



QUICKSTART UPGRADE GUIDE FOR

PLUMTREE PUBLISHER 6.2

Plumtree Publisher 6.2
December 2005 Update

The information contained in this publication is subject to change without notice. Plumtree Software, Inc. makes no warranty of any kind with regard to this manual, including, but not limited to, the implied warranties of merchantability and fitness for a particular purposes. Plumtree Software, Inc. shall not be liable for errors contained herein or for incidental or consequential damages in connection with the furnishing, performance, or use of this manual.

Copyright © 2005 Plumtree Software, Inc. All rights reserved. Plumtree, the Plumtree Logo, Plumtree Publisher, and all other Plumtree product names and slogans are trademarks or registered trademarks of Plumtree Software, Inc. or its affiliates in the U.S. and other countries. Other product names and slogans may be trademarks or registered trademarks of their respective owners.

UNPUBLISHED – RIGHTS RESERVED UNDER THE COPYRIGHT LAWS OF THE UNITED STATES. USE OF A COPYRIGHT NOTICE IS PRECAUTIONARY ONLY AND DOES NOT IMPLY PUBLICATION OR DISCLOSURE.

THIS SOFTWARE CONTAINS CONFIDENTIAL INFORMATION AND TRADE SECRETS OF PLUMTREE SOFTWARE. USE DISCLOSURE OR REPRODUCTION IS PROHIBITED WITHOUT THE PRIOR EXPRESS WRITTEN PERMISSION OF PLUMTREE SOFTWARE.

The Licensed Software and Documentation are deemed to be “commercial computer software” and “commercial computer software documentation” as defined in FAR Sections 12.212 and DFARS Section 227.7202.

Full licensing information is available in the attributions file available in the product release package.

If you have comments on this document, send email to: documentation@plumtree.com.

Table of Contents

1.	INTRODUCTION	1
2.	PLANNING YOUR UPGRADE	2
	PORTAL REQUIREMENTS.....	2
	UPGRADING FROM CONTENT SERVER 4.x.....	2
	UPGRADING FROM CONTENT SERVER 5.0.x, 6.0 or 6.1.....	2
	PUBLISH AND PREVIEW TARGETS	2
3.	QUICK START UPGRADE.....	4
	STEP 1: REVIEW REQUIREMENTS.....	Error! Bookmark not defined.
	STEP 2: PREPARING TO UPGRADE	4
	STEP 3: RUN THE PUBLISHER INSTALLER.....	7
	STEP 4: REBOOT YOUR MACHINE	9
	STEP 5: UPGRADE THE WORKFLOW DATABASE.....	10
	STEP 6: IMPORT THE PUBLISHER.PTE MIGRATION PACKAGE	11
	STEP 7: START PUBLISHER	11
	STEP 8: IMPORT THE PUBLISHED_CONTENT_PORTLETS MIGRATION PACKAGE	12
	STEP 9: UPGRADE THE WEB SERVICES UUIDS IN THE PORTAL DATABASE.....	13

I. INTRODUCTION

UPGRADING PUBLISHER ON WINDOWS, UNIX and Linux

This guide provides instructions for a rapid upgrade to Plumtree Publisher 6.2 on Windows, UNIX and Linux. In addition to this guide, Plumtree provides the following manuals:

- *Administrator Guide for Plumtree Publisher 6.2*
- *Plumtree Publisher Templating Language Specification*
- *Installation and Upgrade Guide for Plumtree Publisher 6.2*

2. PLANNING YOUR UPGRADE

PORTAL REQUIREMENTS

Publisher 6.2 requires Plumtree Foundation 6.0.

UPGRADING FROM CONTENT SERVER 4.x

Direct upgrades from Content Server 4.x to 6.2 are not supported; you must first upgrade from 4.x to 5.0.x, and then from 5.0.x to 6.2. Follow the steps in Chapter 4 of the Installation and Upgrade Guide for Content Server v5.0.4, “Upgrading from Content Server 4.1.” It is important to validate that you can bring up portlets in the 5.0.4 state before starting the 6.2 upgrade

UPGRADING FROM CONTENT SERVER 5.0.x, 6.0 or 6.1

You can upgrade directly from Publisher 5.0.x , 6.0 or 6.1 to Publisher 6.2 by following the instructions in this QuickStart Guide.

PUBLISH AND PREVIEW TARGETS

Although you will enter information about the default published content location and URL in one of the panels in STEP 2: RUN THE PUBLISHER INSTALLER, Publisher 6.2 does not change your publish and preview targets upon upgrade. If you want to change your publish targets, including changing the port number, you can do this with Publisher Explorer after you complete the upgrade. Changing the publish targets also requires republishing your existing content.

ADDITIONAL INFORMATION FOR UPGRADES OF CONTENT SERVER 6.0 AND EARLIER

Publisher 6.2 contains a significant change in the deployment configuration for the product. Instead of installing the product, installing a separate Application Server, and deploying a WAR file to the application server, Publisher 6.2 is self-contained. It includes the runtime components needed for HTTP/HTTPS processing, and it no longer requires a separate application server. This change makes the product easier to install and maintain, but you should be aware of the following:

- **Plumtree Publisher / Workflow Service** – After you install or upgrade to 6.2, there exists a single service (or “daemon” on UNIX and Linux) for both the Publisher and Workflow applications. The service is controlled from the

Service Control Manager on Windows, or from the command line on UNIX and Linux. In previous versions, Content was deployed to a separate application server, and Workflow was a standalone service.

- **Single port number** – The 6.2 Publisher / Workflow Service runs on a single port number. In previous versions, the Publisher Web application ran on one port number, and the Workflow Service ran on a different port number. We recommend the use of port 7087 for the 6.2 Publisher/Workflow Service. Version 6.2 adds a “container.conf” file containing port number settings if they need to be changed after installation.

3. QUICKSTART UPGRADE

This section describes how to upgrade all the necessary Plumtree Publisher components on a Windows or UNIX or Linux machine. These components include:

- Publisher and Workflow Databases
- Publisher
- Workflow Service
- Image Service files

The steps below describe an upgrade in which all files are deployed on a single Windows or UNIX or Linux machine. Publisher and Workflow are automatically installed on the same machine, and the installer does not allow you to install only one or the other. You can modify the steps below for the case in which Publisher / Workflow and the Image Service are deployed on separate machines.

STEP 1: PREPARING TO UPGRADE

This guide makes the following assumptions:

- All components will run on the same computer. If your Image Service is separate from your Publisher then you should run the installer on the Image Service to install the Image Service files.
- The fully qualified domain name will be used in the host name and URLs below.

In the course of installing the Plumtree Foundation 6.0, you will have determined configuration information about your database deployment (Oracle or MS SQL Server) and Portal components such as the location of the Image Service, Search Service, and Document Repository Service. Answer the following configuration questions **based on the Plumtree Foundation 6.0 installation that you have already completed**:

Table 1: Configuration Information from your 6.0 Install

Questions	Answer
For Oracle	
What host is your Oracle server on?	E.g.: dbhost.mycompany.com
What port is your Oracle server on?	E.g.: 1521
What is the ORACLE_HOME on your database machine?	E.g.: /opt/plumtree
What is your ORACLE_SID?	E.g.: PLUM
What is the schema username and password for the Portal database?	E.g.: plumbuser / plumtree
For SQL Server	
What host is your SQL Server db on?	E.g.: dbhost.mycompany.com

QUICKSTART UPGRADE - STEP 1: PREPARING TO UPGRADE

What port is your SQL Server db on?	E.g. 1433
What is the database name for the Portal database?	E.g. plumdb
What is the database username and password for the Portal database?	E.g. plumdbuser / plumbtree
What is the Imageserver URL?	E.g.: http://dev01.mycorp.com/imageserver (Windows) /opt/plumtree/ptimages (Linux)
What host and port do the Search Service run on?	E.g.: searchhost.mycompany.com, port 15244
What host and port do the Document Repository Service run on?	E.g.: doc-repository.mycompany.com, port 8020

QUICKSTART UPGRADE - STEP 1: PREPARING TO UPGRADE

Next you must determine database configuration information for Publisher and Workflow Service, each of which require their own database.

Table 2: Configuration Questions to answer for Publisher

Questions	Answer (Oracle)	Answer (SQL Server)
What name will you use for the Publisher database?	E.g.: ptcldb	E.g. ptcldb
What name will you use for the Workflow Service database?	E.g.: workflowdb	E.g workflowdb
What port number will the Content / Workflow Service reside on?	E.g.: 7087	E.g. 7087

STEP 2: RUN THE PUBLISHER INSTALLER

1. Log in as local administrator on the machine on which you will be doing the install. It is assumed that this machine has the application server hosting the pre-existing version of Publisher.
2. Stop the Application Server.
Note: If you want to continue running Publisher on the same port your old application server was on, you must make sure to change the port used by the old application server so that no conflict of ports exists.
3. Undeploy the Publisher ptcs Web application from the application server. Instead of deleting the ptcs.xml file, you should rename it because you might want to revert to the ptcs.xml file from the previous installation at some point. To do this in Tomcat, rename the **ptcs.xml** file in the **<tomcat home>/webapps** folder. For Weblogic or Websphere, rename the Web application called **ptcs** in the application server's administrative console.
4. If your published content is deployed on the same application server as Content Server and you want to deploy it to the new Publisher / Workflow application server, you should undeploy it. To do this in Tomcat, delete the publishedcontent.xml file in the **<tomcat home>/webapps** folder. For Weblogic or Websphere, delete the Web application called published content in the application server administrative console.
5. Stop the Workflow service.
6. Back up your existing Portal Server, Content Server, and Workflow databases. Restore only if you abort the installation.
7. Run the installer from the distribution appropriate for the OS you are using.
Windows: \$ <install_root>\PlumtreePublisher_v6-2.exe
UNIX and Linux: \$ <install_root>/PlumtreePublisher_v6-2
Note: The following numbered items correspond directly to panels in the installer. Where relevant, the instructions below list example entries that are consistent with the example configuration data from STEP 2: PREPARING TO INSTALL. Unless otherwise noted, at the end of each numbered items, click **Next**.
8. On the Introduction panel, click **Next**.
9. On the License Agreement panel, accept the agreement.
10. The Choose Components panel prompts you to choose Publisher or Image Service files. You can deploy the Publisher and Image Service files separately in a custom installation.
11. Choose full configuration.
Note: The "published content configuration" is a new advanced option specifically designed to add redundancy to published content. It should only be considered *after* you have completed a successful upgrade or installation of the full configuration. You can find additional details about the published content configuration in the *Installation and Upgrade Guide for Plumtree Publisher 6.2*.
12. On the Installation Folder panel, enter the Install Home from your current Publisher installation.
Example:
Windows: C:\Program Files\Plumtree
UNIX and Linux: /opt/plumtree/Plumtree
Note: The default is not automatically the correct location of the installation home, so you should change this to reflect the accurate location.

13. The Application Host and Port consists of the fully qualified domain name and port number that the Publisher and Workflow Web components will use to handle requests.
Example host: publisher.mycompany.com
Default port: 7087
http or https: http

14. On the Publisher Database panel, specify if the portal uses SQL Server or Oracle.

Note: This is not a panel in UNIX or Linux.

15. On the Publisher Database Connection Information panel, specify the connection information for the database and user that your preexisting Publisher deployment is using.

Example: SQL Server

Content Database Computer	publisherdb.mycompany.com
Content Database Port	1433
Content Database Name	ptcsdb
Content Database Login	plumdbuser
Content Database Password	plumtree

Example: Oracle

Content Database Computer	publisherdb.mycompany.com
Content Database Port	1521
Content Database Service Name	PLUM
Content Database Name	ptcsdb
Content Database Login	plumdbuser
Content Database Password	plumtree

16. On the Workflow Service Database panel, specify if the portal uses SQL Server or Oracle.

Note: This is not a panel in UNIX or Linux.

17. On the Workflow Service Database Connection Information panel, specify the connection information for the database and user that your preexisting Publisher deployment is using.

Example: SQL Server

Workflow Database Computer	publisherwfdb.mycompany.com
Workflow Database Port	1433
Workflow Database Name	workflowdb
Workflow Database Login	plumdbuser
Workflow Database Password	plumtree

Example: Oracle

Workflow Database Computer	publisherwfdb.mycompany.com
Workflow Database Port	1521
Workflow Database Service Name	PLUM
Workflow Database Name	workflowdb
Workflow Database Login	plumdbuser
Workflow Database Password	plumtree

18. On the Portal Server Database panel, specify if the portal uses SQL Server or Oracle.

Note: This is not a panel in UNIX or Linux.

19. On the Portal Database Connection Information panel, specify connection information for the Oracle or SQL Server database from your Portal 5.0.x configuration information.

Example: SQL Server

Portal Database Computer	portaldb.mycompany.com
Portal Database Port	1433
Portal Database Name	plumdb
Portal Database Login	plumdbuser
Portal Database Password	plumtree

Example: Oracle

Portal Database Host	portaldb.mycompany.com
Portal Database Port	1521
Portal Database Name	plumdb
Portal Database Login	plumdbuser
Portal Database Password	plumtree

20. Enter the Image Service information. If you chose not to install the Image Service on this host, you will not see this panel.

Windows: C:\Program files\plumtree\ptimages

UNIX and Linux: /opt/plumtree/ptimages

Note: Plumtree is the default for UNIX and Linux, and ptimages is the location of your Image Service.

21. Choose the URL and folder for published content. Your current installation either uses the default location, **<install home>/ptcs/publishedcontent**, or a custom location for an external Web server. If you choose “Use Defaults”, the Published Content URL and folders will be as follows:

Published Content URL: http://<computer_name>:<port>/publishedcontent

Windows Published Content Folder: C:\Program files\Plumtree\ptcs\publishedcontent

UNIX and Linux Published Content Folder: /opt/plumtree/ptcs/publishedcontent

If you customized the publishing targets for folders in your current installation through Publisher Explorer, all your customizations will be preserved. If you have customized the root folder publishing target you should select the Use Custom Configuration option and enter the locations in the following panel.

22. If you chose the Use Custom Configuration option from the previous panel (Step 20) you will be asked to enter the URL and folder for your published content. Otherwise, this panel is skipped.

23. Enter the fully qualified domain name and port number for the portal Document Repository Service.

Example host: doc-repository.mycompany.com

Default port: 8020

24. Enter the fully qualified domain name and port number for the Search Service.

Example host: searchhost.mycompany.com

Default port: 15244

25. On the SMTP Mail Server Information panel, enter the name of the SMTP Server that will be used for notification emails for Workflow assignments, and the email address of an administrator.

Example: mail.mycorp.com, portaladmin@mycorp.com

26. Specify the authentication ID and password for the Portal Server to use when it connects to the Publisher.

Default Authentication ID: authenticationid

Note: You will need this ID and password to configure Publisher.

27. Choose a default language, and click **Next**.

28. On the Pre-Installation Summary panel, begin installation by clicking **Install**.

29. Re-run the installer on your Image Service host if necessary.

STEP 4: REBOOT YOUR MACHINE

When the installer prompts you, reboot the machine. If you do not reboot, certain PATH environment variable changes might not take effect, and you will get errors when you try to

deploy and / or start the applications.

Note: You do not need to reboot a UNIX or Linux machine.

STEP 5: UPGRADE THE WORKFLOW DATABASE

Locate your current configuration in the table below and follow the appropriate instructions:

Content Server Configuration	Workflow Database Upgrade Instructions
Content Server 5.x, 6.0 or 6.1; no Workflow Database.	<ul style="list-style-type: none"> Create a Workflow database and user with the information you entered in the installer. Refer to the <i>Installation and Upgrade Guide for Plumtree Publisher 6.2</i> for full details on database and user creation for the database you are using. Log into SQL Query Analyzer or SQL*Plus as the Workflow database user. <ul style="list-style-type: none"> For SQL Server: Run the script <code><install_root>\ptworkflow\6.2\sql\mssql\create_schema.sql.</code> For Oracle: Run the script: <code><install_root>\ptworkflow\6.2\sql\oracle9.2\create_schema.sql</code> or <code><install_root>\ptworkflow\6.2\sql\oracle10\create_schema.sql</code> depending on your version of Oracle.
Content Server 5.x; existing Workflow database.	<ul style="list-style-type: none"> Run the create_schema.sql script for your database. Windows: Run the script <code><install_root>\ptworkflow\6.2\bin\dbupgrade.bat</code> UNIX and Linux: Run the script <code><install_root>/ptworkflow/6.2/bin/dbupgrade.sh</code>
Content Server 6.0; existing Workflow database.	<ul style="list-style-type: none"> Oracle: Run the script <code><install_root>\ptworkflow\6.2\sql\oracle9.2\upgrade_schema6.1.sql</code> or <code><install_root>\ptworkflow\6.2\sql\oracle10\upgrade_schema6.1.sql</code> depending on your version of Oracle. Note: There is no upgrade_schema6.1.sql script for SQL Server. Oracle or SQL Server: Run the script <code><install_root>\ptworkflow\6.2\sql\oracle9.2\upgrade_schema6.2.sql</code> or <code><install_root>\ptworkflow\6.2\sql\oracle10\upgrade_schema6.2.sql</code> or <code><install_root>\ptworkflow\6.2\sql\mssql\upgrade_schema6.2.sql</code> depending on your database server.
Content Server 6.1; existing Workflow database	<ul style="list-style-type: none"> Oracle or SQL Server: Run the script <code><install_root>\ptworkflow\6.2\sql\oracle9.2\upgrade_schema6.2.sql</code> or <code><install_root>\ptworkflow\6.2\sql\oracle10\upgrade_schema6.2.sql</code> or <code><install_root>\ptworkflow\6.2\sql\mssql\upgrade_schema6.2.sql</code> depending on your database server.

STEP 6: IMPORT THE PUBLISHER.PTE MIGRATION PACKAGE

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

To migrate the Publisher .pte file:

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

STEP 7: START PUBLISHER

Make sure the Search and Document Repository Service Services are running before you start Publisher.

For Windows:

From the Service Control Manager, Start NT Service, Plumtree Publisher / Workflow Service.
Or, from the command line, run

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

For UNIX and Linux:

From the command line, run

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

In a browser, access the Publisher diagnostics page:

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

For example,

<http://dev01.plumtree.com:7087/ptcs/console/index.jsp>

Use the authentication id and password you created in Step 19 of STEP 2: RUN THE PUBLISHER INSTALLER. You should see no errors if no configuration problems exist and all supporting services (Search, Document Repository Service) are running.

You can also access the Workflow Service diagnostics page:

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

For example,

<http://dev01.plumtree.com:7087/wfconsole>

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

QUICKSTART UPGRADE - STEP 8: IMPORT THE PUBLISHED_CONTENT_PORTLETS MIGRATION PACKAGE

Windows:

From the command line, run

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

UNIX and Linux:

From the command line, run

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

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

To stop the Publisher/Workflow Service:

For Windows: From the Service Control Manager, stop the Plumtree Content/Workflow Service.

Or, from the command line, run

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

For UNIX and Linux:

From the command line, run

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

STEP 8: IMPORT THE PUBLISHED_CONTENT_PORTLETS MIGRATION PACKAGE

Important – Publisher must be running before importing this package.

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

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

To delete the 5.0.x portlet templates:

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

If you are upgrading from 6.0 or 6.1, the default News, Community Directory, Announcement, Header, Footer and Content Canvas portlet templates will be overwritten so you will need to reapply any customizations.

To import the published content portlets migration package:

1. Log into the Administrator Portal.

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

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

STEP 9: UPGRADE THE WEB SERVICES UUIDS IN THE PORTAL DATABASE

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

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

To upgrade your Web services UUIDs, execute the **portal_upgrade_5.0_to_6.0.sql** script that is relevant to your database against the portal database:

For MS SQL Server, log into SQL Query Analyzer as the portal database user and run the SQL script **ptcs\6.2\sql\mssql\portal_upgrade_5.0_to_6.0.sql**.

For Oracle, log into Oracle Enterprise Manager as the portal database user, open SQL*Plus and run the SQL script **ptcs\6.2\sql\oracle9.2\portal_upgrade_5.0_to_6.0.sql** or **ptcs\6.2\sql\oracle10g\portal_upgrade_5.0_to_6.0.sql**, depending on your Oracle database.