BEA AquaLogic™ Interaction Analytics

Installation and Upgrade Guide

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CHAPTER 1

Welcome

This book describes how to install and deploy BEA AquaLogic Interaction Analytics ("Analytics") 2.0 on Windows, UNIX, and Linux platforms. It also provides instructions for upgrading to Analytics 2.0 from earlier versions.

Note: "BEA AquaLogic Interaction Analytics" is the updated product name for "Plumtree Analytics". This guide, however, still refers to some portal objects using their old Plumtree names. Also, some portal installation path examples contain Plumtree directories instead of BEA directories.

How To Use This Book

Audience

This guide is written for administrators who are responsible for installing and upgrading Analytics.

It is expected that the user of this guide has strong knowledge of the platform operating system, database, web and application servers, and any other third-party software required for the Analytics installation.

Organization

- This chapter provides introductory information about Analytics and the resources available to help install, deploy, upgrade, and administer the Analytics components.

- Chapter 2, Installation Prerequisites, provides hardware and software requirements, as well as environmental and third-party software prerequisites. This chapter must be read and prerequisites must be met prior to proceeding to the installation or upgrade.
- Chapter 3, Quickstart Overview, provides a high level overview of the Analytics installation and upgrade procedures. Sufficient detail is provided to allow an experienced portal administrator to quickly install or upgrade Analytics. Cross-references link the high level tasks to detailed procedures in other chapters.
- Chapter 4, Installation, provides detailed instructions for the installation and configuration of Analytics.
- Chapter 5, Upgrade, provides detailed instructions for upgrading to Analytics 2.0.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Example
• File names • Folder names • Screen elements	**bold**	• Upload **Procedures.doc** to the portal. • Open the **General** folder. • To save your changes, click **Apply Changes**.
• Text you enter	`computer`	• Type `Marketing` as the name of your community.
• Variables you enter	*`italic computer`*	• Enter the base URL for the Portlet Server. For example, `http://my_computer/`.
• New terms • Emphasis • Portal object example names	*italic*	• *Portlets* are Web tools, embedded in your portal. • The URI *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources (Sheet 1 of 3)

Resource	Description
Administrator guide	This book describes how to perform management, maintenance, and troubleshooting for Analytics. It is available in electronic form (PDF) in the release package and on edocs.bea.com.
Release Notes	These files are written for Analytics administrators. They include information about new features and known issues in the release. They are available in electronic form (HTML) on edocs.bea.com.
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.
Deployment Guide	This document is written for business analysts and system administrators. It describes how to plan your BEA AquaLogic User Interaction deployment. It is available in electronic form (PDF) on edocs.bea.com.
Online Help	The online help is written for all levels of Analytics users. It describes the user interface for Analytics and gives detailed instructions for completing tasks in the console and portal. To access online help, click **Help** in the upper-right corner of the portal banner or console page.

Table 1-2 BEA Documentation and Resources (Sheet 2 of 3)

Resource	Description
AquaLogic User Interaction Support Center	The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities: **Technical Support Center** Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes. **News & Events** The News & Events Center features information on rolling-out a successful deployment. Visit the Super User Group page to collaborate with peers and view upcoming meetings. **Product Center** Download products, read Release Notes, access recent product documentation, and view interoperability information. **Education Center** Find information about available training courses, purchase training credits, and register for upcoming classes. If you do not see the Support Center when you log in to http://portal.plumtree.com, contact ALUIsupport@bea.com for the appropriate access privileges.

Table 1-2 BEA Documentation and Resources (Sheet 3 of 3)

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
Technical Support	If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs. E-mail: ALUIsupport@bea.com Phone Numbers: 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

CHAPTER 2

Installation Prerequisites

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

1. Read the product release notes for information on compatibility issues, known problems, and workarounds that might affect how you proceed with your deployment. Release notes are located at the top-level directory of the product package.
2. Print the configuration worksheets provided in the Analytics Installation and Configuration Worksheets document: **Analytics_Installation_and_Configuration_Worksheets.pdf**.
3. Determine the values you have assigned for this deployment, and record these values in the Analytics Installation and Configuration Worksheets document.
4. Provision host computers for your deployment and install prerequisite software. For details, see "Hardware and Software Requirements" on page 2-1.

Hardware and Software Requirements

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

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

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

Table 2-1 Hardware and Software Requirements

Component	Requirement
Analytics Host Computer	**Hardware** • 1.6 GHz or higher, with 2MB L2 cache • 1 GB memory • 2 GB disk space **Operating System** • 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	**Hardware** • Dual 2.0 GHz or higher, with 2 MB L2 cache • 2 GB memory or higher • Mirrored SCSI drives (either 15K or 10K RPM) • Disk space to accommodate growth of the Analytics datamart. Growth is directly correlated to the number of events occurring. Events include such things as page views, portlet views, user logins, and discussion posts. Estimate 100 MB of growth per 1 million events. For example, if your portal receives roughly 1 million events per day, you should anticipate growth of 36.5 GB per year. **Software** • Microsoft SQL Server 2000 SP3a (Windows only) • Oracle 9.0.2.5 and above (in default or Oracle RAC configuration) • Oracle 10.1.0.3 and above (in default or Oracle RAC configuration)
Portal Compatibility	• Plumtree Corporate Portal 5.0.5, Plumtree Corporate Portal 5.0.5J • Plumtree Foundation 6.0 SP1
Browser	• Microsoft Internet Explorer 5.5 and above • Netscape Navigator 7.1 and above • Mozilla Firefox 1.0 and above

Table 2-1 Hardware and Software Requirements

Component	Requirement
Collaboration	• Collaboration 4.0.2 and higher
Publisher	• Publisher 6.1 and higher
Studio	• Studio 2.0.3 and higher **Note:** Analytics does not include Studio-specific reports. This requirement is for basic compatibility only.

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

- UNIX and Linux example: **export PATH=.:$PATH**
- Windows example: **set PATH=.;%PATH%**

Ports Required by Analytics

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

Table 2-2 Ports required by Analytics

Communication	Description
Portal to Analytics port 31314	Used for data collection.
Portal to Analytics port 11944	Used to display reports.
Analytics to Image Service port 80	Used to embed objects stored in the Image Service into Analytics reports.
Analytics to Portal DB and Collaboration DB. Port used depends on database implementation, for example 1433 (SQLServer) or 1521 (Oracle)	Used to synchronize data from portal or Collaboration.
Analytics to API Services machine port 11905	Used to synchronize data from the portal.

Note: These port numbers can be changed during installation and configuration of Analytics, except port 31314. This port cannot be edited.

CHAPTER 3

Quickstart Overview

This chapter provides brief, high level instructions for the installation and upgrade of Analytics, and is intended to quickly guide experienced administrators through the installation or upgrade procedure.

This chapter is divided into two major sections:

- Installation. This section covers installing and configuring the Analytics components, scripting the database, and starting and verifying the installation. The organization of this section maps directly to detailed instructions in Chapter 4, “Installation”.
- Upgrade. This section covers upgrading version of Analytics to the latest version. The organization of this section maps directly to detailed instructions in Chapter 5, “Upgrade”.

Installation

Before you install Analytics, ensure that you have completed pre-installation steps. For details, see “Installation Prerequisites” on page 2-1

Installing Analytics Services

For more complete details on performing this task, see “Installing Analytics Services” on page 4-2.

To install Analytics Services:

1. Log in to the remote server host computer as the local administrator (on Windows) or a user with directory write privileges (on UNIX or Linux).

2. Copy the installer to the disk location from which you plan to launch it.
3. Launch the Analytics Installer.
   - On a **Windows** host, the installer is **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0).
   - On a **UNIX** or **Linux** host, the installer is **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0).
4. Choose to install the **Analytics Services** component.
5. After the installer has copied all files to the installation directory, click **Done**. The Analytics Configurator will launch; however, do not complete the configuration at this time.

Configuring the Analytics Database

Perform one of the following procedures that is appropriate to your database platform:

- Creating and Setting Up a Microsoft SQL Server Database
- Creating and Setting Up an Oracle Database

Creating and Setting Up a Microsoft SQL Server Database

For more complete details on performing this task, see "Creating and Setting Up a Microsoft SQL Server Database" on page 4-3.

To create and set up a Microsoft SQL Server database:

1. Copy the scripts from **<PT_HOME>\ptanalytics\2.0\sql\mssql** to the database host computer.
2. Create the Analytics database user:
   a. In Enterprise Manager: create a new Login, using the user name you provisioned when you completed the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.
   b. In the Authentication area, choose **SQL Server Authentication** and enter, then confirm, the corresponding password.
3. Create the Analytics database with the following properties:

- Create the database with the name you provisioned when you completed the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.
- Configure the size of the database. The growth of the database is directly correlated to the number of *events* present in the system. Estimate 100 MB of growth per 1 million events. For details, see *Administrator Guide for BEA AquaLogic Interaction Analytics*.

4. Assign database rights for the Analytics database user:
   a. Assign the Analytics database user to the **public** and **db_owner** database roles for the Analytics database.
   b. In the properties of the Analytics database, grant all permissions to the Analytics database user.
5. Start the SQL Server Query Analyzer and use SQL Server Authentication to connect to the Analytics database as the Analytics database user.
6. Run the setup scripts for the database, located in the <PT_HOME>\ptanalytics\2.0\sql\mssql\ directory, in the following order (make sure that you are running the scripts on the Analytics database):
   a. db_creation.sql
   b. install_seeddata.sql
7. In SQL Service Query Analyzer, connect to the portal database as the portal database user.
8. Run the portal_security_service_install.sql setup script on the portal database, located in <PT_HOME>\ptanalytics\2.0\sql\mssql\
9. Close SQL Server Query Analyzer.

Creating and Setting Up an Oracle Database

For more complete details on performing this task, see "Creating and Setting Up an Oracle Database" on page 4-5.

To create and set up an Oracle database:

1. Copy the **oracle** directory from **<PT_HOME>\ptanalytics\2.0\sql** to the Analytics database's host computer.
2. Log on to the host computer for the Analytics database as owner of the Oracle system files.

3. Run the following scripts against your Oracle database as **sysdba**:

   a. Determine the name of the SID that you will be using for this installation. If you changed the SID from the default when you installed the portal, you need to update **create_analytics_tablespaces.sql** to reflect the SID that you used, substituting all occurrences of the default SID name with your SID name. For Plumtree Corporate Portal 5.x, the default SID name is **PLUM**. For Plumtree Foundation 6.x, the default SID name is **PLUM10**.

      If you are creating a new SID, configure AL32UTF8 as the database character set and AL16UTF16 as the national character set.

   b. Run the script **create_analytics_tablespaces.sql**.

   c. Run the script **create_analytics_user.sql**. For details on editing the script to use anything other than the default user and password, see "Creating and Setting Up an Oracle Database" on page 4-5.

   d. Add the Oracle database user and password values into the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.

   e. Run the script **create_analytics_user.sql**.

4. Execute the following steps as the **analytics** user, which you just created. The scripts that you run are located in the **oracle** directory that you copied in Step 1.

   a. Run the script **create_analytics_schema.sql**.

   b. Run the script **install_analytics_seeddata.sql**.

5. As the ALI user that you created when you installed AquaLogic Interaction, run the script **portal_security_service_install.sql** on the portal database**.** The script is located in the oracle directory that you copied in Step 1.

6. Run your database's analysis tool on the portal database to increase the efficiency of the database.

Configuring Analytics

For more complete details on performing this task, see "Configuring Analytics" on page 4-6

To configure Analytics:

1. Launch the Analytics Configurator:
   - In Windows, choose **Start | Programs | BEA | Analytics Configurator**.
   - On UNIX or Linux, open **http://localhost:11944/configurator/ui/start.jsf** in a web browser.
2. Complete the configuration pages using the values you decided on when you completed the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.
3. An installer screen appears that summarizes your configuration. Review this screen and make changes, if necessary. Otherwise, click **Update**.

Installing the Interaction Component

For more complete details on performing this task, see "Installing the Interaction Component" on page 4-12.

Install the Interaction component on all servers that host the portal. The installation instructions are the same for Windows, UNIX, and Linux hosts, with slight exceptions as noted.

Note: The Interaction component is also known as the Plumtree Analytics Portal Component, or Analytics plug-in.

Note: You must reinstall the Interaction component after each time you upgrade AquaLogic Interaction.

To install the Interaction component:

1. Log in to the portal host computer as the same user that installed AquaLogic Interaction.
2. If you are running on a Java application server, shut down the application server.
3. Launch the Analytics Installer.
   - On a **Windows** host, the installer is **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0).
   - On a **UNIX** or **Linux** host, the installer is **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0).

4. Choose to install the **Interaction component**.
5. Perform one of the following:
   - If you are running on Java, restart the application server. Then redeploy your portal.war or portal.ear file to your portal application server.
   - If you are running on IIS, restart IIS.

Installing the Image Service Component

For more complete details on performing this task, see "Installing the Image Service Component" on page 4-13.

To install the Image Service component:

1. Log in to the Image Service host computer as the local administrator or the ALI user created during installation of AquaLogic Interaction.
2. Copy the installer to the disk location from which you plan to launch it.
3. Launch the Analytics Installer.
   - On a **Windows** host, the installer is **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0).
   - On a **UNIX** or **Linux** host, the installer is **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0).
4. Choose to install the **Image Service component**.

Installing the Automation Service Component

For more complete details on performing this task, see "Installing the Automation Service Component" on page 4-14

To install the Automation Service component:

1. Log in to the Automation Service host computer as the local administrator or the ALI user created during the installation of AquaLogic Interaction.
2. Copy the installer to the disk location from which you plan to launch it.
3. Launch the Analytics Installer.
   - On a **Windows** host, the installer is **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0).

  - On a **UNIX** or **Linux** host, the installer is **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0).

4. Choose to install the **Automation Service component**.
5. Launch the Analytics Configurator:
  - In **Windows**, choose Start | Programs | BEA | Analytics Configurator.
  - On **UNIX** or **Linux**, open http://localhost:11944/configurator/ui/start.jsf in a web browser.

Starting Analytics and Portal Services

For more complete details on performing this task, see "Starting Analytics and Portal Services" on page 4-15.

To start Analytics and portal services, perform one of the following:

- On Windows, ensure the BEA AquaLogic Interaction Analytics service has been started in the Windows Control Panel. Then ensure the BEA AquaLogic Interaction Analytics Collector service has been started.
- On UNIX and Linux, ensure the BEA AquaLogic Interaction Analytics service has been started by using the command **<PT_HOME>/ptanalytics/2.0/bin/analyticsd.sh start**. Then ensure the BEA AquaLogic Interaction Analytics Collector service has been started by using the command **<PT_HOME>/ptanalytics/2.0/bin/collectord.sh start.**

Registering Analytics with the Portal

This section describes how to register the Analytics Console, remote server, web service, and portlet objects with a 6.x portal. For more complete details on performing this task, see "Registering Analytics with the Portal" on page 4-16.

To register the Analytics application, remote server, web services, and portlets with the portal, use the migration utility to import the migration package **analytics6.pte**.

For details on importing the migration package on a 5.x portal, see *Administrator Guide for Plumtree Corporate Portal.* The filename of the 5.x migration package is **analytics5.pte**.

Adding Analytics Jobs to the Automation Service

This section describes how to add all Analytics jobs to the Automation Service. Once Analytics Jobs are added to the Automation Service, the Automation Service runs them automatically. For

more complete details on performing this task, see "Adding Analytics Jobs to the Automation Service" on page 4-17

To add Analytics jobs to the Automation Service:

1. Log into the Administrator Portal.
2. In Administration, choose **Automation Service**.
3. Ensure that the Automation Service is online.
4. Under **Edit Automation Services**, click the name of the computer on which Analytics Jobs are installed.

   The Register Folders window appears.
5. Click **Add Folder**.

   The Add Job Folder window appears.
6. Expand the **Analytics** folder.
7. Select the **Analytics Jobs** folder.
8. Click **OK** to close the Register Folders window.
9. Click **Finish**.

   The Automation Service runs the Analytics jobs. If other Automation Service jobs were in queue or running when you added the Analytics jobs to the Automation Service, the Automation Service runs the Analytics jobs after these other jobs have completed.
10. At an appropriate time, ensure that the Analytics jobs have completed successfully. If any Analytics jobs failed, schedule these jobs to run again.

Upgrade

Upgrade Paths

The following table summarizes the supported database upgrade paths for Analytics.

Table 3-1 Upgrade Paths

Upgrade Path	Upgrade References
1.2 to 2.0	Follow the procedures in this chapter.
1.1 to 2.0	Follow the procedures in this chapter.

Upgrading Analytics

This section discusses:

- Upgrading Analytics from Version 1.2 to 2.0
- Upgrading Analytics from Version 1.1 to 2.0

Upgrading Analytics from Version 1.2 to 2.0

This section describes how to upgrade from Analytics 1.2 to Analytics 2.0.

To upgrade from Analytics 1.2 to Analytics 2.0:

1. Ensure that the Plumtree Analytics service is not running.
2. Ensure that the Plumtree Analytics Collector service is not running.
3. Delete the **Analytics** folder beneath the PT_HOME\common\container\tomcat\5.0.28\work directory.
4. Install Analytics Services. For details, see "Installing Analytics Services" on page 4-2. If you are choosing the same location as the existing software, accept the default installation directory location when prompted.

   Note: The script file **sync.bat** is deleted. The **AnalyticsRunJobs.bat** file is added, and is scheduled to run automatically as an Automation Service job.

5. Upgrade the Analytics database by running the **upgrade_1.x_to_2.0.sql** script: <PT_HOME>\ptanalytics\2.0\sql\<database>\upgrade_1.x_to_2.0.sql

6. Run the portal_security_service_install.sql setup script on the portal database. The script is located in <PT_HOME>\ptanalytics\2.0\sql\mssql\
7. Reconfigure Analytics by running the Analytics Configurator. For details, see "Configuring Analytics" on page 4-6
8. Partition the Analytics database tables by running the following script:
   - AnalyticsPartition.bat (Windows)**:**
     <PT_HOME>\ptanalytics\2.0\bin\AnalyticsPartition.bat
   - AnalyticsPartition.sh (UNIX)**:**
     <PT_HOME>/ptanalytics/2.0/bin/AnalyticsPartition.sh
9. **(Oracle only)** Run your database's analysis tool on both the portal and Analytics databases to increase the efficiency of the databases.
10. Install the Interaction component. For details, see "Installing the Interaction Component" on page 4-12
11. Install the Image Service component. For details, "Installing the Image Service Component" on page 4-13
12. Stop and restart the Analytics services. For details, see "Starting Analytics and Portal Services" on page 4-15.
13. Register the Analytics application, remote server, Web services, and portlets with the portal by importing the migration package. For details on performing this task on a 6.x portal, see "Registering Analytics with the Portal" on page 4-16. For details on importing the migration package on a 5.x portal, see *Administrator Guide for Plumtree Corporate Portal*.
14. Install the Automation Service component. For details, see "Installing the Automation Service Component" on page 4-14
15. Add Analytics jobs to the Automation Service. For details, see "Adding Analytics Jobs to the Automation Service" on page 4-17.

Upgrading Analytics from Version 1.1 to 2.0

This section describes how to upgrade from Analytics 1.1 to Analytics 2.0.

To upgrade from Analytics 1.1 to Analytics 2.0:

1. Ensure that the Plumtree Analytics service is not running.
2. Ensure that the Plumtree Analytics Collector service is not running.

3. Delete the **Analytics** folder beneath the PT_HOME\common\container\tomcat\5.0.28\work directory.
4. Install Analytics Services. For details, see "Installing Analytics Services" on page 4-2. If you are choosing the same location as the existing software, accept the default installation directory location when prompted.

   Note: The script file **sync.bat** is deleted. The **AnalyticsRunJobs.bat** file is added, and is scheduled to run automatically as an Automation Service job.
5. Upgrade the Analytics database by running the **upgrade_1.x_to_2.0.sql** script: <PT_HOME>\ptanalytics\2.0\sql\<database>\upgrade_1.x_to_2.0.sql
6. Run the portal_security_service_install.sql setup script on the portal database. The script is located in <PT_HOME>\ptanalytics\2.0\sql\mssql\
7. Reconfigure Analytics by running the Analytics Configurator. For details, see "Configuring Analytics" on page 4-6

   Note: When running the Analytics Configurator during the 1.1 to 2.0 upgrade, you must re-enter the API Service URL and the passwords for all databases.
8. Partition the Analytics database tables by running the following script:
   - AnalyticsPartition.bat (Windows): <PT_HOME>\ptanalytics\2.0\bin\AnalyticsPartition.bat
   - AnalyticsPartition.sh (UNIX/Linux): <PT_HOME>/ptanalytics/2.0/bin/AnalyticsPartition.sh
9. **(Oracle only)** Run your database's analysis tool on both the portal and Analytics databases to increase the efficiency of the databases.
10. Install the Interaction component. For details, see "Installing the Interaction Component" on page 4-12

    Note: Upon upgrading to Analytics 2.0 the port used to send event metrics from the portal server(s) to the Analytics Services server is modified to 31314. Ensure that this port is open between the portal server(s) and the Analytics Services server. For a list of other ports used by Analytics, see "Ports Required by Analytics" on page 2-3.
11. Install the Image Service component. For details, "Installing the Image Service Component" on page 4-13
12. Stop and restart the Analytics services. For details, see "Starting Analytics and Portal Services" on page 4-15.

13. Register the Analytics application, remote server, Web services, and portlets with the portal by importing the migration package. For details on performing this task on a 6.x portal, see "Registering Analytics with the Portal" on page 4-16. For details on importing the migration package on a 5.x portal, see *Administrator Guide for Plumtree Corporate Portal*.
14. Install the Automation Service component. For details, see "Installing the Automation Service Component" on page 4-14
15. Add Analytics jobs to the Automation Service. For details, see "Adding Analytics Jobs to the Automation Service" on page 4-17.

CHAPTER 4

Installation

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

1. Ensure you have completed pre-installation steps. For details, see “Installation Prerequisites” on page 2-1
2. Install Analytics Services on the remote server host computer. For details, see “Installing Analytics Services” on page 4-2.
3. Configure the Analytics database. For details, see “Configuring the Analytics Database” on page 4-3.
4. Configure Analytics. For details, see “Configuring Analytics” on page 4-6.
5. Install the Interaction component of the installation package on all portal servers. For details, see “Installing the Interaction Component” on page 4-12
6. Install the Image Service component of the installation package on your Image Service host. For details, see “Installing the Image Service Component” on page 4-13.
7. Install the Automation Service component of the installation package on your Automation Service host and complete the Analytics Configurator pages for the Automation Service component. For details, see “Installing the Automation Service Component” on page 4-14.
8. Start Analytics and portal services. For details, see “Starting Analytics and Portal Services” on page 4-15.
9. Register the Analytics application, remote server, web services, and portlets with the portal. For details, see “Registering Analytics with the Portal” on page 4-16.

10. Add Analytics jobs to the Automation Service. For details, see "Adding Analytics Jobs to the Automation Service" on page 4-17.

Installing Analytics Services

This section describes how to install the core application, which includes the Analytics service and the Analytics Collector service. The instructions are the same for installing on a Windows, UNIX, or Linux host, with slight exceptions as noted. To install Analytics Services:

1. Log in to the remote server host computer as the local administrator (on Windows) or a user with directory write privileges (on UNIX or Linux).
2. Copy the installer to the disk location from which you plan to launch it. The installer file is one of the following:
   - Windows: **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0)
   - UNIX: **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0)
3. Close all unnecessary applications.
4. Execute the installer file.
5. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the Analytics Services Installation Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.

Table 4-1 Installation Wizard Pages - Analytics Services

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Choose **Analytics Services**.
Installation Directory	The default is: • **C:\bea\alui** (Windows) • **/opt/bea/alui** (UNIX and Linux)
Application Port	Select **http** or **https** protocol. The default port is **11944**. This is the port that the portal uses to query Analytics for the portlet UI.

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

Note: After the installer has copied all files to the installation directory, click **Done**. The Analytics Configurator will launch; however, do not complete the configuration at this time. First, configure the Analytics Database, described in "Configuring the Analytics Database" on page 4-3. Note that the Analytics Configurator does not launch on UNIX and Linux systems if a default browser is not specified.

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

Caution: We recommend that you sync the clocks on the servers that run Analytics and the portal before proceeding with configuration. If the clocks are not aligned, some events and sync jobs behave incorrectly.

Configuring the Analytics Database

This section describes how to set up the Analytics database. It contains the following sections:

- Creating and Setting Up a Microsoft SQL Server Database
- Creating and Setting Up an Oracle Database

Creating and Setting Up a Microsoft SQL Server Database

To set up the Analytics database on Microsoft SQL Server:

1. Copy the scripts from **<PT_HOME>\ptanalytics\2.0\sql\mssql** to the database host computer.
2. Create the Analytics database user:
   a. To open the Enterprise Manager: click **Start** | **Programs** | **Microsoft SQL Server** | **Enterprise Manager**.
   b. In the navigation pane, expand the objects to display subfolders of the **Security** folder.
   c. Right-click the **Logins** icon; then click **New Login**.
   d. In the **SQL Server Login Properties** dialog box, enter the user name you provisioned when you completed the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.
   e. In the Authentication area, choose **SQL Server Authentication** and enter the corresponding password.

f. Confirm the password to complete the process.

3. Create the Analytics database with the following properties:
   - Create a database with the name you provisioned when you completed the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.
   - Configure the size of the database. The growth of the database is directly correlated to the number of *events* present in the system. Events include such things as page views, portlet views, user logins, and discussion posts. Estimate 100 MB of growth per 1 million events. For example, if your portal receives roughly 1 million events per day, you should anticipate growth of 36.5 GB per year.
4. Assign database rights for the Analytics database user:
   a. To open the Enterprise Manager: click **Start** | **Programs** | **Microsoft SQL Server** | **Enterprise Manager**.
   b. In the navigation pane, expand the objects to select the **Security** folder.
   c. In the objects pane, right-click the Analytics user and select **Properties**.
   d. On the **General** tab, in the Defaults section, select the Analytics database.
   e. Click the **Database Access** tab.
   f. In the **Specify which databases can be accessed by this login** box, check the Analytics database.
   g. In the **Database roles for *database_name*** box, check **public** and **db_owner**
   h. Click **OK**.
   i. In the navigation pane, expand the objects to display the Analytics database; right-click the Analytics database and select **Properties**.
   j. Click the **Permissions** tab and grant all permissions to the Analytics database user.
   k. Click **OK**.
5. Start the SQL Server Query Analyzer and use SQL Server Authentication to connect to the Analytics database as the Analytics database user.
6. Run the setup scripts for the database, located in the <PT_HOME>\ptanalytics\2.0\sql\mssql\ folder, in the following order (make sure that you are running the scripts on the Analytics database):

a. db_creation.sql

b. install_seeddata.sql

To run a script, display the Open Query File dialog box, choose **File** | **Open**. Then browse and select the database script file. Then click **Query** | **Execute**.

7. In SQL Service Query Analyzer, connect to the portal database as the portal database user.
8. Run the portal_security_service_install.sql setup script on the portal database, located in <PT_HOME>\ptanalytics\2.0\sql\mssql\
9. Close SQL Server Query Analyzer.

Next, configure the Analytics application, as described in "Configuring Analytics" on page 4-6.

Creating and Setting Up an Oracle Database

To create and set up the Analytics Oracle database:

1. Copy the **oracle** directory from **<PT_HOME>\ptanalytics\2.0\sql** to the Analytics database's host computer. This folder contains the scripts that you will use to set up and configure the Analytics Oracle Database.
2. Log on to the host computer for the Analytics database as owner of the Oracle system files.
3. Execute the following steps as the **system** user in your Oracle database.

a. Determine the name of the SID that you will be using for this installation. If you changed the SID from the default when you installed the portal, you need to update **create_analytics_tablespaces.sql** to reflect the SID that you used, substituting all occurrences of the default SID name with your SID name. For Plumtree Corporate Portal 5.x, the default SID name is **PLUM**. For Plumtree Foundation 6.x, the default SID name is **PLUM10**.

If you are creating a new SID, configure AL32UTF8 as the database character set and AL16UTF16 as the national character set.

b. Run the script **create_analytics_tablespaces.sql** for your platform. This file is located in a platform specific subdirectory within the **oracle** directory that you copied in Step 1.

c. Run the script **create_analytics_user.sql**.

Note: If you do not want the script to use the defaults when creating the Oracle database user and password, edit the script. The default user is **analyticsdbuser**; the default

password is **plumtree**. The create_analytics_user.sql script is located in the **oracle** directory that you copied in Step 1.

d. Add the Oracle database user and password values into the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document (you will enter these values into the Analytics Configurator during the procedure described in "Configuring Analytics").

e. Run the script **create_analytics_user.sql**.

4. Execute the following steps as the **analytics** user that you just created.

   a. Run the script **create_analytics_schema.sql**. This script creates all of the tables and indexes that are necessary to run Analytics. The create_analytics_schema.sql script is located in the **oracle** directory that you copied in Step 1.

   b. Run the script **install_analytics_seeddata.sql**. This script adds all of the initial seed data that are necessary to run the Analytics product. The install_analytics_seeddata.sq**l** script is located in the **oracle** directory that you copied in Step 1.

5. As the ALI user that you created when you installed AquaLogic Interaction, run the script **portal_security_service_install.sql** on the portal schema. This script creates the tables and seed data that are necessary for Analytics to use the security service. The install_analytics_seeddata.sql script is located in the **oracle** directory that you copied in Step 1.

6. Run your database's analysis tool on the portal database to the efficiency of the database.

Configuring Analytics

This section describes how to configure Analytics.

Note: Different sets of component-specific configuration pages appear, depending on the components that you just installed.

To configure Analytics:

1. Return to the browser window that launched when you completed the installer. If you have closed the browser window, you can launch the Analytics Configurator on Windows by choosing **Start | Programs | BEA | Analytics Configurator**. On UNIX or Linux, open the following location in a web browser: http://localhost:11944/configurator/ui/start.jsf.

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

2. Click **Continue** to begin the sequence of configuration pages. Complete the following configuration pages using the values you decided on when you completed the Analytics Configurator Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.

Table 4-2 Analytics Configurator Pages

Configuration Page	Settings	Comments
Configure Analytics Database Information	Analytics DB	
	Analytics DB Server Name	Does not appear if you select **Use JDBC URL**
	Analytics DB Port	Does not appear if you select **Use JDBC URL**
	Analytics DB Name	Does not appear if you select **Use JDBC URL**
	Analytics DB JDBC URL	Appears if you select **Use JDBC URL**
	Analytics DB Username	
	Analytics DB Password	
	Use JDBC URL	We recommend that you only use a JDBC URL if the standard method of configuration does not work for your environment, for example if you use Oracle RAC or a SQL Server cluster.

Table 4-2 Analytics Configurator Pages

Configuration Page	Settings	Comments
API Service Information	API Service URL	You can find the API Service URL in your portal by performing one of the following: • In Plumtree Corporate Portal 5.0, you can find the API Service URL in Portal Administration by selecting Portal Server Settings from the Select Utility drop-down list. Then click Portal URL Manager. The API Service URL is displayed in the SOAP Server URL field. • In Plumtree Foundation 6.0, you can find the API Service URL in Portal Administration by selecting Portal Settings from the Select Utility drop-down list. Then click Portal URL Manager. The API Service URL is displayed in the SOAP Server URL field.
	Portal Username	This user must be for a portal account that has Select rights to all communities, portlets, users, documents, and Collaboration projects. It is recommended that you enter a user that belongs to the Administrators group.
	Portal Password	

Table 4-2 Analytics Configurator Pages

Configuration Page	Settings	Comments
Configure Portal Database Information	Portal DB	
	Portal DB Server Name	Does not appear if you select **Use JDBC URL**
	Portal DB Port	Does not appear if you select **Use JDBC URL**
	Portal DB Name	Does not appear if you select **Use JDBC URL**
	Portal DB JDBC URL	Appears if you select **Use JDBC URL**
	Portal DB Username	The Portal DB Username must be the same as the one you used to create the portal database.
	Portal DB Password	
	Portal Version 5.0.4J	
	Use JDBC URL	We recommend that you only use a JDBC URL if the standard method of configuration does not work for your environment, for example if you use Oracle RAC or a SQL Server cluster.

Table 4-2 Analytics Configurator Pages

Configuration Page	Settings	Comments
Configure Collaboration Database Information (**OPTIONAL)**	BEA AquaLogic Interaction Collaboration is installed in my portal environment.	Select this option if Collaboration is installed in your portal environment.
	Collab DB	
	Collab DB Server Name	Does not appear if you select **Use JDBC URL**
	Collab DB Port	Does not appear if you select **Use JDBC URL**
	Collab DB Name	Does not appear if you select **Use JDBC URL**
	Collab DB JDBC URL	Appears if you select **Use JDBC URL**
	Collab DB Username	
	Collab DB Password	
	Use JDBC URL	We recommend that you only use a JDBC URL if the standard method of configuration does not work for your environment, for example if you use Oracle RAC or a SQL Server cluster.

Table 4-2 Analytics Configurator Pages

Configuration Page	Settings	Comments
Configure Publisher Database Information **(OPTIONAL)**	BEA AquaLogic Interaction Publisher is installed in my portal environment.	Select this option if Collaboration is installed in your portal environment.
	Publisher DB	
	Publisher DB Server Name	Does not appear if you select **Use JDBC URL**
	Publisher DB Port	Does not appear if you select **Use JDBC URL**
	Publisher DB Name	Does not appear if you select **Use JDBC URL**
	Publisher DB JDBC URL	Appears if you select **Use JDBC URL**
	Publisher DB Username	
	Publisher DB Password	
	Use JDBC URL	We recommend that you only use a JDBC URL if the standard method of configuration does not work for your environment, for example if you use Oracle RAC or a SQL Server cluster.

3. An installer screen appears that summarizes your configuration. Review this screen and make changes, if necessary.
4. On the final page, click **Update**.

Note: The Analytics Configurator verifies connectivity according to the configuration information you have entered and logs success or errors to the browser window. If you encounter errors, follow the instructions in the error message or see "Troubleshooting" on page A-1

Installing the Interaction Component

This section describes how to install the Interaction and Automation Service components.

The installation instructions are the same for Windows, UNIX, and Linux hosts, with slight exceptions as noted.

Note: The Interaction component is also known as the Plumtree Analytics Portal Component, or Analytics plug-in.

Note: You must reinstall the Interaction component after each time you upgrade AquaLogic Interaction.

To install the Interaction component:

1. Log in to the portal host computer as the same user that installed AquaLogic Interaction.
2. If you are running on Java, shut down the application server.
3. Copy the installer to the disk location from which you plan to launch it. The installer file is one of the following:
   - Windows: **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0)
   - UNIX: **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0)
4. Close all unnecessary applications and windows.
5. Perform one of the following:
   - If you are installing on Windows, double-click the installer file.
   - If you are installing on UNIX, run the installer file.
6. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the Interaction Component Installation Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.

Table 4-3 Installation Wizard Pages - Interaction Component

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Choose **Interaction component**.

Table 4-3 Installation Wizard Pages - Interaction Component

Wizard Page	Description
Portal Installation Directory	Browse and select the location of the portal server installation, for example: **C:\Program Files\Plumtree\ptportal\6.0**. **Note:** The Interaction and Automation Service components require installation into the same directory. For this reason, you use the same wizard page for both installations.
Analytics Services - Fully Qualified Domain Name	Specify the fully qualified domain name for the machine hosting Analytics Services (**not** the host computer(s) on which you installed AquaLogic Interaction).

7. On the final Wizard page, click **Install** to begin the installation.
8. Perform one of the following:
   - If you are running on Java, restart the application server. Then redeploy your portal.war or portal.ear file to your portal application server.
   - If you are running on IIS, restart the application server. For instructions, see your application server's documentation.

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

Installing the Image Service Component

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

1. Log in to the Image Service host computer as the local administrator or the ALI user created during installation of AquaLogic Interaction.
2. Copy the installer to the disk location from which you plan to launch it. The installer file is one of the following:
   - Windows: **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0)
   - UNIX: **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0)

3. Close all unnecessary applications and windows.
4. Double-click the installer file.
5. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the Image Service Component Installation Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.

Table 4-4 Installation Wizard Pages - Image Service Component

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Choose **Image Service component**.
Installation Directory	Browse and select the location where the Image Service files are installed, for example: **C:\Program Files\Plumtree\ptimages**.

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

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

Installing the Automation Service Component

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

To install the Automation Service component:

1. Log in to the Automation Service host computer as the local administrator or the ALI user created during the installation of AquaLogic Interaction.
2. Copy the installer to the disk location from which you plan to launch it. The installer file is one of the following:
   - Windows: **ptanalytics_G5.exe** (Corporate Portal 5.0) or **ptanalytics_G6.exe** (Foundation 6.0)
   - UNIX: **ptanalytics_G5** (Corporate Portal 5.0) or **ptanalytics_G6** (Foundation 6.0)
3. Close all unnecessary applications and windows.

4. Double-click the installer file.
5. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the Automation Service Component Installation Worksheet, which is included in the Analytics Installation and Configuration Worksheets document.

Table 4-5 Installation Wizard Pages - Automation Service Component

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose Components	Choose **Automation Service component**.
Portal Installation Directory	Browse and select the location of the portal server installation, for example: **C:\Program Files\Plumtree\ptportal\6.0**. **Note:** The Automation Service and Interaction components require installation into the same directory. For this reason, you use the same wizard page for both installations.

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

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

7. When installation is complete, the **Analytics Configurator** launches for the machine on which you installed the Automation Service. Complete the configuration page that appears, as described in "Configuring Analytics" on page 4-6.

Starting Analytics and Portal Services

This section provides information on starting Analytics and portal services. Perform the procedure that is appropriate to your operating system.

Starting Analytics and Portal Services on Windows

After you have installed Analytics services and all Analytics components:

- Ensure the BEA AquaLogic Interaction Analytics service has been started. From the Windows Control Panel, click **Administrative Tools | Services**; if the Analytics service has not started, right-click it and choose **Start**.
- Ensure the BEA AquaLogic Interaction Analytics Collector service has been started. From the Windows Control Panel, click **Administrative Tools | Services**; if the Analytics Collector service has not started, right-click it and choose **Start**.

Starting Analytics and Portal Services on UNIX and Linux

After you have installed Analytics services and all Analytics components:

- Ensure the BEA AquaLogic Interaction Analytics service has been started: <PT_HOME>/ptanalytics/2.0/bin/analyticsd.sh start
- Ensure the BEA AquaLogic Interaction Analytics Collector service has been started: <PT_HOME>/ptanalytics/2.0/bin/collectord.sh start

Registering Analytics with the Portal

This section describes how to register the Analytics Console, remote server, web service, and portlet objects with a 6.x portal.

For details on importing the migration package on a 5.x portal, see *Administrator Guide for Plumtree Corporate Portal.* The filename of the 5.x migration package is **analytics5.pte**.

To register the Analytics objects with the portal:

1. Log into the Administrator Portal.
2. Click **Administration**.
3. From the **Select Utility** drop-down choose **Migration - Import**.
4. Browse to select the location of the migration package. If you accepted installation defaults, the location on the Analytics host is: <PT_HOME>\ptanalytics\2.0\serverpackages\analytics6.pte
5. Click **Load Package**.
6. Perform one of the following:
   - If you are importing the migration package for the first time, keep the default selections under Import Settings. The default selections are **Import ACLs** and **Remember Dependency Settings**.

   – If you have previously imported the migration package and you are importing it again, keep the default selections and check the box next to **Overwrite Remote Servers**.

7. Click **Portal Resources** on the left hand side of the Migration editor.
8. Select the objects that you want to import.
9. Click **Finish.**

Adding Analytics Jobs to the Automation Service

This section describes how to add all Analytics jobs to the Automation Service. Once these jobs are added, the Automation Service runs them automatically. To add Analytics jobs to the Automation Service:

1. Log into the Administrator Portal.
2. Click **Administration**.
3. From the **Select Utility** drop-down, choose **Automation Service.**

   The Automation Service Manager appears.
4. Ensure that the Automation Service is online.
5. Under **Edit Automation Services**, click the name of the computer on which Analytics Jobs are installed.

   The Register Folders window appears.
6. Click **Add Folder**.

   The Add Job Folder window appears.
7. Expand the **Analytics** folder.
8. Select the **Analytics Jobs** folder.
9. Click **OK** to close the Register Folders window.
10. Click **Finish**.

    The Automation Service runs the Analytics jobs. If other Automation Service jobs were in queue or running when you added the Analytics jobs to the Automation Service, the Automation Service runs the Analytics jobs after these other jobs have completed.

11. At an appropriate time, ensure that the Analytics jobs have completed successfully. If any Analytics jobs failed, schedule these jobs to run again.

Upgrade

This chapter includes information on how to upgrade Analytics. It includes the following sections:

- Upgrade Paths
- Upgrading Analytics from Version 1.2 to Analytics 2.0
- Upgrading Analytics from Version 1.1 to 2.0

Upgrade Paths

The following table summarizes the supported database upgrade paths for Analytics.

Table 5-1 Upgrade Paths

Upgrade Path	Upgrade References
1.2 to 2.0	Follow the procedures in this chapter.
1.1 to 2.0	Follow the procedures in this chapter.

This section discusses:

- Upgrading Analytics from Version 1.2 to Analytics 2.0
- Upgrading Analytics from Version 1.1 to 2.0

Upgrading Analytics from Version 1.2 to Analytics 2.0

This section describes how to upgrade from Analytics 1.2 to Analytics 2.0.

To upgrade from Analytics 1.2 to Analytics 2.0:

1. Ensure that the Plumtree Analytics service is not running.
   - Windows: From the Windows Control Panel, click Administrative Tools | Services; if the Analytics service is running, right-click it and choose Stop.
   - UNIX: Use the command <PT_HOME>/ptanalytics/1.2/bin/analyticsd.sh stop
2. Ensure that the Plumtree Analytics Collector service is not running.
   - Windows: From the Windows Control Panel, click Administrative Tools | Services; if the Analytics Collector service is running, right-click it and choose Stop.
   - UNIX: Use the command <PT_HOME>/ptanalytics/1.2/bin/collectord.sh stop
3. Delete the **Analytics** folder beneath the PT_HOME\common\container\tomcat\5.0.28\work directory.
4. Install Analytics Services. For details, see "Installing Analytics Services" on page 4-2. If you are choosing the same location as the existing software, accept the default installation directory location when prompted.

   Note: The script file **sync.bat** is deleted. The **AnalyticsRunJobs.bat** file is added, and is scheduled to run automatically as an Automation Service job.
5. Upgrade the Analytics database by running the **upgrade_1.x_to_2.0.sql** script:

   <PT_HOME>\ptanalytics\2.0\sql\<database>\upgrade_1.x_to_2.0.sql
6. Run the portal_security_service_install.sql setup script on the portal database. The script is located in <PT_HOME>\ptanalytics\2.0\sql\mssql\ .
7. Reconfigure Analytics by running the Analytics Configurator. For details, see "Configuring Analytics" on page 4-6
8. Partition the Analytics database tables by running the following script:
   - AnalyticsPartition.bat (Windows)
     <PT_HOME>\ptanalytics\2.0\bin\AnalyticsPartition.bat
   - AnalyticsPartition.sh (UNIX)
     <PT_HOME>/ptanalytics/2.0/bin/AnalyticsPartition.sh

The partition.log file displays partitioning progress in real-time. This log is located in:

- C:\bea\alui\ptanalytics\2.0\logs (Windows)
- /opt/bea/alui/ptanalytics/2.0/logs (UNIX/Linux)

The following table describes the approximate lengths of time that it should take to partition the Analytics database:

Table 5-2 Analytics Database Partitioning Estimates - Analytics 1.2 to 2.0

Total Number of Facts	Time to Partition
10 million	12.5 minutes
20 million	25 minutes
50 million	62.5 minutes
100 million	2 hours 5 minutes
500 million	10 hours 50 minutes

9. **(Oracle only)** Run your database's analyisis tool on both the Analytics and portal databases to increase the efficiency of the databases.
10. Install the Interaction component. For details, see "Installing the Interaction Component" on page 4-12
11. Install the Image Service component. For details, "Installing the Image Service Component" on page 4-13
12. Stop and restart the Analytics services. For details, see "Starting Analytics and Portal Services" on page 4-15.
13. Register the Analytics application, remote server, Web services, and portlets with the portal by importing the migration package. For details on performing this task on a 6.x portal, see "Registering Analytics with the Portal" on page 4-16. For details on importing the migration package on a 5.x portal, see *Administrator Guide for Plumtree Corporate Portal*.
14. Install the Automation Service component. For details, see "Installing the Automation Service Component" on page 4-14
15. Add Analytics jobs to the Automation Service. For details, see "Adding Analytics Jobs to the Automation Service" on page 4-17.

Upgrading Analytics from Version 1.1 to 2.0

This section describes how to upgrade from Analytics 1.1 to Analytics 2.0.

To upgrade from Analytics 1.1 to Analytics 2.0:

1. Ensure that the Plumtree Analytics service is not running.
   - Windows: From the Windows Control Panel, click Administrative Tools | Services; if the Analytics service is running, right-click it and choose Stop.
   - UNIX: Use the command <PT_HOME>/ptanalytics/1.1/bin/analyticsd.sh stop
2. Ensure that the Plumtree Analytics Collector service is not running.
   - Windows: From the Windows Control Panel, click Administrative Tools | Services; if the Analytics Collector service is running, right-click it and choose Stop.
   - UNIX: Use the command <PT_HOME>/ptanalytics/1.1/bin/collectord.sh stop
3. Delete the **Analytics** folder beneath the PT_HOME\common\container\tomcat\5.0.28\work directory.
4. Install Analytics Services. For details, see "Installing Analytics Services" on page 4-2. If you are choosing the same location as the existing software, accept the default installation directory location when prompted.

   Note: The script file **sync.bat** is deleted. The **AnalyticsRunJobs.bat** file is added, and is scheduled to run automatically as an Automation Service job.
5. Upgrade the Analytics database by running the **upgrade_1.x_to_2.0.sql** script: <PT_HOME>\ptanalytics\2.0\sql\<database>\upgrade_1.x_to_2.0.sql
6. Run the portal_security_service_install.sql setup script on the portal database. The script is located in <PT_HOME>\ptanalytics\2.0\sql\mssql\
7. Reconfigure Analytics by running the Analytics Configurator. For details, see "Configuring Analytics" on page 4-6

   Note: When running the Analytics Configurator during the 1.1 to 2.0 upgrade, you must re-enter the API Service URL and the passwords for all databases.
8. Partition the Analytics database tables by running the following script:
   - AnalyticsPartition.bat (Windows): <PT_HOME>\ptanalytics\2.0\bin\AnalyticsPartition.bat

– AnalyticsPartition.sh (UNIX):
<PT_HOME>/ptanalytics/2.0/bin/AnalyticsPartition.sh

The collector.log file displays partitioning progress in real-time. This log is located in: <PT_HOME>\ptanalytics\2.0\logs\collector.log

The following table describes the approximate lengths of time that it should take to partition the Analytics database:

Table 5-3 Analytics Database Partitioning Estimates - Analytics 1.1 to 2.0

Total Number of Facts	Time to Partition
10 million	12.5 minutes
20 million	25 minutes
50 million	62.5 minutes
100 million	2 hours 5 minutes
500 million	10 hours 50 minutes

9. **(Oracle only)** Run your database's analyisis tool on both the Analytics and portal databases to increase the efficiency of the databases.

10. Install the Interaction component. For details, see "Installing the Interaction Component" on page 4-12

    Note: Upon upgrading to Analytics 2.0 the port used to send event metrics from the portal server(s) to the Analytics Services server is modified to 31314. Ensure that this port is open between the portal server(s) and the Analytics Services server. For a list of other ports used by Analytics, see "Ports Required by Analytics" on page 2-3.

11. Install the Image Service component. For details, "Installing the Image Service Component" on page 4-13

12. Stop and restart the Analytics services. For details, see "Starting Analytics and Portal Services" on page 4-15.

13. Register the Analytics application, remote server, Web services, and portlets with the portal by importing the migration package. For details on performing this task on a 6.x portal, see "Registering Analytics with the Portal" on page 4-16. For details on importing the migration package on a 5.x portal, see *Administrator Guide for Plumtree Corporate Portal*.

14. Install the Automation Service component. For details, see "Installing the Automation Service Component" on page 4-14
15. Add Analytics jobs to the Automation Service. For details, see "Adding Analytics Jobs to the Automation Service" on page 4-17.

APPENDIX A

Troubleshooting

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

- Overview of Installation and Configuration Logs
- Troubleshooting Common Installation and Configuration Problems

Note: For details on troubleshooting Analytics during runtime, see *Administrator Guide for BEA AquaLogic Interaction Analytics*.

Overview of Installation and Configuration Logs

The following table provides the descriptions and locations of logs that you can use to troubleshoot the installation and configuration of Analytics. Individual log files are generated for each day's activity.

Table A-1 Logs Used to Troubleshoot the Installation and Configuration of Analytics

Log	Description	Location and Platform
AquaLogic_Interaction_ Analytics_<version>_ InstallLog.log	Provides activity and error details for the installation of Analytics.	• C:\bea\alui (Windows) • /opt/bea/alui (UNIX/Linux)
ptanalytics_deploy.log	Provides additional activity and error details for the installation of Analytics.	• C:\bea\alui (Windows) • /opt/bea/alui (UNIX/Linux)

Table A-1 Logs Used to Troubleshoot the Installation and Configuration of Analytics

Log	Description	Location and Platform
configurator.log	Provides activity and error details for the Analytics Configurator.	• C:\bea\alui\ptanalytics\2.0\logs (Windows) • /opt/bea/userinteraction/ptanalytics/2.0/logs (UNIX/Linux)
partition.log	Provides activity and error details for initial partitioning of the Analytics database during upgrade. You create initial partitions by running the AnalyticsPartition.bat (Windows) or AnalyticsPartition.sh (UNIX) script. **Note:** The collector.log file provides activity and error details for routine partitioning activity that occurs during Analytics runtime. For details, see *Administrator Guide for BEA AquaLogic Interaction Analytics*.	• C:\bea\alui\ptanalytics\2.0\logs (Windows) • /opt/bea/userinteraction/ptanalytics/2.0/logs (UNIX/Linux)

Troubleshooting Common Installation and Configuration Problems

The following table describes common installation and configuration problems and provides solutions to them.

Table A-2 Common Installation and Configuration Problems and Solutions

Problem Description and Details	Cause and Solution
• **Problem:** Configurator errors when testing configuration connectivity. • **Details:** When you complete the Analytics Configurator, connectivity is tested and errors are generated.	• **Cause:** Incorrect information provided to the Configurator. • **Solution:** Double check the information provided to the Configurator for accuracy, spelling and letter case. Re-run the Configurator.

Uninstalling Analytics

This appendix discusses how to uninstall Analytics.

Uninstalling Analytics on Windows

To uninstall Analytics on Windows:

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

Uninstalling Analytics on UNIX/Linux

To uninstall Analytics on UNIX and Linux platforms, perform one of the following:

- If you upgraded to Analytics 2.0, launch the uninstaller for Analytics 2.0 by running: /opt/plumtree/uninstall/ptanalytics/2.0/Uninstall_Plumtree_Analytics
- If you performed an installation of Analytics 2.0 (and you did not upgrade to Analytics 2.0): /opt/bea/userinteraction/uninstall/ptanalytics/2.0/Uninstall_Plumtree_Analytics

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