



# **BEA AquaLogic™** **Interaction** **Publisher**

## **Installation and Upgrade** **Guide**

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# Welcome

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

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

If you are upgrading an existing Content Server or Publisher deployment to the latest version of Publisher, you can begin with [Chapter 6, “Upgrading Publisher.”](#)

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

# Typographical Conventions

This book uses the following typographical conventions.

**Table 1-1 Typographical Conventions**

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

## BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

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

Resource	Description
Installation Worksheet	<p>This worksheet helps you to gather and record prerequisite information necessary for installing AquaLogic Interaction Publisher.</p> <p>It is available on <a href="http://edocs.bea.com">edocs.bea.com</a> and on the application CD.</p>
Administrator Guide	<p>This book describes how to perform management and maintenance of Publisher.</p> <p>It is available in electronic form (PDF) in the release package and on <a href="http://edocs.bea.com">edocs.bea.com</a>.</p>
Release Notes	<p>These files are written for Publisher administrators. They include information about new features and known issues in the release.</p> <p>They are available in electronic form (HTML) on <a href="http://edocs.bea.com">edocs.bea.com</a>.</p>

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

Resource	Description
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site ( <a href="http://dev2dev.bea.com">dev2dev.bea.com</a> ). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.
Deployment Guide	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 <a href="http://edocs.bea.com">edocs.bea.com</a> .
Online Help	The online help is written for all levels of Publisher users. It describes the user interface for Publisher and gives detailed instructions for completing tasks in Publisher.  To access online help, click the help icon.

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

Resource	Description
AquaLogic User Interaction Support Center	<p>The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities:</p> <p><b>Technical Support Center</b></p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p><b>User Group</b></p> <p>Visit the User Group section to collaborate with peers and view upcoming meetings.</p> <p><b>Product Center</b></p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p><b>Developer Center</b></p> <p>Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.</p> <p><b>Education Services</b></p> <p>Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p>If you do not see the Support Center when you log in to <a href="http://support.plumtree.com">http://support.plumtree.com</a>, contact <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a> for the appropriate access privileges.</p>



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

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
Technical Support	<p>If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.</p> <p>E-mail: <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a></p> <p>Phone Numbers:</p> <p>U.S.A. +1 866.262.PLUM (7586) or +1 415.263.1696</p> <p>Europe +44 1494 559127</p> <p>France +33 1.46.91.86.79</p> <p>Australia/NZ +61 2.9923.4030</p> <p>Asia Pacific +61 2.9931.7822</p> <p>Singapore +1 800.1811.202</p>

Welcome

# Overview of Publisher

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

Publisher includes the following components.

**Table 2-1 Publisher components**

Component	Objects
Publisher	Publisher is a Java application that enables Web publishing.
Publisher Database	This database stores metadata for the content in Publisher
Workflow	Workflow enables content workflow and publishing management. If you are licensed for and install Publisher only to support portal branding, you do not need Workflow, and can disable it. For information on disabling Workflow, see KB article DA_222501, “Enabling and Disabling Workflow Server.”
Document Repository Service	Document Repository Service provides a central storage place for large files. The Document Repository Service is also used by AquaLogic Interaction Collaboration.
Publishing targets	You configure Web servers to store published content.
Search Libraries	Publisher uses AquaLogic Interaction Search to index published content.

**Table 2-1 Publisher components**

Component	Objects
Image Service	The Image Service serves images, javascript, CSS and other static content for use by the AquaLogic User Interaction system.
Publisher web services	<p>Publisher includes the following standard web services:</p> <ul style="list-style-type: none"><li>• Publisher Administration</li><li>• Content Items in Workflow</li><li>• Publisher Content Service</li><li>• Publisher Gateway</li><li>• Publisher KD</li><li>• Content Submission</li><li>• Most Recently Used Content</li><li>• Published Content Web Service</li><li>• Work List</li></ul>

**Caution:** In AquaLogic Interaction portal deployments, Publisher provides all branding functionality. Follow the instructions in this guide to install the Publisher branding functionality that supports your portal deployment. For licensing requirements, contact your BEA sales representative.

Publisher supports the following languages:

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

- Korean
- Portuguese
- Spanish

## Overview of Publisher

# Pre-Installation Steps

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

1. Download the most up-to-date documentation from [edocs.bea.com](https://docs.bea.com).
2. 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.
3. Provision host computers and configure software dependancies for your deployment. For details, see [Hardware and Software Requirements](#)
4. Complete the deployment component configuration worksheet provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.
5. Ensure you have administrative access to deployment components. For details, see [“Administrative User Requirements” on page 3-2](#).
6. Create databases and users to associate with Publisher and Workflow. For details, see [“Creating Databases and Database Users for Publisher” on page 3-3](#).

## Hardware and Software Requirements

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

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

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

**Table 3-1 Hardware and Software Requirements**

Component	Requirement
Publisher Host Computer	<b>Hardware</b> <ul style="list-style-type: none"> <li>Dual 1.8 GHz or higher, with 2MB L2 cache</li> <li>1 GB memory</li> <li>40 GB disk space</li> </ul> <b>Operating System</b> <ul style="list-style-type: none"> <li>Windows 2003 Server SP1</li> <li>AIX 5.3, on POWER3, POWER4, POWER5</li> <li>Solaris 8, 9, and 10 on SPARC</li> </ul>
Database Server Host Computer	<b>Software</b> <ul style="list-style-type: none"> <li>Microsoft SQL Server 2000 SP3a, SQL Server 2005 in 2000 compatibility mode (Windows installations of Publisher only)</li> <li>Oracle 9i in default or Oracle RAC configuration</li> <li>Oracle 10g in default or Oracle RAC configuration</li> </ul>
Browser Requirements	<ul style="list-style-type: none"> <li><b>Administrative Users:</b> Internet Explorer 5.5 or 6.0</li> <li><b>Contributing Users:</b> Internet Explorer 5.5 or 6.0, Firefox 1.5, Netscape 7.2</li> <li><b>Browsing Users:</b> Internet Explorer 5.0 and all of the above</li> </ul>
Portal Compatibility	AquaLogic Interaction 6.1

## Administrative User Requirements

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

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

To create objects in the AquaLogic Interaction portal and Publisher databases, you must be able to log in as the following users:



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

## Creating Databases and Database Users for Publisher

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

- “[Creating Databases and Database Users on SQL Server](#)” on [page 3-3](#)
- “[Creating Tablespaces and Database Users on Oracle](#)” on [page 3-5](#)

## Creating Databases and Database Users on SQL Server

To create the Publisher database user and database:

1. Create the Publisher database with the following properties:
  - Configure the database server so that it is case-insensitive.
  - Create a database with the name you planned when you completed the worksheets provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.
  - Configure the initial size of the database. For a relatively small installation, configure a database that is at least 100 MB. For a large enterprise with as many as 20,000 users, configure a database that is as large as 1 GB.
2. Create the Publisher database user:
  - a. To open the Enterprise Manager: click **Start | Programs | Microsoft SQL Server | Enterprise Manager**.
  - b. In the navigation pane, expand the objects to display subfolders of the **Security** folder.
  - c. Right-click the **Logins** icon; then click **New Login**.
  - d. In the **SQL Server Login Properties** dialog box, enter the user name you designated for the Publisher database user when you completed the worksheets provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.

- e. In the Authentication area, choose **SQL Server Authentication** and enter the corresponding password.
- f. On the **General** tab, in the Defaults section, select the Publisher database.
- g. Click the **Database Access** tab.
- h. In the **Specify which databases can be accessed by this login** box, check the Publisher database.
- i. In the **Database roles for *database\_name*** box, check **public** and **db\_owner**
- j. Click **OK**.
- k. Confirm the password to complete the process.
- l. In the navigation pane, expand the objects to display the Publisher database; right-click the Publisher database and select **Properties**.
- m. Click the **Permissions** tab and grant all permissions to the Publisher database user.

To create the Workflow database user and database:

1. Create the Workflow database with the following properties:
  - Configure the database server so that it is case-insensitive.
  - Create a database with the name you planned when you completed the worksheets provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.
  - Configure the initial size of the database. For a relatively small installation, configure a database that is at least 100 MB. For a large enterprise with as many as 20,000 users, configure a database that is as large as 1 GB.
2. Create the Workflow database user:
  - a. To open the Enterprise Manager: click **Start | Programs | Microsoft SQL Server | Enterprise Manager**.
  - b. In the navigation pane, expand the objects to display subfolders of the **Security** folder.
  - c. Right-click the **Logins** icon; then click **New Login**.
  - d. In the **SQL Server Login Properties** dialog box, enter the user name you designated for the Workflow Server database user when you completed the worksheets provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.

- e. In the Authentication area, choose **SQL Server Authentication** and enter the corresponding password.
- f. On the **General** tab, in the Defaults section, select the Workflow database.
- g. Click the **Database Access** tab.
- h. In the **Specify which databases can be accessed by this login** box, check the Workflow database.
- i. In the **Database roles for *database\_name*** box, check **public** and **db\_owner**.
- j. Click **OK**.
- k. Confirm the password to complete the process.
- l. In the navigation pane, expand the objects to display the Workflow database; right-click the Workflow database and select **Properties**.
- m. Click the **Permissions** tab and grant all permissions to the Workflow database user.

## Creating Tablespaces and Database Users on Oracle

To create the Publisher and Workflow database users:

1. On the host computer for the Foundation database server, open the Oracle Enterprise Manager Console.
2. Log into the portal database instance and create a new tablespace for Publisher.
3. Expand the storage capacity of the newly created Publisher tablespace:
  - a. Select the Publisher data file.
  - b. Click the **Storage** tab.
  - c. Click **Automatically extend data file**.
4. From Security, create a new user with the user name you designated for the Publisher database user when you completed the worksheets provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.
5. Grant the user default ownership of the newly created Publisher tablespace.
6. Grant the user the additional **Resource** role.
7. Create a new tablespace for the Workflow.

## Pre-Installation Steps

8. Expand the storage capacity of the newly created Workflow tablespace:
  - a. Select the Workflow data file.
  - b. Click the **Storage** tab.
  - c. Click **Automatically extend data file**.
9. From Security, create a new user with the user name you designated for the Workflow database user when you completed the worksheets provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.
10. Grant the user default ownership of the newly created Workflow tablespace.
11. Grant the user the additional **Resource** role.

# Installing Publisher

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

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

To install Publisher software:

1. Ensure that you have completed the pre-installation steps. See [Chapter 3, “Pre-Installation Steps.”](#)
2. If the Image Service is installed on a different computer, you must also run the installer on that computer. Choose **Custom** when the installer wizard asks you to choose components to install. Install the Publisher component on the Publisher host computer. Install the Image Service component when you run the installer on the computer hosting the Image Service.
3. Log in to the host computer for the Publisher deployment as the local administrator.
4. Copy the installer (For Windows, **ALIPublisher\_v6-3.exe** and for UNIX, **ALIPublisher\_v6-3**) to the location from which you plan to launch it.
5. Close all unnecessary applications and windows.
6. To launch the installation wizard, double-click the **ALIPublisher\_v6-3.exe /ALIPublisher\_v6-3** file.

7. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the configuration worksheets provided in the *Installation Worksheet for AquaLogic Interaction Publisher 6.3*.

**Table 4-1 Installation Wizard Pages**

Wizard Page	Description
License Agreement	Read and accept the license agreement.
Choose components	Choose Publisher or Image Service files. Workflow and Publisher Search Libraries are automatically installed with Publisher. A custom installation allows you to install Publisher and Image Service files separately.
Configuration	Choose Full Configuration or Published Content Configuration. If you choose Published Content Configuration, the installation of Publisher will only be available for redirecting to published content.
Installation Folder	Accept the default installation folder or choose a different folder in which to install Publisher.
Application Host and Port	Enter the fully qualified domain name and port number that Publisher's web components will use to handle requests. Indicate whether the components should use http or https. Example host: publisher.mycompany.com Default port: 7087
Publisher Database	Choose either SQL Server or Oracle as the database Publisher will use. <b>Note:</b> Windows only. The UNIX installation is Oracle only.
Publisher Database Connection Information	Enter the database connection information. SQL Server Default port: 1433 Oracle Default port: 1521
Workflow Database	Choose either SQL Server or Oracle as the database Workflow will use. <b>Note:</b> Windows only. The UNIX installation is Oracle only.
Workflow Database Connection Information	Enter the database connection information. SQL Server Default port: 1433 Oracle Default port: 1521
Portal Database	Choose either SQL Server or Oracle as the database Publisher will use. <b>Note:</b> Windows only.

**Table 4-1 Installation Wizard Pages**

Wizard Page	Description
Portal Database Connection Information	Enter the database connection information. SQL Server Default port: 1433 Oracle Default port: 1521
Specify Image Service Folder	Enter the Image Service information. Default locations are: On Windows: C:\bea\alui\ptimages On UNIX: /opt/bea/alui/ptimages.
Published Content	Choose whether to use defaults or Custom Configuration for published content. Publisher uses the Published Content URL to access published content. The Published Content Folder stores content published by Publisher. If you select Custom Configuration, the Custom Published Content Configuration panel appears next in the wizard. Default Published Content URL: http://<computer_name>:<port>/publishedcontent Default Windows Published Content Folder: <install_root>\ptcs\publishedcontent Default UNIX Published Content Folder: <install_root>/ptcs/publishedcontent
Custom Published Content Configuration	If you chose defaults in the Published Content panel, this panel does not appear; however, if you chose Custom Configuration, enter the Published Content URL and Published Content Folder.
Document Repository Service	Enter the fully qualified domain name and port number for the portal Document Repository Service. Example host: doc-repository.mycompany.com Default port: 8020
Search Service	Enter the fully qualified domain name and port number for the Search Service. Example host: searchhost.mycompany.com Default port: 15244
SMTP Notification Settings	To enable SMTP notification of Publisher events, complete SMTP server and address information. Enter the name of the SMTP server that is used for notification emails for Workflow assignments and the email address of the administrator. Example: mail.mycorp.com, portaladmin@mycorp.com

**Table 4-1 Installation Wizard Pages**

Wizard Page	Description
Authenticaiton Information	Specify the authentication ID and password for the portal to use when it connects to Publisher. Default Authentication ID: authenticationid
Default Language	Choose the language for searching Publisher items.

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



# Post-Installation Steps

After you run the installer, complete the following steps:

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

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

## Import the Workflow Database Schema

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

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

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

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

## Creating the Workflow Database Schema on SQL Server

To create the Workflow schema:

1. Copy the `<install_root>\ptworkflow\6.3\sql\mssql\create_schema.sql` file from the Publisher host computer to the Workflow database host computer.
2. On the Workflow database host computer, open the SQL Server Enterprise Manager and log into the Workflow database as the Workflow database user. For information on the Workflow database and database user, see [“Creating Databases and Database Users on SQL Server” on page 3-3.](#)
3. Open and execute the `create_schema.sql` script.
4. After the script has been run, open the Workflow tablespace and verify that the schema tables have been successfully created.

## Creating the Workflow Database Schema on Oracle:

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

To create the Workflow Server schema:

1. Copy the script file from the host computer for Publisher to the host computer for the portal database.
2. On the host computer for the Workflow database, open the Oracle Enterprise Manager Console.
3. Change directory to the location of the Workflow schema scripts.  
`<install_root>\ptworkflow\6.3\sql\oracle9.2` or  
`<install_root>\ptworkflow\6.3\sql\oracle10`
4. Start SQLPlus.
5. Log into the Workflow database instance as the Workflow database user. For information about the Workflow database user, see [“Creating Tablespaces and Database Users on Oracle” on page 3-5.](#)
6. Type `@create_schema.sql` to execute the `create_schema` script.

7. After the script has been run, open the Workflow tablespace and verify that the schema tables have been successfully created.

To increase maximum cursors:

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

## Import the Publisher Migration Package

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

To migrate the Publisher .pte file:

1. Make sure that the AquaLogic Interaction Administrative Portal and AquaLogic Interaction Search are running.
2. Log into the Administrative Portal.
3. Go to the **Administration** directory.
4. From the **Select Utility** drop-down, choose **Migration - Import**.
5. Click **Browse** and locate the **publisher.pte** file in <install root>\ptcs\6.3\serverpackages\. Click **Open**.
6. Click **Load Package**.
7. Select **Overwrite Remote Servers**.
8. Click **Finish**.

## Start Publisher and Workflow

Make sure the AquaLogic Interaction Search and Document Repository services are running before starting the Publisher service.

## Starting Publisher

### Windows:

From Services, select and start the BEA AquaLogic Publisher service.

Or, from the command line, run

```
$ <install base>\ptcs\6.3\bin\service.bat start
```

### UNIX:

From the command line, run

```
$ <install base>/ptcs/6.3/bin/service.sh start
```

## Starting Publisher as a Console Program

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

### Windows:

From the command line, run

```
$ <install base>\ptcs\6.3\bin\service.bat console
```

### UNIX:

From the command line, run

```
$ <install base>/ptcs/6.3/bin/service.sh console
```

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

## Stopping Publisher

To stop the Publisher service:

### Windows:

From Services, select and stop the BEA AquaLogic Publisher Service.

From the command line, run

```
$ <install base>\ptcs\6.3\bin\service.bat stop
```

### UNIX:

From the command line, run

```
$ <install base>/ptcs/6.3/bin/service.sh stop
```

## Verify Your Publisher Installation

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

In a browser, access the Publisher diagnostics page:

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

For example,

`http://dev01.bea.com:7087/ptcs/console/index.jsp`

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

You can also access the Workflow diagnostics page:

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

For example,

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

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

## Import the Published Content Portlets Migration Package

**Caution:** Publisher must be running before you import this package.

In Publisher 6.3 the default portlet templates are installed under language subfolders: **de**, **en**, **fr**, etc. If you are upgrading from Content Server 5.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.x installs of Content Server *without* Branding, all six portlet templates are under the Published Content Portlets folder. In 5.x installs of Content Server with Branding, the **Header**, **Footer**, and **Content Canvas** portlet templates are under the **Content Server | Branding** folder and the **News**, **Community Directory**, and **Announcement** portlet templates are under the **Content Server | Published Content Portlets** folder.

To delete the 5.x portlet templates:

1. Log into the Administrative Portal.

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

To import the Published Content Portlets migration package:

1. Log into the Administrative Portal.
2. Go to **Administration**.
3. From the **Select Utility** drop-down choose **Migration - Import**.
4. Click **Browse** and locate the **published\_content\_portlets.ptc** file in **<install root>\ptcs\6.3\serverpackages\**. Click **Open**.
5. Click **Load Package**.
6. Click **Finish**.

After the migration is complete, a new folder called “Portlet Templates” appears in Publisher Explorer containing the Publisher objects that comprise the default portlet templates. If you are upgrading from 6.0, 6.1, or 6.2, 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.

# Upgrading Publisher

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

**Table 6-1 Upgrade Paths**

Upgrade Path	Upgrade References
5.x - 6.3	Follow the procedures in <a href="#">“Upgrade Steps” on page 6-1</a>
6.x - 6.3	If you are upgrading from 5.x, you will need to update the Web service UUIDs in the portal database. See <a href="#">“Upgrade The Web Services UUIDs in the Portal Database” on page 6-4</a> If you are upgrading from 5.x or 6.0, see <a href="#">“Additional Information for Content Server 5.x and 6.0 Upgrades” on page 6-5</a>
4.x to 6.3	You must first upgrade to Content Server 5.0.2 or higher, then upgrade to Publisher 6.3. Refer to the <i>Installation and Upgrade Guide for Plumtree Content Server</i> for version 5.0.4. Follow the instructions in that guide for upgrading to 5.0.4, including all of the 4.x post-upgrade instructions. Validate that you can bring up portlets in the 5.0.4 state before starting the 6.3 upgrade.

## Upgrade Steps

To upgrade to Publisher 6.3:

1. Read the release notes for a summary of features introduced or changed in this and all previous releases.

2. Complete all pre-installation steps. For details, see [Chapter 3, “Pre-Installation Steps.”](#)
3. Log onto the machine on which you will be doing the install as a local administrator. It is assumed that this is the application server that hosts the preexisting version of Content Server/Publisher.
4. Uninstall the old version of Content Server/Publisher. Ensure that the application is removed from the application server after uninstall.  
**Note:** This is recommended; however, in a development environment, the old version of Content Server/Publisher can coexist with Publisher 6.3 if they are configured to listen to different ports.
5. Stop the Workflow service.
6. Back up your existing AquaLogic Interaction Portal, Content Server/Publisher, and Workflow databases. Restore only if you abort the installation.
7. Install Publisher software as described in [Chapter 4, “Installing Publisher.”](#) When the installer prompts you, reboot the machine.

If you do not reboot, certain PATH environment variable changes might not take effect, and you will get errors when you try to deploy and start the applications.

You do not need to reboot a UNIX machine.

**Note:** Although you will enter information about the default published content location and URL in a Publisher installer panel, Publisher 6.3 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.



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

**Table 6-2 Workflow Database Upgrade Instructions**

Content Server Configuration	Workflow Database Upgrade Instructions
<b>Content Server 5.x, 6.0, or 6.1; no existing Workflow database.</b>	<ul style="list-style-type: none"> <li>Create a Workflow database and user with the information you entered in the installer. Refer to <a href="#">“Creating Databases and Database Users for Publisher” on page 3-3</a> for full details on database and user creation for the database you are using.</li> <li>Log into SQL Query Analyzer or SQL Plus as the Workflow database user. <ul style="list-style-type: none"> <li><b>For SQL Server:</b> Run the script &lt;install_root&gt;\ptworkflow\6.3\sql\mssql\create_schema.sql.</li> <li><b>For Oracle:</b> Run the script &lt;install_root&gt;\ptworkflow\6.3\sql\oracle9.2\create_schema.sql. or &lt;install_root&gt;\ptworkflow\6.3\sql\oracle10\create_schema.sql depending on your version of Oracle.</li> </ul> </li> </ul>
<b>Content Server 5.x; existing Workflow database.</b>	<ol style="list-style-type: none"> <li>Run the <b>create_schema.sql</b> script for your database.</li> <li>Run the dbupgrade.bat script: <ul style="list-style-type: none"> <li><b>Windows:</b> Run the script &lt;install_root&gt;\ptworkflow\6.3\bin\dbupgrade.bat.</li> <li><b>UNIX:</b> Run the script &lt;install_root&gt;/ptworkflow/6.3/bin/dbupgrade.sh.</li> </ul> </li> </ol>
<b>Content Server 6.0, existing Workflow database</b>	<ul style="list-style-type: none"> <li><b>Oracle:</b> Run the script for your version of Oracle: &lt;install_root&gt;\ptworkflow\6.3\sql\oracle9.2\upgrade_schema6.1.sql &lt;install_root&gt;\ptworkflow\6.3\sql\oracle10\upgrade_schema6.1.sql</li> </ul> <p><b>Note:</b> There is no <b>upgrade_schema6.1.sql</b> script for SQL Server.</p>
<b>Content Server 6.1; existing Workflow database</b>	<ul style="list-style-type: none"> <li><b>Oracle and SQL Server:</b> Run the script appropriate to your database server: &lt;install_root&gt;\ptworkflow\6.3\sql\oracle9.2\upgrade_schema6.2.sql &lt;install_root&gt;\ptworkflow\6.3\sql\oracle10\upgrade_schema6.2.sql &lt;install_root&gt;\ptworkflow\6.3\sql\mssql\upgrade_schema6.2.sql</li> </ul>
<b>Publisher 6.2</b>	<ul style="list-style-type: none"> <li>No upgrade scripts are necessary.</li> </ul>

9. If applicable, modify the configuration files in `<installation_folder>\ptcs\6.3\settings\config` to configure your customized settings.
10. If applicable, restore SSL certificates to `<installation_folder>\common\jre\1.4.2\lib\security`.
11. Register the Content Server /Publisher objects with the portal. For details, see [“Import the Publisher Migration Package” on page 5-3](#).
12. After importing the **publisher.ptc** file, ensure that the Document Repository Service and Search Service are started. Then start Publisher.
13. Import the **published\_content\_portlets.ptc** file. For details, see [“Import the Published Content Portlets Migration Package” on page 5-5](#).
14. If you are upgrading from 5.0.x, upgrade the Web Services UUIDs in the portal database. For details, see [“Upgrade The Web Services UUIDs in the Portal Database” on page 6-4](#).  
**Note:** If your previous 5.0.x installation included a Branding Remote Server, this object can be safely deleted after upgrading to 6.3 because it is no longer used. To do so, go to your portal administration hierarchy, browse to the **Branding** folder and then delete the Branding Remote Server.
15. If your published content is on a remote server, you are done. If your published content is located on the same host as Publisher, copy or move your published content from the old location to the new install directory structure. If you have accepted all defaults, copy or move all files from  
`\plumtree\ptcs\publishedcontent`  
to  
`\bea\alui\ptcs\publishedcontent`
16. Point Publisher to the new published content location. From Publisher Explorer, right click on the root (plumtree) node and choose **Publishing Targets**.
17. Update the **Transfer Path** to point to the new published content location (see step 15).
18. If your Publisher port has changed, update the **Browser Path** to reflect the new port number.

## Upgrade The Web Services UUIDs in the Portal Database

If you have a preexisting 5.0.x portal and Content Server installation, it contains different Web services objects for the published content portlet templates (like the News Portlet Template) and

branding portlet templates (like the Header, Footer, or Canvas template). Publisher 6.3 replaces these 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 Web service for published content. This script affects only the portal objects that relate directly to Publisher and Workflow portlets and portlet template integration.

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

- For a MS SQL Server portal database, log into SQL Query Analyzer as the portal database user and run the SQL script  
`<install_root>\ptcs\6.3\sql\mssql\portal_upgrade_5.0_to_6.0.sql.`
- For an Oracle portal database, log into Oracle Enterprise Manager as the portal database user. Then open SQL\*Plus and run the SQL script  
`<install_root>\ptcs\6.3\sql\oracle9.2\portal_upgrade_5.0_to_6.0.sql.`

## Additional Information for Content Server 5.x and 6.0 Upgrades

The following are important differences between Publisher 6.3 and versions of Content Server prior to Content Server 6.1:

- **Simplified Deployment:** Publisher 6.3 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 6.3 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.
- **BEA AquaLogic Publisher Service:** After you install or upgrade to 6.3, there is a single service (or daemon on UNIX) that starts and stops both the Publisher and Workflow applications. The service is controlled from the Services control panel on Windows and from the command line on UNIX. In previous versions, Content Server was deployed to a separate application server, and Workflow was a standalone service. For more information on starting and stopping the Publisher Service, see [“Start Publisher and Workflow” on page 5-3](#)
- **Single port number:** The BEA AquaLogic Publisher Service runs on a single port number. In previous versions, the Content Server Web application ran on one port number, and the Workflow Server ran on a different port number. We recommend the use of port

## Upgrading Publisher

7087 for the BEA AquaLogic Publisher Service . Version 6.3 includes a container.conf file containing any port number settings that need to be changed after installation.

# Troubleshooting

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

- “[Reviewing Log Files](#)” on page 7-1
- “[Database Configuration Files](#)” on page 7-2
- “[Reconfiguring Publisher](#)” on page 7-2
- “[Diagnosing Unexpected Results](#)” on page 7-3

## Reviewing Log Files

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

- AquaLogic\_Interaction\_Publisher\_InstallLog.log
- content\_register.log
- workflow\_register.log
- imageserver\_register.log (This is created only for Image Service installations).

If you encounter problems after installation, review the `<install_root>\ptcs\6.3\logs\service.log` file to help diagnose and correct the problem.

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

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

For example, `http://dev01.bea.com:7087/ptcs/diagnosticTests.jsp`

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

For example, `http://dev01.bea.com:7087/wfconsole`

## Database Configuration Files

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

`<install_root>\ptcs\6.3\settings\config\`

Similarly, there is a Workflow database configuration file that is populated with information that you entered in the Publisher installer. This file, **application.conf**, is installed in the following directory:

`<install_root>\ptworkflow\6.3\settings\config`

## Reconfiguring Publisher

If the installation verification tool reports configuration errors, review the configuration decisions you recorded on the configuration worksheets provided in *Installation Worksheet for AquaLogic Interaction Publisher 6.3* and re-run the installer.

## Diagnosing Unexpected Results

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

**Table 7-1 Troubleshooting**

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

**Table 7-1 Troubleshooting**

Symptom	Possible Solution
Port conflict, port in use, BindException	<p>Port numbers for HTTP and HTTPS are configured in <b>&lt;install_root&gt;/ptcs/6.3/settings/config/service.conf</b>. Edit the http and https settings in <b>service.conf</b> to set the value to an available port. The service must be restarted to pick up changes made in the configuration file. Note that changes to a service port number require corresponding changes to any web service or remote server settings which may reference that port number.</p>
Memory consumption, Out of Memory Errors	<p>The maximum amount of memory, in megabytes, that the service JVM will be allowed to use is controlled by the <code>wrapper.java.maxmemory</code> property, configured in the file <b>&lt;install_root&gt;/ptcs/6.3/settings/config/service.conf</b>. For example, the following line shows a maximum memory setting of 1 GB:</p> <pre>wrapper.java.maxmemory=1024</pre> <p>The setting corresponds directly to the <code>-Xmx</code> parameter used by the java executable. The default value of this setting in the config file will be adequate for most configurations. For large production configurations, especially those in which the service is installed on a dedicated host machine, this value should be set as high as possible (e.g. 1024 or 1536) but should always remain below the amount of physical RAM on the host machine.</p>

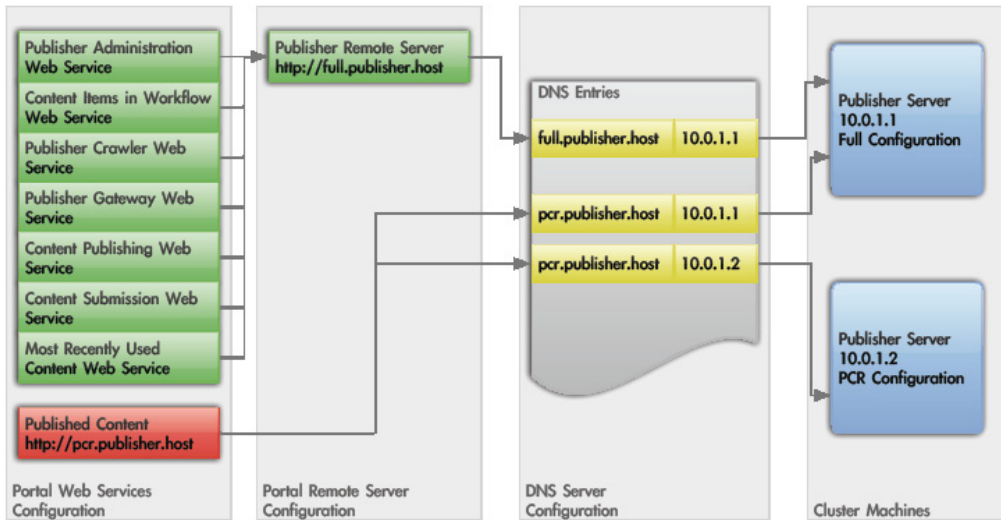


# Clustering

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

[Figure A-1](#) gives an overview of the highly available published content configuration. Clustering involves the mapping of multiple IP addresses to a single machine domain name, sometimes referred to as the ‘virtual host’ (see ‘`pcr.publisher.host`’ in [Figure A-1](#)).

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

**Figure A-1 High-Availability Published Content Configuration**

## Deploying Published Content Separately from the Publisher in the Full Configuration

### Undeploying Published Content from the Default Location

To undeploy published content from the default location:

1. Delete  
`<install_root>/ptcs/6.3/container/conf/jboss.web/localhost/publishedcontent.xml.`
2. Deploy published content in any other Web server.
3. Change the publishing targets in the Publisher Explorer.

### Installing the Second Publisher

To perform a second installation on a different machine:

1. Run the Publisher installer.
2. On the Configuration page in the installation wizard, select Published Content Configuration.
3. On the Publisher Database and Portal Database pages, use the same Publisher and Portal Database information that you entered for the full Publisher installation.

4. For the Authentication Information, use the same authentication information you entered for the full Publisher installation.

## Configuring AquaLogic Interaction

1. Set up your virtual host.

This virtual host should map to your full Publisher as well as the Published Content Configuration installation. You can either use a DNS Server or the Registry. Refer to the *Deployment Guide for BEA AquaLogic User Interaction G6* and *Knowledge Base Article #10613: INFO: MPPE Load Balancing: Frequently Asked Questions (FAQ)*.

2. Change the Published Content Web Service portlet URL:
  - a. Log in to the portal.
  - b. Click Administration.
  - c. In the Admin Objects Directory, open the folder in which the Publisher web services were created.
  - d. On the Administration page, select the Published Content web service.
  - e. In the Web Service Editor, under HTTP Settings, change the portlet URL by entering the full URL to the virtual host.

It should look something like this:

**http://<virtual\_host\_name>:<virtual\_host\_port>/ptcs/published\_content\_redirect.jsp.**

**Note:** The URL prefix is ignored if the value in the text box begins with “http://” or https://.

3. Start the Published Content Configuration.

**Windows:** From the Services control panel, select and start the BEA AquaLogic Publisher Redirector service. Or, from the command line, run

**\$<install\_root>\ptcs\6.3\bin\service.bat start.**

**UNIX:** From the command line, run **\$<install\_base>/ptcs/6.3/bin/service.bat start.**

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

## Clustering

# Installer Properties File

The Publisher installer can take a properties file as an argument to configure many portal deployment properties. The installer expects this file to exist in the directory in which it is run. If it does not use a properties file to configure portal properties, it generates a file named **AquaLogic Interaction Publisher\_v6.3\_silent.properties** in the directory in which it is run. You can copy this file to subsequent host computers before you run the installer. This ensures consistent data entry for the portal properties contained in the file. These properties are described in the following table.

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

The table below shows sample contents of a properties file.

**Table B-1 Sample Properties File**

System Configuration/Property	Example Value
PRIMARY_IMAGE_SERVER_URL	http://<computer_name>:<port>/imageserver
SEARCH_SERVER_HOST	<computer_name>
SEARCH_SERVER_PORT	15244
PUBLISHED_CONTENT_URL	http://<computer_name>:<port>/publishedcontent
PUBLISHED_CONTENT_PATH	<b>Windows:</b> C:\bea\alui\ptcs\publishedcontent <b>Solaris:</b> /opt/bea/alui/ptcs/publishedcontent

**Table B-1 Sample Properties File**

System Configuration/Property	Example Value
AUTHENTICATION_ID	<authenticationid>
AUTHENTICATION_PASSWORD	<password>
DOCUMENT_REPOSITORY_HOST	<computer_name>
DOCUMENT_REPOSITORY_PORT	8020
PORTAL_DB_HOST	<computer_name>
PORTAL_DB_PORT	1433
PORTAL_DB_NAME	alidb
PORTAL_DB_LOGIN	alidbuser
PORTAL_DB_PASSWORD	<empty_field>
TEMPLATING_ENGINE_DB_HOST	<computer_name>
TEMPLATING_ENGINE_DB_PORT	1433
WORKFLOW_DB_HOST	<computer_name>
WORKFLOW_DB_PORT	1433
WORKFLOW_DB_NAME	workflowdb
WORKFLOW_DB_LOGIN	workflowdbuser
WORKFLOW_DB_PASSWORD	<empty_field>

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