framework	Frameworks define the structure and functionality of portlets you develop.
Studio Portlets	<ul style="list-style-type: none">• Studio Administrator. Enables you to edit and delete portlets, as well as edit the portal and Studio database settings.• Studio Database Manager. Enables you to import data into an existing database or create a new database from an import file, as well as modify and delete Studio Server databases.
Studio Templates	<ul style="list-style-type: none">• New Studio portlet template• Studio Record Browser portlet template• Studio Record Lookup portlet template• Studio Record Summary portlet template• Studio Data Submission portlet template• Studio Poll portlet template• Studio Survey portlet template• Studio Calendar portlet template

Studio supports the following languages:

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

4 Upgrading Studio

The following table summarizes possible upgrade paths and upgrade documentation.

Upgrade Path	Upgrade References
2.0.x to 2.1	Follow the procedures in “Upgrade Steps” on page 4-1.
1.1.x to 2.1	Follow the procedures in “Upgrade Steps” on page 4-1. Then, follow the procedure in “Upgrading from 1.1.x” on page 4-2.
1.0.x to 2.1	<ol style="list-style-type: none">1. Follow the procedures in the <i>Installation and Upgrade Guide for Plumtree Studio Server, Version 1.1</i> to upgrade your Studio database to Version 1.1.2. Follow the procedures in this chapter to upgrade from Version 1.1 to the current version.

Upgrade Steps

To upgrade Plumtree Studio:

1. Read the release notes for a summary of features introduced or changed in this and all previous 2.0.x releases.
2. Ensure you have completed pre-installation steps. For details, see [Chapter 2, “Pre-Installation Requirements.”](#)
3. Back up your existing Studio Server database and the portal database.
4. If you have customized your existing Windows **C:\Program Files\plumtree\ptstudio\<version>\settings\config\PTStudioConfig.xml** file from previous installation defaults, save a copy in a new location. The installer overwrites previously installed files.
5. Undeploy the Studio Server **ptstudio** Web application from the Application Server. To do this in Tomcat, rename the **ptstudio.xml** file in the <tomcat home>/webapps folder. For Weblogic or Websphere, rename the web application **ptstudio** in the administrative console of your Application Server.
6. Install Studio software as described in [Chapter 5, “Installing Studio.”](#)



Important: You will not be running any scripts against your database.

7. Register Studio objects with the portal. For information, see [“Registering the Studio Remote Portlet Package with the Portal” on page 6-9.](#)
8. If applicable, modify:

C:\Program Files\plumtree\ptstudio\<version>\settings\config\PTStudioConfig.xml (Windows)

or

/opt/plumtree/ptstudio/<version>/settings/config/PTStudioConfig.xml (UNIX and Linux)

to configure your customized settings.

9. **If you are upgrading from 2.0.x**, you are finished.

Upgrading from 1.1.x

If you are upgrading from 1.1.x, log in to the portal as the administrator and delete the following portlets and Web services from your portal deployment:

- Plumtree Studio Gadget Manager
- Plumtree Studio Database Manager
- Plumtree Studio Gadget Administrator
- Plumtree Studio Template Administrator
- Plumtree Studio Bundle Manager
- Plumtree Studio Gadget Manager Web Service
- Plumtree Studio Database Manager Web Service
- Plumtree Studio Gadget Administrator Web Service
- Plumtree Studio Template Administrator Web Service
- Plumtree Studio Bundle Manager Web Service



Note: The naming convention for the above Web services always begins with **Plumtree Studio** followed by the Web service name. The **.pte** file imports a number of templates that have *only Studio* at the front of the name, *not Plumtree Studio*.

5

Installing Studio

This chapter describes how to install Plumtree Studio software on Windows, UNIX and Linux machines; it includes the following information:

- [“Installing Plumtree Studio Software and Image Service Files on the Studio Host Computer \(Windows\)” on page 5-1](#)
- [“Installing Plumtree Studio Software and Image Service Files on the Studio Host Computer \(UNIX and Linux\)” on page 5-3](#)

Installing Plumtree Studio Software and Image Service Files on the Studio Host Computer (Windows)

This section contains information on the following Windows specific installation procedures:

- [“Installing Plumtree Studio Software” on page 5-1](#)
- [“Installing Plumtree Image Service Files for Studio on the Image Service Host Computer” on page 5-2](#)

Installing Plumtree Studio Software

To install Plumtree Studio software:

1. Ensure you have completed pre-installation steps. For information, see [Chapter 2, “Pre-Installation Requirements.”](#)
2. Back up the Plumtree Portal database. This standard procedure ensures that you can recover if there is a problem during installation.
3. On the host machine for the Studio deployment, log in as the local administrator.
4. If your Portal Image Service is on a separate machine, you may map a network drive to the Image Service host computer. In this case, you will not need to execute the separate step [“Installing Plumtree Image Service Files for Studio on the Image Service Host Computer” on page 5-2](#).
5. Copy the installer (**PlumtreeStudio_v2-1.exe**) from the Plumtree release media to the disk location from which you plan to launch it (for example, **C:\Temp**).
6. Close all applications.
7. To launch the installation wizard, double-click the **PlumtreeStudio_v2-1.exe** file.
8. 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 Component Worksheet.”](#)



Note: The installer can reference a properties file so that installation wizard entries can be made automatically. The installer does not display the wizard pages for which it has the information

required or when the pages do not apply to the application server you will be using. If you do not have a properties file, the installer will create one upon install completion for future use.

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Select Studio, Image Service Files, or both.
Plumtree Studio - Application Port	Specify the port that the Studio web components should be using. Indicate HTTP or HTTPS.
Installation Folder	Accept the default: C:\Program Files\plumtree .
Install/Upgrade	If you are upgrading from 1.1, specify Yes ; otherwise specify No . For more information on upgrading Studio, see Chapter 4, "Upgrading Studio."
Studio Database	Select SQL Server or Oracle.
Portal Database Connection Information	Specify connection information for the Portal database. Required information is host name, port, database name or service name, login and password.
Studio Database Connection Information	Specify connection information for the Studio database. Required information is host name, port, database name or service name, login and password.
Notification Information	To enable SMTP notification of Studio events, complete SMTP server and address information.
Path to Image Service Files	Browse to select the location of the portal Image Service installation.

9. Click **Install** to initialize the installation process.

10. Click **Done** to exit the installer.

11. Reboot your computer.

Installing Plumtree Image Service Files for Studio on the Image Service Host Computer

If the studio Image Service files were to be installed on a separate machine but you were unable to map a network drive, run the installer on the Portal Image Service host computer.

To install Plumtree Studio Image Service files:

1. Ensure you have completed pre-installation steps. For information, see [Chapter 2, "Pre-Installation Requirements."](#)
2. Log in to the host computer for the portal Image Service as the local administrator.

3. Copy the installer (**PlumtreeStudio_v2-1.exe**) from the Plumtree release media to the disk location from which you plan to launch it (for example, **C:\Temp**).
4. Close all applications.
5. To launch the installation wizard, double-click the **PlumtreeStudio_v2-1.exe** file.
6. Complete the installation wizard pages as described in the following table.

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Select Image Service Content.
Path to Image Service Files	Browse to select the location of the portal Image Service installation.

7. Click **Install** to initialize the installation process.
8. Click **Done** to exit the installer.
9. Reboot your computer.

Installing Plumtree Studio Software and Image Service Files on the Studio Host Computer (UNIX and Linux)

This section contains information on the following UNIX and Linux installation procedures:

- [“Pre-Install Users and Directories \(UNIX and Linux\)” on page 5-3](#)
- [“Installing Plumtree Studio Software \(UNIX and Linux\)” on page 5-4](#)
- [“Installing Plumtree Image Service Files for Studio on the Image Service Host Computer \(UNIX and Linux\)” on page 5-5](#)

Pre-Install Users and Directories (UNIX and Linux)

If you already have Plumtree products running on the server, you may use the same identity or create a new identity to run Studio. If you have not already created an identity for Plumtree products, it is recommended that you create a new group and user to run Studio. It is important to note:

- Plumtree recommends you create local users and groups with fixed IDs. Secure deployments should avoid running Plumtree services and applications as NIS users.
- Plumtree recommends you run all Plumtree Application Suite services as the same local user. This allows an administrator to lock down the machine and audit activity.

While some of these security considerations might not be important in a development system, it is convenient to use the same standards across all systems.

Whether you are deploying to a development or production system, you need to create certain users and directories using 'root' permissions. You probably created the necessary users and directories as part of the installation of Plumtree Foundation 6.0. You will need:

- User - A UNIX or Linux user account for installing and running Plumtree components and services. The user can be local or NIS based, and can have any valid username and userid. For security reasons a local user is strongly recommended.
- Group - A UNIX or Linux group for controlling permissions on installation directories. The group can be local or NIS based, and can have any valid groupname and groupid. Again, for security reasons a local group is strongly recommended.
- Install Home - A directory with ample free disk space (>700MB) for installing Studio. The install home can be local or NFS-mounted disk.
 - Installer Configuration Home - A directory which will contain xml files that record the installation history for Plumtree components on a particular machine. The installer configuration home can be local or NFS-mounted disk.

The same values for these users, groups, and directories should be used across all machines hosting portal components.

If you are installing Studio on a machine that has Foundation 6.0 installed, you can simply reuse the users groups and directories already created.

Installing Plumtree Studio Software (UNIX and Linux)

To install Plumtree Studio software:

1. Ensure you have completed pre-installation steps. For information, see [Chapter 2, “Pre-Installation Requirements.”](#)
2. Back up the Plumtree Portal database. This standard procedure ensures that you can recover if there is a problem during installation.
3. On the host machine for Studio deployment, log in as the Plumtree user.
4. To enable installation of Studio Image Service files, mount a network drive on the portal Image Service host computer. If you are able to write files to the portal Image Service directory during this installation, you can skip [“Installing Plumtree Image Service Files for Studio on the Image Service Host Computer \(UNIX and Linux\)”](#) on page 5-5.
5. Copy the installer (**PlumtreeStudio_v2-1**) from the Plumtree release media to the disk location from which you plan to launch it.
6. To launch the installation wizard, double-click the **PlumtreeStudio_v2-1** 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 Component Worksheet.”](#)



Note: The installer can reference a properties file so that installation wizard entries can be made automatically. The installer does not display the wizard pages for which it has the information

required or when the pages do not apply to the application server you will be using. If you do not have a properties file, the installer will create one upon install completion for future use.

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Select Studio, Image Service Content, or both.
Plumtree Studio - Application Port	Specify the port that the Studio web components should be using. Indicate HTTP or HTTPS.
Installation Folder	Accept the default: /opt/plumtree/
Install/Upgrade	Specify No .
Portal Database Connection Information	Specify connection information for the Portal database. Required information is host name, port, database name or service name, login and password.
Studio Database Connection Information	Specify connection information for the Studio database. Required information is host name, port, database name or service name, login and password.
Notification Information	To enable SMTP notification of Studio events, complete SMTP server and address information.
Path to Image Service Files	<p>Browse to select the location of the portal Image Service installation.</p> <p>If you are unable to map a connection to the Image Service host computer, follow the procedures in the next section to install Studio files in the Image Service directory.</p>

8. Click **Install** to initialize the installation process.
9. Click **Done** to exit the installer.

Installing Plumtree Image Service Files for Studio on the Image Service Host Computer (UNIX and Linux)

If the Studio Image Service files were to be installed on a separate machine but you were unable to map a network drive, run the installer on the Portal Image Service host computer.

To install Plumtree Studio Image Service files:

1. Ensure you have completed pre-installation steps. For information, see [Chapter 2, “Pre-Installation Requirements.”](#)
2. Log in to the host computer for the portal Image Service. Copy the installer (**PlumtreeStudio_v2-1**) from the Plumtree release media to the disk location from which you plan to launch it.
3. To launch the installation wizard, double-click the **PlumtreeStudio_v2-1** file.

4. Complete the installation wizard pages as described in the following table.

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Select Image Service Content.
Path to Image Service Files	Browse to select the location of the portal Image Service installation.

5. Click **Done** to exit the installer.

6

Post-Installation Steps

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

1. Configure the Studio database. For information, see [“Configuring the Studio Database” on page 6-1.](#)
2. Register Studio objects with the portal. For information, see [“Registering the Studio Remote Portlet Package with the Portal” on page 6-9.](#)
3. Verify connectivity among Studio components. For information, see [“Verifying Installation” on page 6-10.](#)

Configuring the Studio Database

This section describes how to set up the Plumtree Studio database. It includes the following topics:

- [“Configuring an SQL Server Database for Studio \(Windows only\)” on page 6-1](#)
- [“Configuring an Oracle Database for Studio” on page 6-2](#)



Note: If installing on a Windows machine you may use the SQL Server or Oracle databases; UNIX and Linux users can only configure an Oracle database.

Configuring an SQL Server Database for Studio (Windows only)

This section describes how to create and configure the Studio database on SQL Server.



Important: You should configure the database only if this is a fresh install of Studio, not an upgrade.

To set up the Studio database on SQL Server:

1. Create the Studio 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 specified when you ran the Plumtree installer.
 - e. In the Authentication area, choose **SQL Server Authentication** and enter the password you specified when you ran the Plumtree installer.
 - f. Confirm the password to complete the process.
2. Create the Studio database with the following properties:
 - Configure the database server so that it is case-insensitive.
 - Create a database with the name you specified for the Studio database when you ran the Plumtree installer.
 - 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.

3. Assign database rights for the Studio 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 Studio user and select **build**.
 - d. On the General tab, in the Defaults section, select the Studio database.
 - e. Click the **Database Access** tab.
 - f. In the **Specify which databases can be accessed by this login** box, check the Studio database.
 - g. In the **Database roles for database_name** box, select **public** and **db_owner**.
 - h. Click **OK**.
 - i. In the navigation pane, expand the objects to display the Studio database;
right-click the Studio database and select **Properties**.
 - j. Click the **Permissions** tab and grant all permissions to the Studio database user.
4. Start the SQL Server Query Analyzer and use SQL Server Authentication to connect to the Studio database as the Studio database user.
5. To delete previous tables and create the tables required for the new portal components, run the **cretbl.sql** script:
 - a. To display the Open Query File dialog box, choose **File | Open**.
 - b. Browse to **C:\Program Files\plumtree\ptstudio\<version>\sql\MSSQLServer** and select the **cretbl.sql** file.
 - c. Click **Query | Execute**.
6. Close the SQL Server Query Analyzer.

Configuring an Oracle Database for Studio

This section describes how to create and configure the Oracle database for Studio. It describes the following basic steps:

1. Set up your database environment. For details, see [“Setting Up Your Database Server Environment” on page 6-2](#).
2. Customize the database scripts provided by Plumtree. For details, see [“Customizing the Oracle Database Scripts” on page 6-3](#).
3. Run the scripts to configure the Studio database. For details, see [“Creating and Configuring the Studio Database” on page 6-4](#).

Setting Up Your Database Server Environment

You must use the same database vendor and version for your Studio database as you do for your portal database. For example, if your portal database runs on Oracle Server 9i, your Studio database must also run on Oracle Server 9i. Do not mix and match database types or versions within your system.

Before you create the Studio database:

- Run the latest Oracle patch set.

- Set up the database to archive log files. With the default configuration, you must shutdown the database to get a read-consistent backup.
- Customize the Oracle database scripts, as described in the next section.

Customizing the Oracle Database Scripts

The installation wizard installs database scripts for Oracle 9i databases in the following locations:

- **C:\Program Files\plumtree\ptstudio\<version>\sql\Oracle\oracle_nt9.2** (Windows)
- **/opt/plumtree/ptstudio/<version>/sql/Oracle/oracle_unix9.2** (UNIX and Linux)

The database scripts for Oracle 10g databases are in the following locations:

- **C:\Program Files\plumtree\ptstudio\<version>\sql\Oracle\oracle_nt10** (Windows)
- **/opt/plumtree/ptstudio/<version>/sql/Oracle/oracle_unix10** (UNIX and Linux)



Note: You should only customize and run the scripts needed for your installation. Check the [“Creating and Configuring the Studio Database” on page 6-4](#) section to determine if you are creating a new database or just the tablespace.

Customize the values specified in the scripts according to the following table.

File Name	Function	Change
CreateService.bat (Windows only)	Creates an instance service for PTSTUDIO and sets the ORACLE_SID environment variable to ptstudio.	<ul style="list-style-type: none"> • Replace the default password, <code>welcome</code>, for the <code>sys</code> user with a secure password. • Make sure the location of <code>initplum.ora</code> is correct. The default is C:\oracle\ora92\database\initptstudio.ora. <p>Note: You must manually copy this file to the correct location.</p>
ShutdownPTStudio.bat (Windows only)	Shuts down Studio.	<ul style="list-style-type: none"> • Replace the default password, <code>welcome</code>, for the <code>sys</code> user with a secure password. • If necessary, change the SID.
create_studio_oracle.sql	Creates Studio schema and tablespaces.	<ul style="list-style-type: none"> • If necessary, change the location of <code>tmp1PTSTUDIO.dbf</code> (the temporary tablespace) and <code>data1PTSTUDIO.dbf</code> (the Studio tablespaces). • If necessary, replace the default user, <code>studioapp</code>, with the user that will run the Plumtree Studio database. • If necessary, replace the default password, <code>studioapp</code>, for the Plumtree Studio database user with a secure password.
crdbl.sql	Creates the database.	<ul style="list-style-type: none"> • If necessary, change the location of <code>log1PTSTUDIO.dbf</code>, <code>log2PTSTUDIO.dbf</code>, and <code>log3PTSTUDIO.dbf</code> (the log files) and <code>systPTSTUDIO.dbf</code> (the system tablespace files). • If necessary, change the SID.

File Name	Function	Change
crdb2.sql	Creates and configures the default Studio database tablespaces.	
initptstudio.ora	Stores the database configuration settings.	<ul style="list-style-type: none"> •The Oracle DBA should review this script. The runtime settings default to a small database, and need to be modified to fit your Plumtree system by a qualified Oracle DBA. •If necessary, change the SID.
RegisterSIDPTSTUDIO.reg	Registers the database.	<ul style="list-style-type: none"> •Replace the default password, <code>welcome</code>, for the <code>sys</code> user with a secure password. •If necessary, change the SID.
StudioServerCreateTables_oracle.sql	Configures the Studio database schemas	

Creating and Configuring the Studio Database

This section describes how to create and configure an Oracle database for Studio. The topics in this section describe the following options:

- [“Creating and Configuring the Studio Database on Windows” on page 6-4](#)
- [“Creating and Configuring the Studio Database on UNIX and Linux” on page 6-5](#)
- [“Creating a Studio Tablespace in an Existing Database on Windows” on page 6-7](#)
- [“Creating a Studio Tablespace in an Existing Database on UNIX and Linux” on page 6-7](#)

You need to complete only one of these options to configure your Studio database.

Creating and Configuring the Studio Database on Windows

Complete the following steps:

1. On the computer where the database resides:
 - Create the folder `%ORACLE_HOME%\oradata\[ORACLE_SID]`, where `[ORACLE_SID]` is your SID, for example `%ORACLE_HOME%\oradata\PTSTUDIO`.
 - Create the folder `%ORACLE_HOME%\ptstudioscripts`.
 - Copy the Studio database scripts from the default Studio installation location into this folder. The default installation location is noted at the beginning of [“Customizing the Oracle Database Scripts” on page 6-3](#).
2. Copy `initptstudio.ora` from the `ptstudioscripts` folder to the database folder under `%ORACLE_HOME%`.
3. From the `ptstudioscripts` folder, run `RegisterSIDPTSTUDIO.reg` to set PTSTUDIO as the default Oracle database in the registry.
4. Run the `CreateService.bat` batch file from the `ptstudioscripts` folder to create an instance service for PTSTUDIO and to set the `ORACLE_SID` environment variable to PTSTUDIO.
5. Use `sql*plus` to execute `crdbl.sql` within the script directory. This script creates the Studio database. Log in as the system user to execute this script.
 - a. At the command prompt, type: `sqlplus /nolog`
 - b. Type: `connect system/<password> as sysdba`. The default password is `manager`.

- c. Execute the script by typing: @crdb1.sql

If you do not execute the script from the script directory, you must type the full pathname. For example: @C:\oracle\ora9i\ptstudioscripts\crdb1.sql

The output text appears. If the script finishes with "Statement processed with no errors," then the crdb1.sql script succeeded. The output for this script can be found in **1-rdbms.lst**.

6. As the system user, execute **crdb2.sql** to create the required tablespaces and the Plumtree Studio database user. Type: @crdb2.sql.

If you do not execute the script from the script directory, you must type the full path name. For example: @C:\oracle\ora9i\ptstudioscripts\crdb2.sql

The output text appears. This script may take up to 40 minutes to complete. It is not as easy to determine if this script was successful. This is especially true since some errors are acceptable, such as "ORA-00942 table or view does not exist" or "ORA-1432/ORA-1434 public synonym to be dropped does not exist." The output for this script can be found in **2rdbms.lst**.

7. Exit **sql*plus**.
8. Log back in to **sql*plus** as the Studio user and execute **StudioServerCreateTables_oracle.sql** to create Studio schemas.
 - a. At the command prompt, type:


```
sqlplus <studio_user>/<password>@<SID>
```
 - b. Type: @StudioServerCreateTables_oracle.sql.

If you do not execute the script from the script directory, you must type the full pathname. For example: @C:\oracle\ora9i\ptstudioscripts\StudioServerCreateTables_oracle.sql

9. Exit **sql*plus**.

Creating and Configuring the Studio Database on UNIX and Linux

Complete the following steps:

1. Log in to the Oracle Server computer as the owner of the Oracle system files.
2. Create the folder **\$ORACLE_HOME/oradata/[ORACLE_SID]**, where [ORACLE_SID] is your SID, for example **\$ORACLE_HOME/oradata/PTSTUDIO**.
3. Create a .zip file called **ptstudiosql.zip** that includes all the SQL scripts in the appropriate installation directory. The installation location is noted at the beginning of ["Customizing the Oracle Database Scripts" on page 6-3](#).
4. FTP the **ptstudiosql.zip** file to the UNIX or Linux computer on which your database resides.
5. On the UNIX or Linux computer on which the Plumtree Portal database resides:
 - a. Log in as the Oracle user.
 - b. Create the directory **\$ORACLE_HOME/ptstudioscripts**.
 - c. Unzip the **ptstudiosql.zip** file in the **\$ORACLE_HOME/ptstudioscripts** directory.
6. Make sure that the ORACLE_HOME and ORACLE_SID variables are set.

In all the SQL script execution steps, replace ORACLE_SID with the SID or the TNS Alias (if it differs from the SID).

7. From the **ptstudioscripts** folder, copy **initptstudio.ora** under the database directory (for example, to **/opt/ora9i/database**).
8. Create an entry for the database **PTSTUDIO** in the **/var/opt/oracle/oratab** file. Add the following line to the end of the file: **PTSTUDIO:\$ORACLE_HOME:Y:**
9. Create an Oracle password file by executing the **orapwd** utility.
 - a. Go to the **\$ORACLE_HOME/bin** directory by typing the command:
`cd $ORACLE_HOME/bin.`
 - b. Then type: `./orapwd file=$ORACLE_HOME/dbs/orapwPTSTUDIO password=<password>, where <password> is the Oracle sysuser password.`
10. Use **sql*plus** to execute **crdb1.sql** within the script directory. This script creates the Studio database. Log in as the system user to execute this script.
 - a. At the command prompt, type: `sqlplus /nolog`
 - b. Type: `connect system/<password> as sysdba.` The default password is **manager**.
 - c. Execute the script by typing: `@crdb1.sql`

If you do not execute the script from the script directory, you must type the full path name. For example:

```
@/ora/ora9i/database/ptstudioscripts/crdb1.sql
```

The output text appears. If the script finishes with "Statement processed with no errors," then the **crdb1.sql** script succeeded. The output for this script can be found in **1-rdbms.lst**.

11. As the system user, execute **crdb2.sql** to create the required table spaces and the Plumtree Studio database user. Type: `@crdb2.sql`.

If you do not execute the script from the script directory, you must type the full pathname. For example:

```
@/ora/ora9i/database/ptstudioscripts/crdb2.sql
```

The output text appears. This script may take up to 40 minutes to complete. It is not as easy to determine if this script was successful. This is especially true since some errors are acceptable, such as "ORA-00942 table" or "view does not exist" or "ORA-1432/ORA-1434 public synonym to be dropped does not exist." The output for this script can be found in **2rdbms.lst**.

12. Exit **sql*plus**.
13. Log back in to **sql*plus** as the Studio user and execute **StudioServerCreateTables_oracle.sql** to create Studio schemas.
 - a. At the command prompt, type:
`sqlplus <studio_user>/<password>@<SID>`
 - b. Type: `@StudioServerCreateTables_oracle.sql`.

If you do not execute the script from the script directory, you must type the full pathname. For example: `@/ora/ora9i/database/ptstudioscripts/StudioServerCreateTables_oracle.sql`
14. Exit **sql*plus**.
15. Configure the listener for this database and start the listener.

Creating a Studio Tablespace in an Existing Database on Windows

Complete the following steps:

1. On the computer where the database resides create the folder %**ORACLE_HOME%**ptstudio-**scripts**. Copy the Studio database scripts from the default Studio installation location into the folder that you created in the previous step. The installation location is noted at the beginning of [“Customizing the Oracle Database Scripts” on page 6-3](#).
2. Use **sql*plus** to execute **create_studio_oracle.sql** within the script directory. This script creates the Studio database. Log in as the system user to execute this script.
 - a. At the command prompt, type: `sqlplus /nolog`
 - b. Type: `connect system/<password> as sysdba`. The default password is manager.
 - c. Execute the script by typing: `@create_studio_oracle.sql`

If you do not execute the script from the script directory, you must type the full path name. For example:

```
@C:\oracle\ora9i\ptstudioscripts\create_studio_oracle.sql
```

3. Exit **sql*plus**.
4. Login to **sql*plus** as the Studio user and execute **StudioServerCreateTables_oracle.sql** to create Studio schemas.
 - a. At the command prompt, type:


```
sqlplus <studio_user>/<password>@<SID>
```

 SID is the database name.
 - b. Type: `@StudioServerCreateTables_oracle.sql`.

If you do not execute the script from the script directory, you must type the full path name. For example: `@C:\oracle\ora9i\ptstudioscripts\StudioServerCreateTables_oracle.sql`

5. Exit **sql*plus**.

Creating a Studio Tablespace in an Existing Database on UNIX and Linux

Complete the following steps:

1. Log back in to the Oracle Server computer as the owner of the Oracle system files.
2. Create a .zip file called **ptstudiosql.zip** that includes all the SQL scripts in the appropriate installation directory. The installation location is noted at the beginning of [“Customizing the Oracle Database Scripts” on page 6-3](#).
3. FTP the **ptstudiosql.zip** file to the UNIX or Linux computer on which your database resides.
4. On the UNIX or Linux computer on which the Plumtree Portal database resides:
 - a. Log in as the Oracle user.
 - b. Create the directory **\$ORACLE_HOME/ptstudioscripts**.
 - c. Unzip the **ptstudiosql.zip** file in the **\$ORACLE_HOME/ptstudioscripts** directory.
5. Use **sql*plus** to execute **create_studio_oracle.sql** within the script directory. This script creates the Studio database. Log in as the system user to execute this script.
 - a. At the command prompt, type: `sqlplus /nolog`

b. **Type:** `connect system/<password> as sysdba`. The default password is `manager`.

c. **Execute the script by typing:** `@create_studio_oracle.sql`

If you do not execute the script from the script directory, you must type the full pathname. For example:

`@/ora/ora9i/database/ptstudioscripts/create_studio_oracle.sql`

6. **Exit `sql*plus`.**

7. **Login to `sql*plus` as the Studio user and execute `StudioServerCreateTables_oracle.sql` to create Studio schemas.**

a. **At the command prompt, type:**

`sqlplus <studio_user>/<password>@<SID>`

b. **Type:** `@StudioServerCreateTables_oracle.sql`.

If you do not execute the script from the script directory, you must type the full pathname. For example: `@/ora/ora9i/database/`

`ptstudioscripts/StudioServerCreateTables_oracle.sql`

8. **Exit `sql*plus`.**

9. **Configure the listener for this database and start the listener.**

Registering the Studio Remote Portlet Package with the Portal

You register the Studio portlets with the portal by importing the Studio remote portlet package.

To import the Remote Portlet Package into the portal:

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

Starting Plumtree Studio

Windows:

From the Service Control Manager, Start NT Service, Plumtree Studio service.

Or, from the command line, run

```
$ <install base>\ptstudio\2.1\bin\service.bat start
```

UNIX and Linux:

From the command line, run

```
$ <pt_home>/pthome.sh
```

```
$ <install base>/ptstudio/2.1/bin/service.sh start
```



Important: If your PT_HOME is a directory other than /opt/plumtree, you will need to edit the file <pt_home>/pthome.sh so that PT_HOME is set to the correct value.

To stop the Studio service:

Windows:

From the Service Control Manager, stop the Plumtree Studio service.

From the command line, run

```
$ <install base>\ptstudio\2.1\bin\service.bat stop
```

UNIX and Linux:

From the command line, run

```
$ <install base>/ptstudio/2.1/bin/service.sh stop
```

Verifying Installation

To verify successful installation and initial configuration:

1. If you are working on a Windows machine and have not yet done so, reboot the Studio host computer.
2. To display a diagnostics page that enables you to verify your installation, enter the following URL in your Web browser:

```
http://<host_fqd>:<port>/studio/gw?m=admin.diagnostics
```

<host_fqd> is the fully qualified domain name for the Studio host computer and <port> is its port number.

If the diagnostics page reports errors, see [Chapter 7, “Troubleshooting”](#).

7

Troubleshooting

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

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

Reviewing Log Files

If the installer fails and you are unable to complete the installation, follow the installer error messages to correct problems with software dependencies. You can also review the installation log file, **Studio_InstallLog.log**, that is saved in the directory from which you run the installer.

If you encounter problems after installation, review the log files in:

C:\Program Files\plumtree\ptstudio\<version>\settings\logs (Windows)

or

/opt/plumtree/ptstudio/<version>/settings/logs (UNIX and Linux)

to help you diagnose and correct the problem.

Reconfiguring Studio

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.

Advanced users can review and modify settings in:

C:\Program Files\plumtree\ptstudio\<version>\settings\config\PTStudioConfig.xml. (Windows)

or

/opt/plumtree/ptstudio/<version>/settings/config/PTStudioConfig.xml (UNIX and Linux)

Diagnosing Unexpected Results

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

Symptom	Solution
When you start Studio, the portlets time out.	<p>These errors are most likely to occur when you start up the Studio the first time after it is installed. The Java Server Pages (.jsp pages) were not precompiled before you started Studio for the first time.</p> <p>If you are running Studio for the first time, you might need to refresh the page a couple of times, because the .jsp pages are compiled when Studio is first accessed.</p>

Symptom	Solution
When you start up Studio, the Studio portlets do not start or fail to preload on startup.	<p>Review:</p> <p>C:\Program Files\plumtree\ptstudio\<version>\settings\logs (Windows)</p> <p>or</p> <p>/opt/plumtree/<version>/settings/logs (UNIX and Linux). If the logs contain Java errors for connection requests:</p> <ul style="list-style-type: none"> • Ensure that your Studio service is running in a healthy state; if it is not, restart it. • Ensure the portal configuration for the Studio service base URL and port are correct. <p><i>If the logs contain database connection errors:</i></p> <ul style="list-style-type: none"> • Verify that the database is up and running in a healthy state; if it is not, restart the database. • Verify connection information configured for the Studio host database server matches the running configuration in: <p>C:\Program Files\plumtree\ptstudio\<version>\settings\config\PTStudioConfig.xml (Windows).</p> <p>or /opt/plumtree/ptstudio/<version>/settings/config/PTStudioConfig.xml (UNIX and Linux).</p> <p><i>If the Studio service and database are configured correctly, verify the <PortalServerHost>\Program Files\plumtree\pthome.xml</i> (Windows) or /opt/plumtree/pthome.xml (UNIX and Linux) files include the following configuration for Studio:</p> <pre> <product name="studio"> <install version="2.1"> <path>C:\Program Files\plumtree\ptstudio\<version>\</path> <configpath>/settings/config</configpath> </install> </product> </pre>

Symptom	Solution
Port conflict, port in use, BindException	<p>Port numbers for HTTP and HTTPS are configured in <PT_HOME>/ptstudio/2.1/settings/config/application.xml. Edit the http and https settings in application.xml 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>/ptstudio/2.1/settings/config/wrapper.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 Component Worksheet

Component	Settings	Your Settings
Studio	<p>Studio URL</p> <p>Provision a fully qualified domain name, port number, and virtual directory for the Studio .</p> <p>Example: http://studio-host.mycompany.com:11935/studio</p>	
Studio 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: studiodb</p> <p>Database User and Password</p> <p>Example: studiodbuser</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-STUDIO</p> <p>Database Schema User and Password</p> <p>Example: studiodbuser</p>	

Component	Settings	Your Settings
Portal Database	<p>Identify the following properties for the portal database:</p> <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: plumdb</p> <p>Database User and Password Example: plumdbuser</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: PLUM</p> <p>Database Schema User and Password Example: plumdbuser</p>	
Image Service	<p>Image Service Path</p> <p>Identify the host and path to the portal Image Service. For example:</p> <p><host>\Program Files\plumtree\ptimages\imageserver</p> <p>or</p> <p>/opt/plumtree/ptimages/imageserver</p> <p>Before installation, map a network drive connection from the Studio host computer to this location.</p>	
SMTP Server	<p>Identify an SMTP Host Name and e-mail address for Studio administrative event notices.</p> <p>Example Host: mail.company.com</p> <p>Example Address: admin@company.com</p>	