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Percussion CM System

# Installing and Maintaining Packages

Version 7.03

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## CHAPTER 1

# About Installing and Maintaining Packages for Percussion CM System

To configure your Percussion CM System, install and configure solution packages on your Percussion CM Server. Percussion Software provides a variety of solution packages. Packages may also be available from Percussion business partners.

This document demonstrates the installation and configuration process using a simple set of packages:

- `perc.example`  
This package includes a simple Content Type (`perc.example.HelloWorld`) with some basic configurations.
- `perc.exshared`  
This package includes a shared field that can be included in the `perc.example.HelloWorld` Content Type. It is also a required dependency of the `perc.example` package.

These packages are installed with your Percussion CM Server in the directory `<CMServerRoot>/Packages/Percussion`.





## CHAPTER 2

# Installing and Configuring Packages

The example packages should be installed to a server that has at least one Community defined. The instructions that follow assume that the package is installed to a server with FastForward, including the associated Communities:

- Enterprise\_Investments
- Enterprise Investments\_Admin
- Corporate\_Investments
- Corporate\_Investements\_Admin

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## Installing the Example Packages

Use the Percussion Package Installer tool to install packages. The Package Installer tool is part of the Percussion CM System developer suite. In a suite installation on Microsoft Windows, the Package Installer tool is installed automatically with the rest of the Percussion CM Server Suite. If you install the server to a Solaris or Linux environment, you must install the developer tools suite on a Windows machine and connect to the Percussion CM server. For details about installing the developer tools suite, see "Installing Remote Client Components" in the document *Installing Rhythmyx*.

The example packages should be installed to a server that has at least one Community defined. The instructions that follow assume that the package is installed to a server with FastForward, including the associated Communities.

To start the Package Installer tool, click the Windows [**Start**] button, then choose *Programs > Percussion CM System > Package Installer*.

The Package Installer starts and the system displays the Package Installer interface

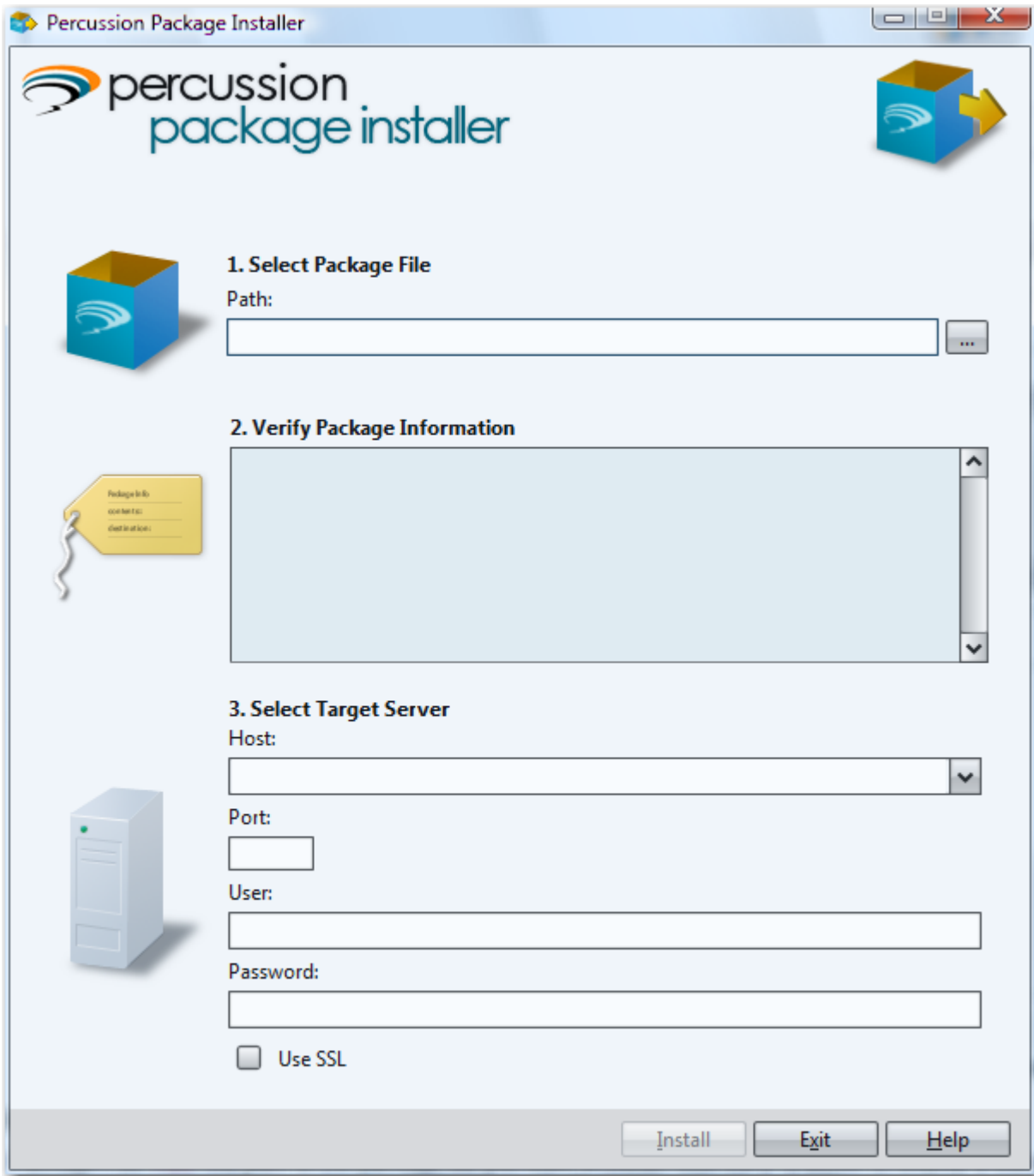


Figure 1: Package Installer dialog

The perc.exshared package is a required dependency of the perc.example package; you must install perc.exshared before installing perc.example. If you try to install perc.example before installing perc.exshared, installation will fail with the error "The following packages are required to install this package: perc.exshared".

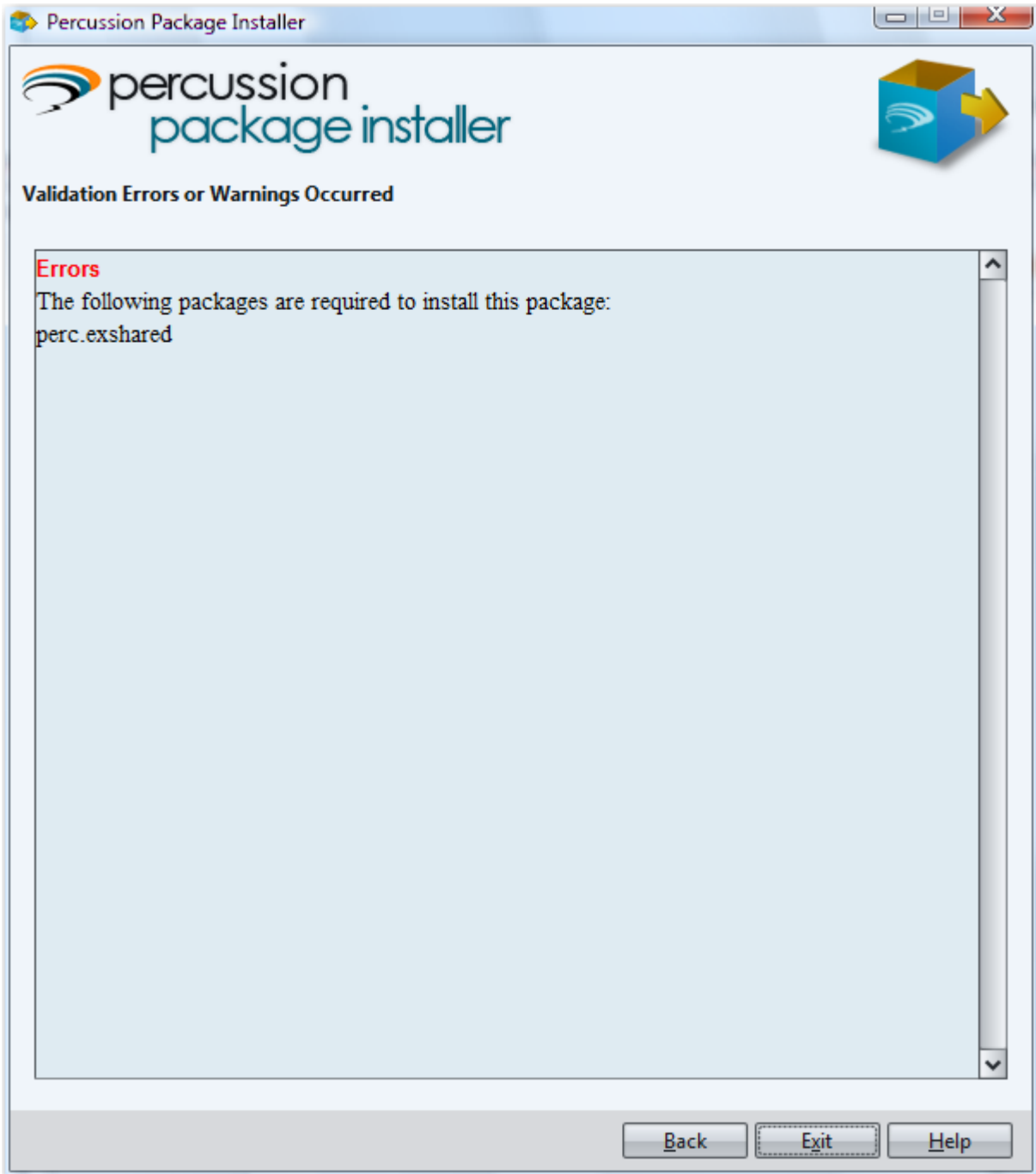


Figure 2: Error message if you try to install the perc.example package before installing perc.exshared

To install the perc.exshared package:

- 1 In the Select Package File box, click the browse button next to the Path field. In the popup browse dialog, go to <CMServerroot>/Packages/Percussion and select the *perc.exshared* package. Click the [OK] button.

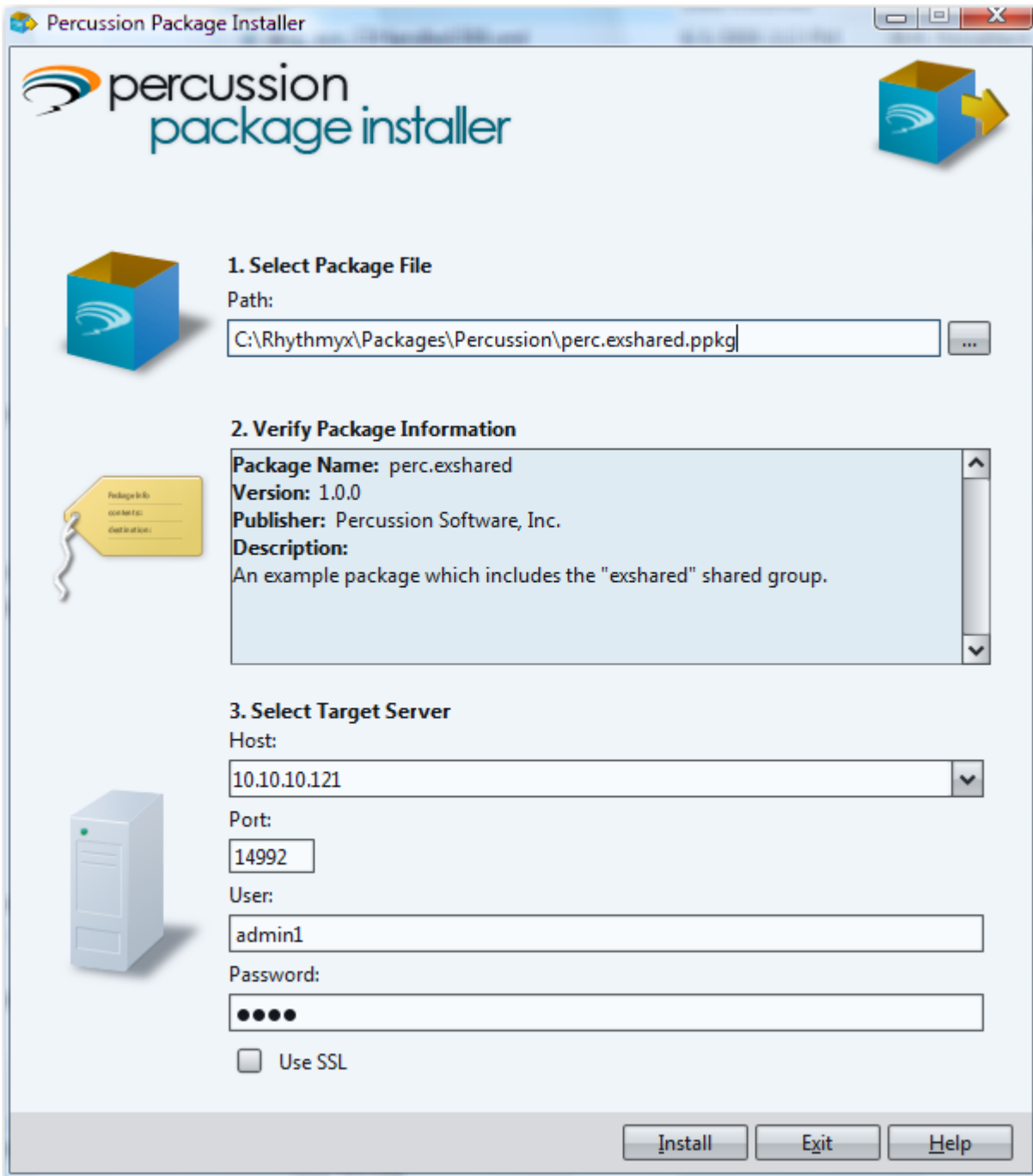


Figure 3: Package Installer with perc.exshared package selected

When you choose a package, the Package Installer tool adds the path you specified to the Path field, and displays package data in the **Verify Information About Package** field. Use this data to confirm that the package you are installing is the correct package. When you choose the perc.exshared package the Package Installer tool should display the information illustrated in the screenshot above.

- 2** Enter the data used to connect to the server:
  - a) In the **Host** field, enter the name or IP address of the machine where you installed the Percussion CM Server.
  - b) In the **Port** field, enter the port used by the Percussion CM Server (9992 by default).
  - c) In the **User** field, enter the user name you use to log in to the Percussion CM Server. In the **Password** field, enter that user's password.
  - d) If your Percussion CM Server is configured to allow secure connections and you want to use a secure connection, check the **Use SSL** box.
- 3** To start the installation, click the [**Install**] button.

While the package is installing, the Package Installer tool displays a status message

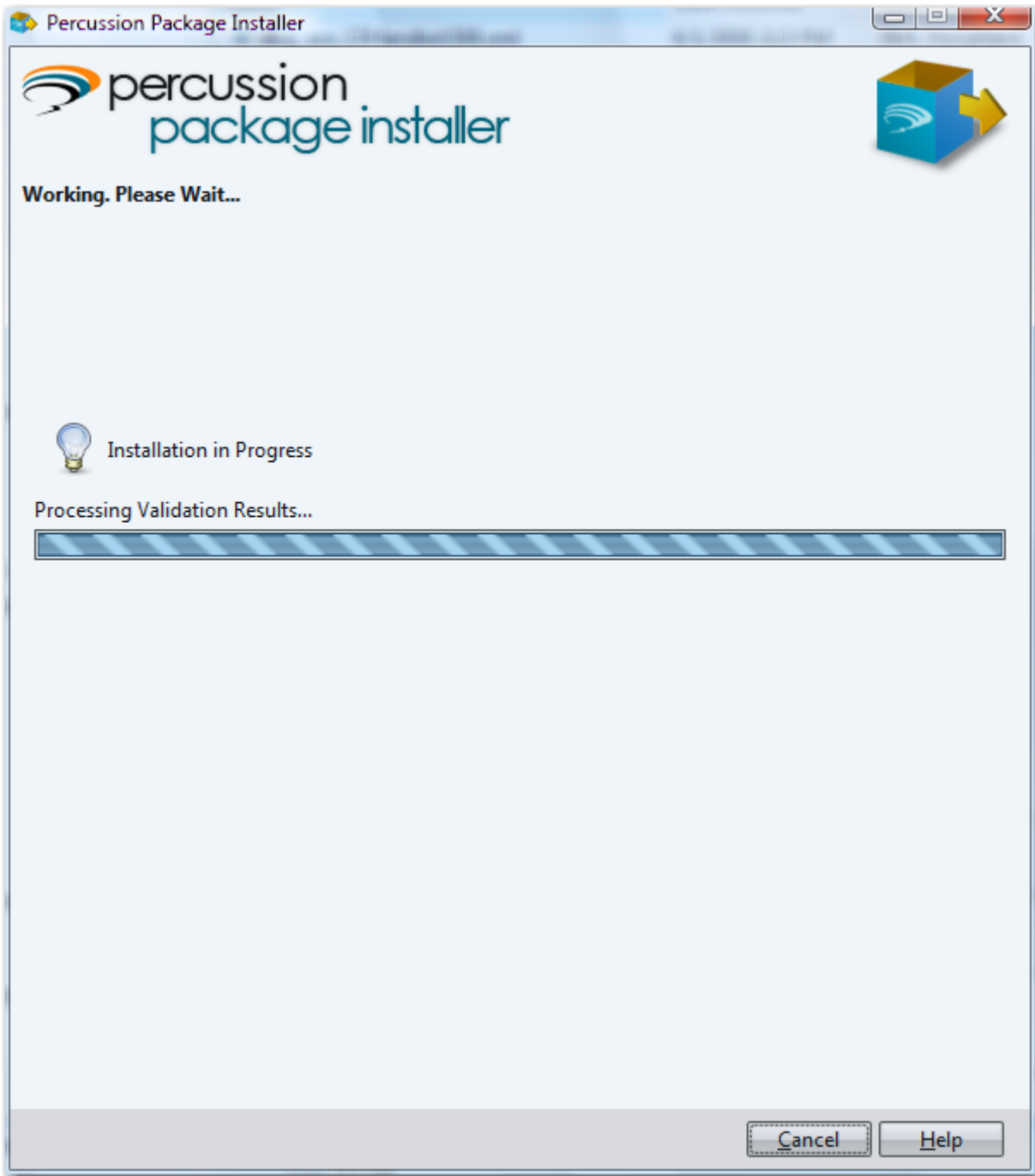


Figure 4: Installer Status

If a problem occurs during the installation, the Package Installer notifies you about it. A problem is either a *warning* or an *error*.

If a warning occurs, the Package Installer displays the warning and gives you the option of ignoring the warning and continuing the installation. Two warnings may occur when installing a package:

- **Already exists**  
The design object you are trying to install already exists. If you are installing the example packages, the design object is typically a table schema or ACL. This error usually occurs when you are re-installing the package after installing and deleting it. When you delete a package, most design objects are deleted, but table schemas are not. Continue with the installation and the package will take control of the design object.
- **This object has been modified outside of allowed configuration.**  
The design object was modified directly in the Percussion CM Workbench or in some other way outside of standard configuration. This error usually occurs when you are re-installing the package after an initial installation, but not deleted the package in the meantime. Continue with the installation and the design object will be updated to match the package configuration.

If an error occurs, the package cannot be installed. Installation stops. Abort the installation and correct the problem. Errors that may occur when installing the example packages include:

- **The following packages are required to install this package: perc.exshared**  
You are trying to install the perc.example package before installing the perc.exshared package. The package perc.exshared is a required dependency of the package perc.example, and must be installed before you can install perc.example. Install perc.exshared before installing perc.example.
- **The following package dependencies differ from the version installed: perc.exshared**  
You are installing a version of the perc.example package that requires a later version of perc.exshared than you currently have installed. Download the latest versions of the packages from the Documentation forum of the Percussion Technical Support Forum and install them.
- **The package version you are trying to install is 1.0.0 and the version already installed is 2.0.0. You cannot install an older version of the same package.**  
You are reinstalling a package and a later version of the package you are installing is currently installed on the server. Download the latest versions of the packages from the Documentation forum of the Percussion Technical Support Forum and install them



When installation of the package is complete, the Package Installer displays a message similar to the following.



*Figure 5: Successful install of perc.exshared package*

After you install the perc.exshared package, install perc.example using the same procedure.

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## Configuring Community Visibility of the Example Packages

In Percussion CM Server, both design objects and Content Items exist in Communities. Communities help control user access to both design objects and Content Items. (Other factors, such as Workflow, also help control this access.)

When you initially install a package, the design objects in the package are not associated with any Communities. You must define Community associations to allow users in the Communities to access the design objects.

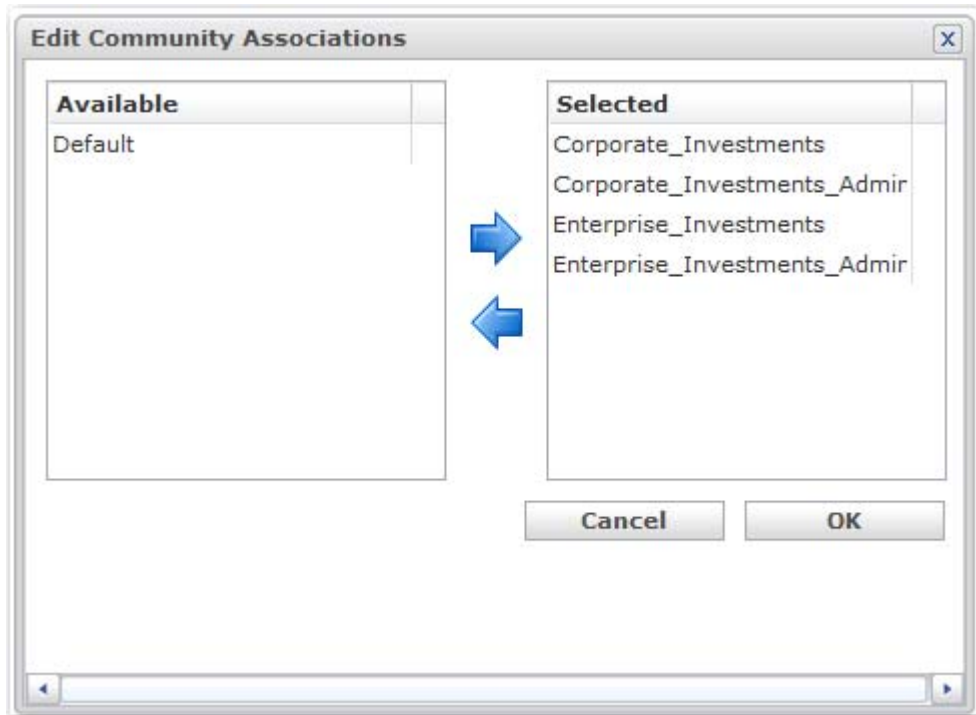
Note that shared field groups need not be explicitly associated with Communities. Shared field groups inherit Community visibility from the Community visibility of the Content Types with which they are associated. Thus, we only need to configure Community Visibility for the perc.example package.

In this exercise, we will associate the perc.example package with the Communities included in the FastForward reference implementation. You can substitute the Communities defined on your system.

To configure Community visibility of the perc.example package:

- 1** Log in to the Percussion Package Manager. To log in to Percussion Package Manager:
  - a) Start a browser and enter `http://localhost:9992`, where *localhost* is the name or IP address of your Percussion CM server and *9992* is the Percussion CM Server port.  
The server directs you to the Percussion CM System Application Server Home Page.
  - b) Click the [Package Management](#) link.
  - c) The server directs you to a login page. Enter your username and password. (Note: The user must have administrative rights to access the Package Manager.)
  - d) Click **[OK]**.  
The server directs you to the Package Manager.
- 2** Click the Visibility tab.  
The default view on the Visibility tab is the Packages by Community view.
- 3** Select the perc.example package.
- 4** Click the **[Edit Associations]** button.  
Package Manager displays the Edit Community Associations dialog.
- 5** In the Available List, select the following Communities: Enterprise\_Investments, Enterprise\_Investments\_Admin, Corporate\_Investments, Corporate\_Investments\_Admin.

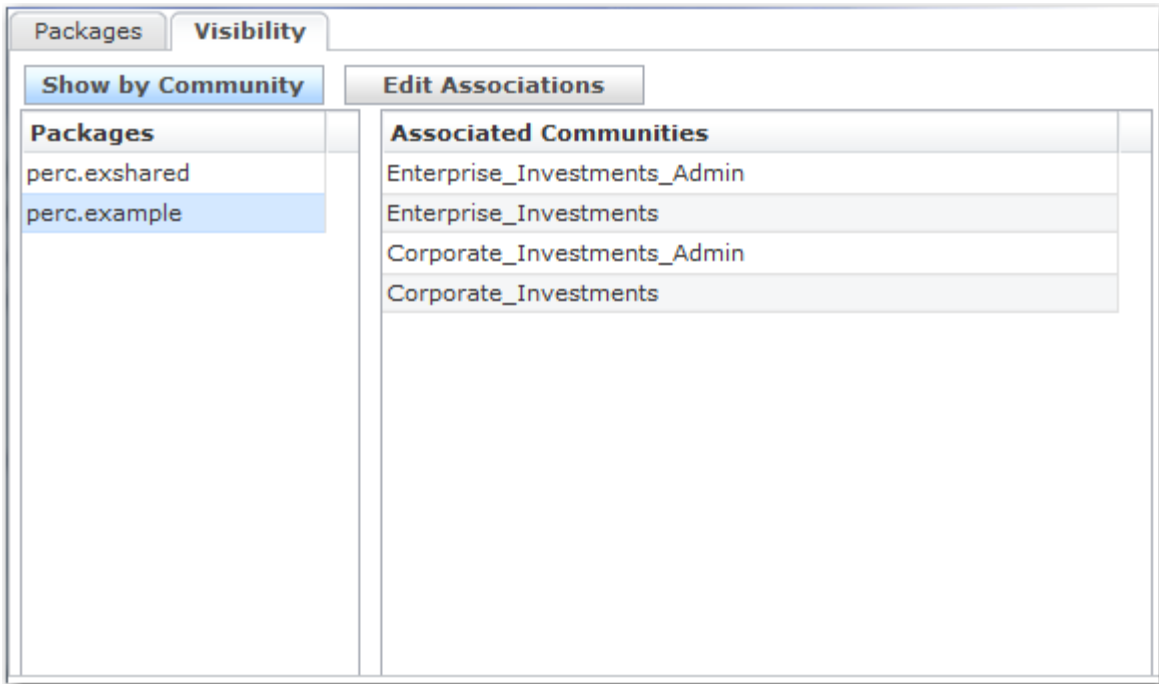
- 6 Move the selected Communities to the Selected list. You can use drag and drop or click on the arrow to move the selected Communities.



*Figure 6: Communities selected on the Edit Community Associations dialog*

- 7 Click **[OK]**.

The server updates your configurations and displays the results in Package Manager.



*Figure 7: Package visibility configured*

Once you have configured Community visibility, you can update your package configurations.

Note that you do not have to configure Community visibility before other configurations, but it is generally a good idea so you can see the effect of your configurations on the design objects in the package.

## Configuring the perc.example Package

Once you have installed a package, you can configure it to match your needs. For each package, a configuration file is created in the directory `<CMServerroot>/rxconfig/Packages/LocalConfigs`. The name of the configuration file is `<packagename>_localConfig.xml`, where `<packagename>` is the name of the package. Thus, the configuration file for the `perc.example` package is `perc.example_localConfig.xml`.

To confirm that you have configured Community visibility correctly for the `perc.example` package, log in to Content Explorer, and in the Menu bar, choose *Content > New > New Item > HelloWorld*.

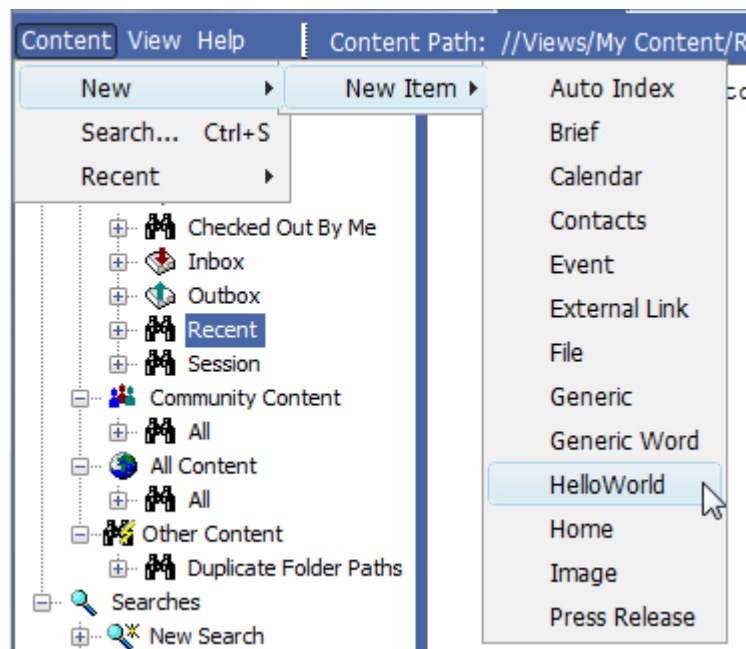
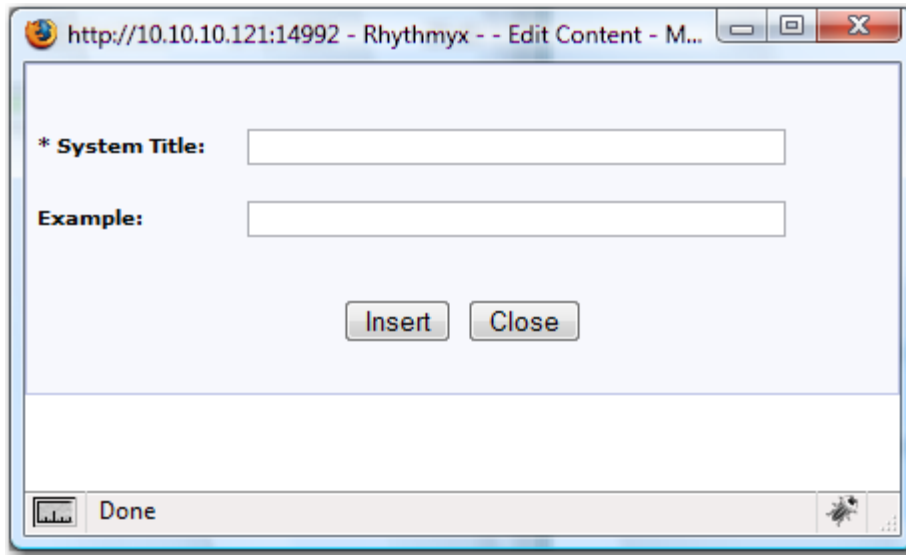


Figure 8: New Item menu with HelloWorld Content Type selected

The system should return the HelloWorld Content Editor:



*Figure 9: HelloWorld Content Editor*

The HelloWorld package includes three configurations:

- the Label of the perc.example.HelloWorld Content Type;
- the Label of the Example field; and
- adding the NewField from the Shared Field Set included in the perc.exshared package.

Let us examine how these configurations affect the system. Open the file `perc.example_localConfig.xml` in an XML editor or a simple text editor, such as Notepad or vi. Find the following lines of code:

```
<propertySet name="ct">  
  <property name="label" value="HelloWorld"/>  
</propertySet>
```

Change the value of the label property from *HelloWorld* to *HelloEI*. Save the file. Refresh Content Explorer, and in the Menu bar, choose *Content > New > New Item*. Notice that where before the list of available Content Types included HelloWorld, it now includes HelloEI.

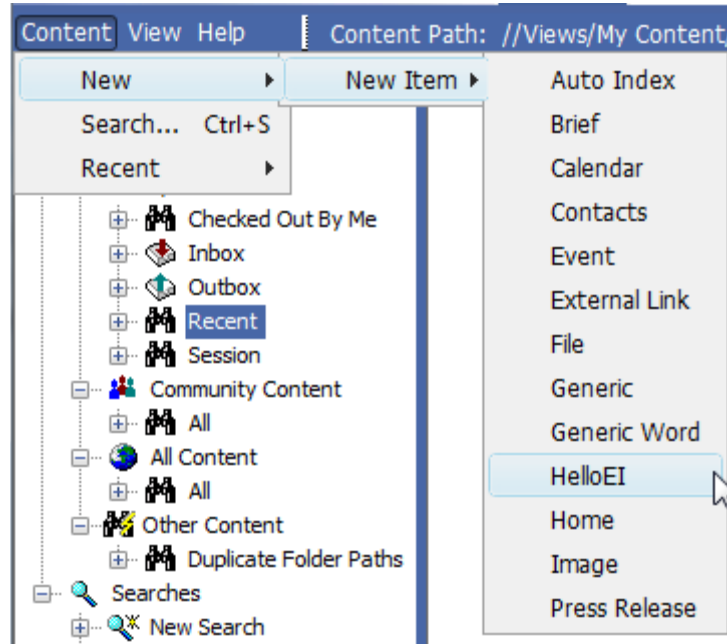


Figure 10: New Item menu after modifying the configuration, showing the Content Type as HelloEI

If you create a new Content Item of this type, you will notice that nothing has changed in the Content Editor.

Go back to `perc.example_localConfig.xml` in the simple text editor and find the following code:

```
<propertySet name="Example">
  <property name="label" value="Example:" />
</propertySet>
```

In the label property, change Example to EI\_Local. Save the file. Refresh Content Explorer, and create a new Content Item of the HelloEI Content Type (which is the HelloWorld Content Type with a new label). Notice that the label of the Example field has changed to EI\_Local.

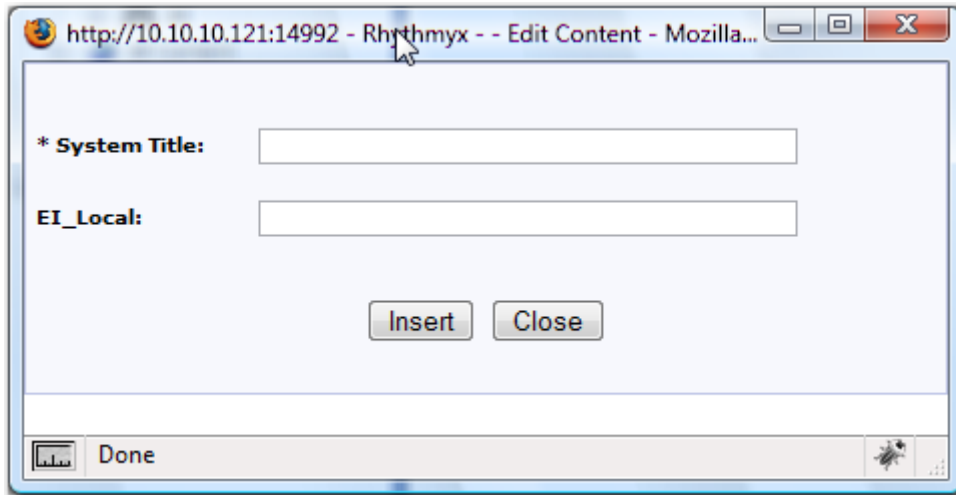


Figure 11: Hello\_EI Content Editor after modifying the configuration of the Example field

Go back to perc.example\_localConfig.xml in the simple text editor and find the following code:

```
<!--  
<propertySet name="NewField"/>  
-->
```

Remove the comment formatting (the <!-- and -->). Save the file. Refresh Content Explorer and create a new Content Item of the HelloEI Content Type. The Content Editor now contains the NewField from the Shared field set:

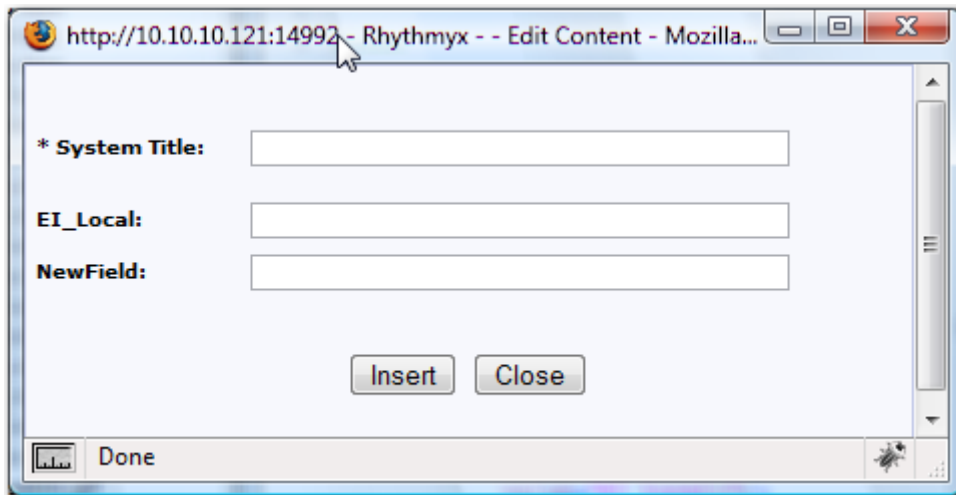


Figure 12: Hello\_EI Content Editor With New Field



## CHAPTER 3

# Installing and Configuring Vendor Packages

Packages are available from Percussion Software and Percussion business partners to provide a variety of capabilities. Once you have obtained your package, install it using the Package Installer tool as illustrated in *Installing the Example Packages* (on page 10).

The package vendor should provide documentation describing the configurations that are available in the package, and the valid values for each configuration. Consult that documentation to determine how to configure a specific package.

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## Distributed Properties

Some design objects properties can be configured in groups, including

- Content Type/Templates associations within a Slot
- Location Schemes
- Relationship Effects
- Site/Template visibility
- Site variables (also called Context variables)

Multiple packages may provide configurations for these properties. The first package to apply such a configuration "owns" that configuration. If a subsequent package attempts to apply configurations to that property, the system will return an error and configuration of that package fails. You must remove the configuration from the later package before it can be configured successfully. If you need to change the configuration of the property to make the subsequent package work or to achieve a desired result, you must modify the configuration of the original package.

In addition to modifying existing configurations, you can merge new properties into the configuration of a distributed property. When you uninstall a package that owns configurations, any merged configurations are deleted.

## CHAPTER 4

# Managing Packages

You may need to review information about your packages, such as:

- whether the package has been uninstalled;
- whether the package was configured successfully;
- the publisher of the package;
- the version of the package; and
- the last time the package was modified and who made the modification. Use the Percussion Package Manager to review this information. For details about accessing Percussion Package Manager, see *Configuring Community Visibility of the Example Packages* (on page 18).

In addition to reviewing data about the package, you can use the Percussion Package Manager to

- verify package configurations;
- reapply package configurations;
- reapply visibility configurations;
- uninstall packages. You may also want to restore the default configuration of the package.

## Verifying Package Configurations

Verifying a package allows you to check the following conditions:

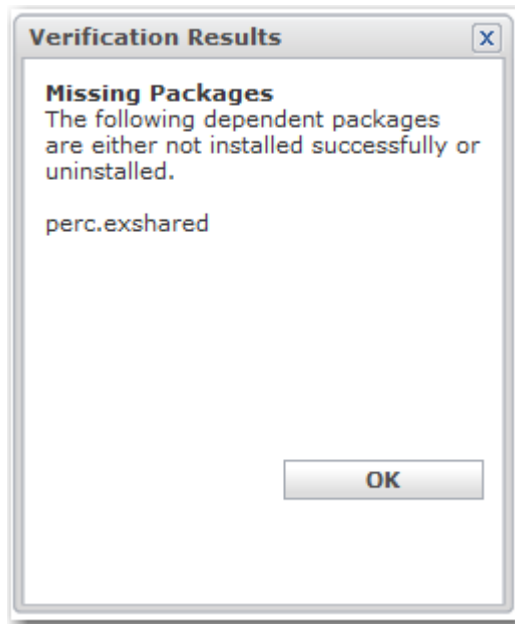
- whether the package was modified outside of standard configuration (for example in the Percussion Workbench); or
- whether a package dependency is missing

To verify a package, check the box in the row of the package you want to verify, then click the **[Verify]** button. If any design objects in the package have been modified outside of configuration, the system displays a message with a list of modified design objects.



*Figure 13: Message returned when design objects have been modified outside of configuration*

If any dependencies are missing, the system displays a message with a list of missing dependencies.



*Figure 14: Message returned when a dependency is missing*

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## Reapplying Configurations

Package configurations can be reapplied. For example, you may want to reapply configurations if design objects were modified outside of configuration, such as directly in the Percussion Workbench.

If you create new design objects of the same type as are included in a package, the configurations will be applied to the new design objects when reapplying the configurations. For example, suppose you have installed a package that includes one or more Sites, which all have a set of Context Variables. Later you add a new Site to your implementation. To add the existing Context Variables to your new Site, update the configurations to add Context Variable values for the new Site, then reapply the configuration. The Context Variables will be added to the new Site.

To reapply package configurations, check the box in the row of the package whose configurations you want to reapply, then click the **[Reapply]** button and from the drop list, choose *Configuration Settings*. The server attempts to reapply the configurations and returns a message indicating whether the processing was successful.

---

## Reapplying Package Visibility Settings

Like configurations, visibility settings may be changed outside of configuration, directly in the Percussion Workbench. In that case, you may want to reapply the configured visibility settings.

You can also use this capability to apply visibility settings developed in one server tier to another server tier. For example, if you define a set of visibility settings in your development tier, you can copy the visibility settings to the production tier. Reapplying the visibility settings updates the production tier with the visibility settings you defined in development.

To reapply visibility settings, check the box in the row of the package whose settings you want to reapply, then click the **[Reapply]** button and from the drop list, choose *Visibility Settings*. The server attempts to reapply the visibility settings and returns a message indicating whether the processing was successful.

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## Restoring Package Defaults

When configuring your package, you may decide that you want to restore the defaults and reconfigure. To restore the package defaults:

- 1** In the local configuration directory  
<CMServerRoot>/rxconfig/Packages/LocalConfigs, delete the local configuration file (<packagename>\_localConfig.xml).
- 2** Copy the default configuration file  
<CMServerRoot>/rxconfig/Packages/DefaultConfigs/<packagename>\_defaultConfig.xml and paste it to the local configuration directory.
- 3** Rename the file copied in Step 2 to <packagename>\_localConfig.xml and save it.

When you save the file, the server will update the configurations to match the newly copied local configuration file, but you should check the restored objects, such as sites and content types, in the Workbench or Content Explorer to confirm that you have restored your default configuration.



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## Uninstalling Packages

When you uninstall a package, the design objects included in that package are deleted from the system.

Note that if a package includes design objects that are in use, those design objects will not be deleted when you uninstall the package (other design objects will be deleted normally). The system will display a warning message informing you which design objects will not be deleted.

For example, if you want to uninstall a package that includes Workflow, but Content Items have been created and exist any of those Workflows, the Workflows will not be deleted. Similarly, if you want to uninstall a package that includes Content Types, but you have created Content Items of those Content Types, the Content Types will not be deleted.

To uninstall a package, check the box in the row of the package you want to delete, then click the [**Uninstall**] button. The system displays a confirmation dialog. Click [**OK**] to uninstall the package or [**Cancel**] to stop the uninstall action.

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## Upgrading Packages

Publishers may upgrade packages, either to enhance the package itself or to ensure compatibility with a new version of Percussion CM Server. (Note: It is the responsibility of the package publisher to ensure that the packages are compatible with new versions of Percussion CM Server. Contact your package vendor for information about the compatibility of their packages with new versions of Percussion CM Server.)

A package upgrade should include documentation describing any new or modified configurations.

To upgrade a package, install the upgraded package. During the upgrade, new or modified configurations are added to the default configurations file

(`<CMServerRoot>/rxconfig/Packages/DefaultConfigs/<packagename>_defaultConfig.xml`). Copy the new or modified configurations to the local configuration file

(`<CMServerRoot>/rxconfig/Packages/LocalConfigs/<packagename>_localConfig.xml`). Update the properties of the new configurations to match your requirements. The new configurations will take effect normally.

## CHAPTER 5

# Installing the Package Installer

The Package Installer is a tool in the Percussion Development Tools suite. If you need to install the Package Installer (for example, if you work on a machine remote from your Percussion CM Server), you can download and install the Development Tools suite from the server using the following URL:

```
http://server:port/Rhythmyx/Administration/DeveloperTools/install.htm
```

Where:

server is the name or IP address of the Rhythmyx server machine;

port is the port the Rhythmyx server listens on;

For example:

```
FastForward:9992/Rhythmyx/Administration/DeveloperTools/install.htm
```