

FatWire | Content Server 7

Version 7.0.2

Upgrading Content Server 6.3 Current Patch to Version 7.0.2

Document Revision Date: Jun. 15, 2011



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Document Revision Date: Jun. 15, 2011

Product Version: 7.0.2

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Chapter 1

Before You Upgrade

This guide provides instructions for upgrading your active Content Server installation from CS 6.3 current patch to CS 7.0.2.

Note

Anyone using this document requires experience installing and configuring Content Server, and J2EE components such as databases, web servers, application servers, and portal servers.

This chapter contains the following sections:

- [Planning](#)
- [Next Step](#)

Planning

This section describes the approach you should take when preparing to upgrade your active Content Server environment. Use it as a guide when planning the upgrade process.

Planning the Upgrade Process

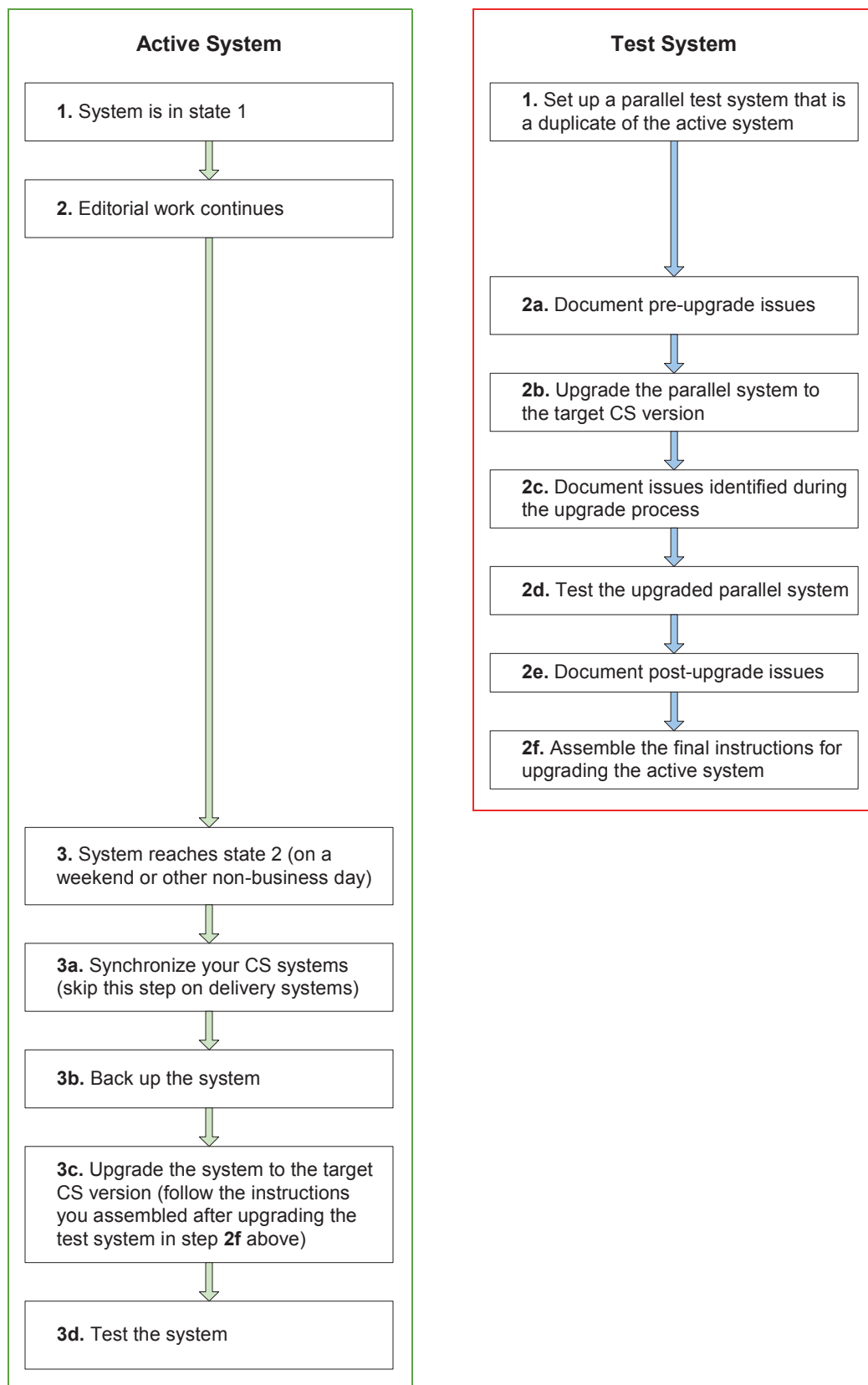
In a production environment, upgrades can potentially disrupt the operation of active systems and cause unnecessary downtime. FatWire highly recommends adopting the upgrade strategy outlined below when upgrading your Content Server systems to a new version.

Note

- In this guide, the term “active” denotes any development, management, and delivery system that is mission-critical (in other words, a system whose downtime would cause work to stop or the online site to go down).
- This guide provides instructions for upgrading active CS 6.3 installations on the current patch to CS 7.0.2.

Before you upgrade an active CS system, perform a test upgrade on a duplicate of the system running in parallel. The test upgrade allows you to identify and document any issues that are particular to your configuration and that fall outside of the scope of this guide, while the operation of the active system continues uninterrupted.

The upgrade strategy is outlined in [Figure 1](#), [on page 7](#) and explained in detail on [page 8](#).

Figure 1: Content Server upgrade strategy

The upgrade steps, outlined in [Figure 1, on page 7](#), are as follows:

1. **System is in state 1.** At a convenient point, called state 1 in our example, create a duplicate of the active system you want to upgrade. The duplicate (test) system will run in parallel to the active system. You will use the test system to perform a test upgrade before you upgrade the active system.
2. **Editorial work continues.** While editorial work continues as usual on the active system, perform a test upgrade on the duplicate system you have created in the previous step, as follows:
 - a. **Document pre-upgrade issues.** Read the rest of this guide to familiarize yourself with the steps required to upgrade a Content Server installation to version 7.0.2. Take note of any potential issues (such as database schema, custom tables, supporting software versions, and so on) you might need to correct before you begin the upgrade process.
 - b. **Upgrade the parallel system to the target CS version.** Follow the steps in [Chapter 2, “Upgrading Your Content Server Installation”](#) to upgrade Content Server on the duplicate system to version 7.0.2. If the system you are upgrading is a member of a cluster, follow the steps in [“Upgrading Clustered Installations,” on page 9](#) to ensure your cluster is upgraded successfully.
 - c. **Document issues identified during the upgrade process.** If there are any issues occurring during upgrading the test system to CS 7.0.2, document the steps necessary to fix them. You will follow these steps when upgrading the active system.
 - d. **Test the upgraded parallel system.** Once the duplicate system has been upgraded to CS 7.0.2, test the system to identify any potential post-upgrade problems.
 - e. **Document post-upgrade issues.** If you encounter any issues when you test the upgraded duplicate system, document the steps necessary to fix them. You will follow these steps after you upgrade the active system.
 - f. **Assemble the final instructions for upgrading the system.** Once you have verified that the duplicate system has been upgraded successfully and all issues have been ironed out, finalize the documentation for the upgrade process. (Make sure you refer to [Chapter 2, “Upgrading Your Content Server Installation”](#) when compiling your custom upgrade steps.) You will follow this documentation when upgrading the active system.
3. **System reaches state 2.** On a weekend, or another non-business day when no editorial work is being done, upgrade the active system as follows:
 - a. **Synchronize your CS systems.** (This step does not apply to upgrading delivery systems.) In order to ensure that changes made since state 1 that need to be published are published to the delivery system, do the following:
 - 1) Publish desired changes from the development system to the content management system.
 - 2) Publish desired changes from the content management system to the delivery system.
 - b. **Back up the system.** Create a full backup of the file system and CS database used by the system you are upgrading.

- c. **Upgrade the system to the target CS version.** Follow the upgrade steps you have compiled in [step 2f](#) to upgrade Content Server on the duplicate system to version 7.0.2.
 - d. **Test the system.** Once the system has been upgraded, test it to make sure it is operating as intended.
4. Repeat [steps 1–3](#) for each CS system that you want to upgrade to version 7.0.2.
5. Once all active systems have been upgraded and tested, synchronize your CS systems and resume editorial work on the next business day.

Upgrading Clustered Installations

Content Server clusters consist of a single primary member and one or more secondary members. All members of the cluster share a single shared storage directory and CS database. All cluster members must be running the same version of Content Server or the cluster will not function because of differences in the deployed `.jar` files.

Because of this, you must upgrade a clustered CS installation as follows:

1. Upgrade the primary cluster member by following the steps in this guide.
2. Undeploy the current CS installations on all secondary members and install the target version of Content Server on each secondary member. When installing Content Server on secondary cluster members, select the **Cluster Member** option in the “Clustering” screen of the CS installer.

Next Step

Continue to [Chapter 2, “Upgrading Your Content Server Installation.”](#)

Chapter 2

Upgrading Your Content Server Installation

This chapter contains the following sections:

- [Upgrade Steps](#)
 - A. [Prerequisites](#)
 - B. [Running the CS 7.0.2 Upgrade Installer](#)
 - C. [Completing the Upgrade](#)
 - D. [Next Step](#)
- [Final Step](#)

Upgrade Steps

This section describes the steps you will take to upgrade a CS 6.3 installation using the current patch to CS 7.0.2. You will complete the steps in this section for each CS system you want to upgrade, first on a test system, and then on the corresponding active system, as described in “[Planning the Upgrade Process](#),” on page 6.

Note

Refer to “[Planning the Upgrade Process](#),” on page 6 when performing a test upgrade on a test CS system and when assembling the final instructions for upgrading the corresponding active CS system.

To upgrade to CS 7.0.2, you will complete the following steps:

- A. [Prerequisites](#)
- B. [Running the CS 7.0.2 Upgrade Installer](#)
- C. [Completing the Upgrade](#)
- D. [Next Step](#)

A. Prerequisites

Before upgrading to version 7.0.2, do the following:

1. If you are running a version of Content Server earlier than 6.3 current patch, upgrade Content Server to 6.3 current patch and make sure your installation is functioning properly.
2. Back up your entire CS 6.3 current patch installation, including the Content Server file system and database, as follows:
 - Stop the application server before performing the backup.
 - Back up all components of the CS system (database, file system) at the same time. If you do not, the integrity of the backed up CS installation will be compromised.
3. If your CS 6.3 current patch installation is using a FatWire sample site as the foundation for your online site (that is, your online site uses the sample site’s asset types, templates, and other objects), be aware that the CS 7.0.2 installer will restore the sample site to its original state during the upgrade process; any sample site objects that you have modified or deleted will be recreated, which will render your online site inoperable.

To retain your site’s integrity

- a. Create a copy of the site using the Site Launcher utility, including all content assets, as described in Chapter 10, “Replicating CM Sites” in the *Content Server Administrator’s Guide*.

When you copy your site, the names of the replica and all objects that belong to it are appended with a prefix of your choice. The installer will not treat the prefixed objects as belonging to a sample site, and thus, will not recreate them.

- b. After you create a copy of your site, you must make it fully functional. Complete the steps in “Post-Replication Tasks and Guidelines” in Chapter 10, “Replicating CM Sites” in the *Content Server Administrator's Guide*.
 - c. Once the new site is fully functional, back up your entire installation again, including the Content Server file system and database.
4. Take note of all the information about your existing installation, such as web server configuration, application server configuration, database configuration, and LDAP configuration.
5. Read the *Release Notes*.

Note

Updates to release notes (and the product documentation set for Content Server) are available at the following URL:

<http://e-docs.fatwire.com>

The e-docs website is password-protected; if you do not have a password, you will need to obtain one from FatWire Technical Support.

For Technical Support contact information, see the following website:

http://www.fatwire.com/Support/contact_info.html

6. If necessary, upgrade Content Server's supporting software (operating system, application or portal server, Java SDK, database, and, optionally, LDAP server and web server). Refer to the *Supported Platforms Document* (available on the e-docs site) for the list of currently supported platforms.

Note

If you are using LDAP and decide to upgrade or change your LDAP server, you must manually migrate all of your LDAP data from the old server to the new one.

For instructions on upgrading supporting components, see the respective vendor's documentation. Following the upgrade, test your Content Server installation to ensure it is fully functional.

7. Create a clean `cs.war` file from your currently deployed CS application as follows:
 - a. Remove the `futuretense_cs` folder and all shared files. This is to ensure that the size of the CS application is within reasonable limits (30MB–200MB). The upgrade process will fail if the CS application file is unusually large.
 - b. If you have created your own `.jar` files, back them up. (In [step 4 on page 16](#) you will determine whether the files have been carried over during the upgrade.)
 - c. Use the clean `cs.war` to generate a `ContentServer.ear`.
 - d. Place the new `cs.war` and `ContentServer.ear` files into the `<cs_install_dir>/ominstallinfo/app` directory. The CS installer is configured to detect the CS application to be in this directory. If the installer cannot find the CS application, the upgrade process will fail.

8. Note the values of the following properties in `futuretense.ini` in the Content Server installation directory (using the Property Editor):
 - `secure.CatalogManager` (**Basic** tab)
 - `ft.sync` (**Cluster** tab)

(The installer will change their values during the upgrade process. You will need to restore them.)

9. If you coded templates with the `<insitetemplating:slot>` tag:
 - Replace `<insitetemplating:slot>` with `<insite:calltemplate>` in the JSP code. (Tag attributes are unchanged, as both tags pick up their data from the `Template_Composition` table.)
 - Depending on the template, the context that is active in version 7.0.2 (but ignored in version 6.3) may change site behavior. To fall back on v6.3 behavior, manually override the context (to an empty string value) in all `<insite:calltemplate>` tags, as follows:

Replace

```
<insitetemplating:slot site="<site_name>"
    tid="<template_id>" slotname="<slot_name>" />
```

with

```
<insite:calltemplate site="<site_name>"
    tid="<template_id>" slotname="<slot_name>" context="" />
```

Note

For information about the `context` attribute, see the *Content Server Developer's Guide*.

- Make sure that the `Template_CArgs` table is empty.
10. Disable revision tracking for all system tables, and the following asset types:
 - `CSElement`
 - `Template`
 - `SiteEntry`
 - `Page`
 - `Link`
 - `Query`
 - `Collection`

11. Undeploy the old CS application from the application server. Refer to the installation guide for your platform for instructions on undeploying applications.

Note

In Content Server 7.0.2, several changes are made to database schema.

- The following tables are added:

```
Asset Edit Pane
AssetListener_reg
AssetQueues
CSProjects
Dimension
DimensionSet
FlexAssetDef_reg
Global_Q
IndexSourceMetaDataConfig
LocaleTree
SeachEngineMetaDataConfig
SystemIdGenerator
UITag
UITagItem
UIUserLoggedInDetails
```

- For each table that is related to an asset type, two new tables are created with names ending in `_Dim` and `_DimP`. These tables support multilingual assets.
- Tables whose names end with `_Publish` now contain an `AssetID` column.
- Column `CS_ROLE` in table `OBJECTPRIVS` was changed from `VARCHAR2(255)` to `VARCHAR2(2000)`.

12. **Remote Satellite Servers.** When upgrading to Content Server 7.0.2, remove all of your old remote Satellite Server installations and deploy new ones using the Satellite Server installer. For instructions, see *Installing Satellite Server*.

13. Continue to “[B. Running the CS 7.0.2 Upgrade Installer](#).”

B. Running the CS 7.0.2 Upgrade Installer

In this section, you will upgrade your Content Server installation to version 7.0.2:

1. Ensure you have completed all steps in “[A. Prerequisites](#),” on page 12.

Note

Monitor the CS installer (`futuretense.txt`) and application server logs in real-time during the upgrade process and during post-upgrade testing. If a problem occurs, you can trace its source by reviewing the logs.

2. Extract the Content Server installer archive into a temporary directory and execute the installer script:

- On Windows: `csInstall.bat`
- On Unix: `./csInstall.sh`

Note

For the WebLogic application server platform, the installer will prompt you to either manually or automatically deploy Content Server. Select the manual option.

Be aware of the following when proceeding through the CS upgrade process:

- Previously installed FatWire components (such as Engage, sample sites, and sample data) will be automatically selected for upgrade to the latest version. You will not be allowed to deselect them. You will have the option to install FatWire components that are not already installed.
 - Most fields in the installer will be pre-populated with values that the installer detected for your original CS 6.3 installation (with the exception of information such as passwords, which you will have to enter manually). Check these values and if they are not current, supply the current values.
 - Fields whose values you are not permitted to change will be unavailable (greyed out).
 - The installer provides online help at each screen, with detailed explanations of the options that are presented in each screen. If you experience problems during the upgrade process, consult the online help for possible causes and solutions.
3. Half-way through the upgrade process, the installer displays the “Installation Actions” window with instructions for you to deploy and/or test the upgraded application. Do one of the following:
- **For customized installations.** If you are upgrading an installation that contained `.jar` files which you created, verify that the files were carried over during the upgrade. Complete [step 4](#).
 - **For installations with standard `.jar` files.** Complete the steps in the “Installation Actions” window, then follow up with “[C. Completing the Upgrade](#),” on [page 17](#).
4. **For customized installations.** If your pre-existing installation contained `.jar` files that you created, do one of the following:
- If Content Server will be manually deployed:
 - 1) The installer has created an exploded `cs` folder in the directory that you specified as the Content Server deployment directory. Verify that this folder contains your custom `.jar` files, from [step b on page 13](#). (The files are located in `cs/WEB-INF/lib`.) If the files are missing, add them and create a new `cs.war` file.
 - 2) Deploy `cs.war` with your custom `.jar` files using the command line or the console.
 - 3) Continue with the post-deployment steps in the “Installation Actions” window. (You will be asked to restart your application server.)

- If Content Server was automatically deployed:
 - 1) Verify that the new `cs.war` and `ContentServer.ear` files (in `ominstallinfo/app`) contain your `.jar` files. If they do not, add your custom `.jar` files, then undeploy `cs.war` and manually deploy your new `cs.war`.
 - 2) Continue with the post-deployment steps in the “Installation Actions” window. (You will be asked to restart your application server.)
- 5. If you wish to perform LDAP integration, do so now. If you wish to integrate with a supported flat schema LDAP server, run the LDAP integration program. If you wish to integrate with a hierarchical schema LDAP server, integrate manually. Instructions for both methods are given in the *LDAP Integration Guide*.
- 6. Continue to “[C. Completing the Upgrade](#)” to complete the upgrade process.

C. Completing the Upgrade

To complete the upgrade process, verify and finalize your installation:

1. Test your Content Server installation by logging in as a general administrator.
2. Open the `<cs_install_dir>/futuretense.ini` file and reset the `secure.CatalogManager` and `ft.sync` properties to their original values. (Use the Property Editor, `propeditor.bat` or `.sh`, to reset the values.)
3. (Optional) If you plan to use multilingual assets and locale filtering on a site, create a default locale and assign it to all the assets on the site. For instructions, see the *Content Server Developer's Guide*.

D. Next Step

Which step you take next depends on the stage of completion of your upgrade cycle:

- If you have just upgraded a test system, as instructed in [steps 2b](#) and [2c](#) in “[Planning the Upgrade Process](#),” on page 6, continue to [step 2d](#) of the upgrade process.
- If you have upgraded an active system and want to upgrade another system, repeat the process described in “[Planning the Upgrade Process](#),” on page 6 starting with [step 1](#).
- If you have upgraded the last active system in your Content Server environment, continue to “[Final Step](#)” below to complete the upgrade cycle.

Final Step

Once you have upgraded and tested all of your active CS systems, do the following:

1. Synchronize your CS systems:
 - a. Publish from the development system to the content management system.
 - b. Publish from the content management system to the delivery system.
2. Resume editorial work on the next business day.

