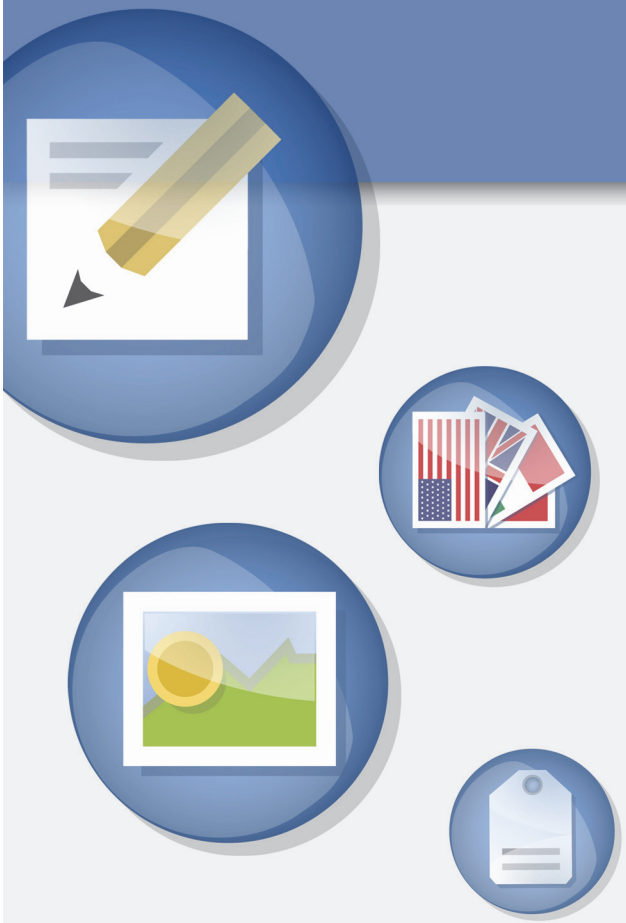
FatWire | Content Server 7

Version 7.5



Upgrading Content Server 7.0.2 to Version 7.5

Document Revision Date: Jun. 15, 2011

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Upgrading Content Server 7.0.2 to Version 7.5
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Chapter 1

Before You Upgrade

This guide contains information about upgrading FatWire Content Server environments from version 7.0.2 to version 7.5.

Before upgrading, read this chapter to gain an understanding of the strategy and prerequisites.

This chapter contains the following sections:

- Planning the Upgrade Process
- Prerequisites
- Guidelines for Upgrading Clustered Installations

Note

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

Planning the Upgrade Process

In a production environment, upgrades can potentially disrupt the operation of active systems and cause unnecessary downtime. To minimize such disruptions, FatWire highly recommends adopting the strategy outlined in this section when upgrading to a new version of FatWire Content Server.

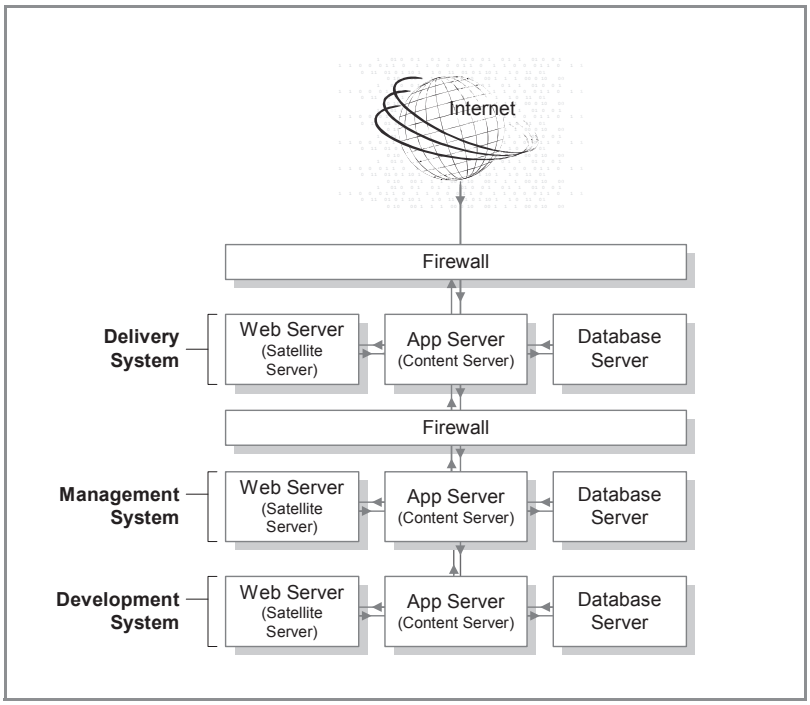
Note

This guide uses the term "active" to denote any development, management, or 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).

Upgrading a Test Environment

An enterprise-level environment typically consists of at least three different CS-powered systems: development, management, and delivery, as shown in Figure 1. Each system runs on its own database and at some point interacts with the other systems.

Figure 1: Content Server Environment



Before upgrading an active Content Server environment, it is best to perform a trial upgrade on a duplicate environment. The trial upgrade will help you detect and document system-specific issues (if any) and correct them in advance of the actual upgrade.

If a duplicate environment is not available, start by upgrading the development system in order to minimize interruptions to the management and delivery systems.

Prerequisites

This guide contains instructions for upgrading a Content Server 7.0.2 environment to version 7.5.

Note

- **If your current environment is running Content Server version prior to 7.0.2**, you must upgrade to version 7.0.2 before using this guide. For instructions and specifications, refer to the document *Upgrading Content Server to Version 7.0.2*. See also the CS 7.0.2 release notes and *Content Server Supported Platform Document.* All documents are available on the e-docs site at:

  `http://support.fatwire.com`

  (The site is password-protected. Login credentials are available from FatWire Technical Support.)
- **If your environment is clustered,** all cluster members must be upgraded to the same version of Content Server or the cluster will not function due to differences in the deployed `.jar` files.

Starting with a CS 7.0.2 environment, complete the following steps before upgrading to version 7.5:

1. Inform FatWire Technical Support about the pending upgrade. Also request information that may be relevant to your platform. Technical Support can be contacted during regular business hours.
2. Download the *Content Server 7.5 Supported Platform Document*, release notes, and and *Content Server Backup and Recovery Guide*, available on the e-docs site at: `http://support.fatwire.com`
3. Read the rest of this guide to familiarize yourself with the steps that are required to upgrade Content Server systems to version 7.5. Take note of any potential issues, including the following:
   - **Unsupported third-party software**
   - **Custom tables**
   - **Changes in CS 7.5**
     - **New tables in CS 7.5:**

       `FW_PUBLISHINGEVENTREGISTRY`
       `FW_PUBHISTORY`
       `FW_PUBDATASTORE`
       `FW_MSGBUS`
       `FW_PUBPROGRESS`
       `FW_PUBTARGET_APPROVALROLES`
       `FW_PUBTARGET_PUBLISHROLES`
       `FW_ATTRIBUTERENDERERCONFIG`
     - **New columns added to existing tables** (during upgrades, the installer modifies the schema of existing tables and adds values to the new columns).

       Column `FW_UID` was added to all asset type tables and some of the non-asset type tables (created by Content Server). The column is created empty.

- **Other schema changes**

  Column `MULTIVALUED` was added to table `ASSOCNAMED`

  Column `dtype` was added to table `DeliveryType`

  Column `cs_previewasset` was added to table `PUBLICATION`

  Columns `cs_status`, `cs_type`, `cs_logdate` added to `PUBMESSAGE`

  Columns `cs_enddate`, `cs_logfile` was added to table `PUBSESSION`

  Column `cs_tname` in table `CSELEMENT_COMPOSITION` was changed from `varchar 32` to `varchar 64`

  Column `cs_tname` in table `TEMPLATE_COMPOSITION` was changed from `varchar 32` to `varchar 64`

  Column `cs_tname` in table `TEMPLATE_TNAME`

- **Custom elements**

  During the upgrade, all elements in the `AssetStubElementCatalog` table will be overwritten with native CS 7.5 code.

- **Customized Advanced interface elements**

  During the upgrade, customized interface elements will be overwritten with native CS 7.5 code.

4. Have a copy of this guide handy throughout the upgrade procedure and be prepared to take notes. As you proceed through the upgrade, you will need to record certain information for future use in the upgrade procedure. You may also have to add or modify steps, depending on their relevance to the CS instances in your environment. Document all issues that might arise on a given CS instance, and note the steps you take to correct them. You will follow these steps when upgrading other instances.

Guidelines for 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 due to differences in the deployed `.jar` files.

To upgrade a Content Server 7.0.2 cluster, you will **upgrade** the primary member to version 7.5, and **install** CS 7.5 on all the secondary members, using the steps in this section as a guideline.

Note

Throughout the upgrade, ensure that all customization is maintained in `ini` files, custom `jar` files, `web.xml`, property files, web application-specific files, and all other files that may have been adjusted to your environment.

1. Back up and shut down all CS instances in the cluster.
2. Undeploy the current CS application on all secondary members.
3. Upgrade the primary cluster member.
4. Install Content Server 7.5 on each secondary member.

Chapter 2

Upgrading a Content Server 7.0.2 Environment to Version 7.5

- Upgrading the Content Server Environment
- Upgrading the Active Environment (for users who upgraded a test environment)

Upgrading the Content Server Environment

This section contains instructions for upgrading a CS 7.0.2 test environment to version 7.5, verifying the test environment, then upgrading the active environment.

Note

- If a test environment is not available, apply the steps in this section to the active environment.
- Before starting the steps in this section, ensure that you have read Chapter 1, "Before You Upgrade" and verified the following:
  - All prerequisites, on page 7, are satisfied.
  - If your environment is clustered, "Guidelines for Upgrading Clustered Installations," on page 8 are taken into account.
- In a non-clustered environment, you will complete the steps below for each Content Server instance on each system that you need to upgrade. (In a clustered environment, you will upgrade only the primary member of each system and install CS 7.5 on all the secondary members.)
- For CS environments running on the Oracle database, the user must have a role other than `DBA`.

Step 1. Back Up Your 7.0.2 Environment
Step 2. (Recommended) Create the Test Environment
Step 3. Prepare CS 7.0.2 for Upgrade
Step 4. Upgrade Content Server Instances to Version 7.5
Step 5. Run the Upgrade Utility
Step 6. Complete the CS Upgrade
Step 7. Upgrade Remote Satellite Servers in the Environment
Step 8. Verify the Upgraded Environment

Step 1. Back Up Your 7.0.2 Environment

In this section, you will back up your active environment as a precaution (and if you choose to create a test environment, you will do so by recovering the backup).

To back up your environment

1. Review the *Content Server Backup Guide* for guidelines and specific instructions.
2. Synchronize all systems in the active environment by publishing the content of one system to another, as necessary (for example, from development to management to the delivery system).
3. Disable all publishing schedules and ensure that no publishing sessions are running. You will re-enable the publishing schedules once the active environment has been upgraded and verified.

4. Take note of customized elements:
   a. For each basic asset type, take note of any custom code in the elements (in the `ElementCatalog` table).
   b. If you have customized any portion of the CS Advanced interface, take note of the custom code.
5. Back up all systems in the active environment, as follows:
   a. Stop the application server(s) before performing the backup.
   b. Back up all components of the CS environment (database, shared file system, and cluster members) at the same time.
   c. Back up all remote Satellite Servers.
6. Take note of all the information about your existing installation, such as web server configuration, application server configuration, database configuration, and LDAP configuration.

Step 2. (Recommended) Create the Test Environment

Note

Whenever possible, complete a trial upgrade on a test environment before upgrading the active environment. If a test environment is not available, start by upgrading the development system. For instructions, skip to "Step 3. Prepare CS 7.0.2 for Upgrade."

1. When you are ready to create the test environment, recover the backup that you created in the previous step. Refer to the *Content Server Backup Guide* for recovery guidelines.
2. If your active environment is running remote Satellite Servers, be sure to duplicate at least one of them in the test environment.
3. Continue with the guidelines below to complete the test environment:
   - Content Server
     1) Copy Content Server into the same location that it occupied on its previous host.
     2) Clear out `SystemSatellite` table entries.
     3) Change the host name and IP address in the following files (located in your `ContentServer.ear` and `cs.war` files):

Change host name and IP	File	Directory
Required	`satellite.properties` (host)	`<deploy_dir>/WEB-INF/classes`
Optional	`SampleSites.html`	`<deploy_dir>/Xcelerate`

Change host name and IP	File	Directory

Optional	`AssetSet.wsdl`
	`AssetType.wsdl`
	`Asset.wsdl`
	`Miscellaneous.wsdl`
	`SitePlan.wsdl`
		`<deploy_dir>/Xcelerate/wsdl`

4) Change the host name and IP address in the following property files in `<cs_install_dir>`:

Change host name and IP	Property File	Property

Required	`futuretense.ini`
	`databaseloader.ini`
	`futuretense_xcel.ini`
		`cs.eventhost`
		`db1.loginurl`
		`xcelerate.batchhost`

- Application server
  1) Install the application server, using the same paths that were used on the previous host.
  2) Create the data source using the same jndi name that was used on the previous host. Use the database information for the restored database.
  3) Deploy the Content Server application as required by your application server.

Step 3. Prepare CS 7.0.2 for Upgrade

In this section you will use the *Content Server 7.5 Supported Platform Document* and current release notes to first upgrade Content Server's supporting software.

A. Preparing the Environment

Reminder

For clustered environments. Stop all cluster members. Prepare only the primary member for upgrade. When you finish upgrading the primary member, you will install CS 7.5 on the secondary members.

1. Upgrade Content Server's supporting components to the versions that are listed in the *CS 7.5 Supported Platform Document*. Supporting software includes:
   - The operating system
   - Application server or portal server
   - Java SDK
   - Content Server's database

- (Conditional). LDAP server and web server. If you are using LDAP and you decided to upgrade (or change) the LDAP server, manually migrate all of your LDAP data from the old server to the new one.

Notes

For instructions on upgrading supporting components, see the respective vendor's documentation.

2. Verify that your installation is fully functional.

B. Preparing Content Server Instances

1. If Content Server is running with Oracle:
   a. Assign the `Resource` role to the user of each Oracle database.
   b. Assign the following system privileges to the Oracle database user: **CREATE VIEW** and **SELECT ANY DICTIONARY** (the privileges appear in the "Selected System Privileges" list).
2. Maintaining customizations throughout the upgrade.

Note

In this step you will back up deployment customizations (if any), as the `js/src` folder in your deployment directory will be removed during the upgrade.

If you have deployed custom jars or made configuration changes which are not reflected in the current copies of `cs.war` and `ContentServer.ear` (located in `<cs_install_dir>/ominstallinfo/apps`), create clean `cs.war` and `ContentServer.ear` files from your currently deployed CS application as follows:

a. Back up `cs.war` and `ContentServer.ear`.
b. Explode the `ContentServer.ear` file into its own directory.
c. Explode the enclosed `cs.war` each into its own directory and continue as follows:
   1) If you created your own `.jar` files, add them to the exploded `cs.war`.
   2) If you customized any property files in the `WEB-INF/classes` directory, copy them to the corresponding directory.
   3) Copy custom `.jar` files into the corresponding directory.
d. After making changes to the exploded `cs.war`, compress the changes using the copy of `jar` that comes with the JDK that your application server is using.
e. Using the newly created `cs.war` (from the previous step), create a new `ContentServer.ear` file. Make sure to use the copy of `jar` that comes with the JDK being used by your application server.

f. Place the new `cs.war` and `ContentServer.ear` files into the `<cs_install_dir>/ominstallinfo/app` directory.

> **Note**
>
> The CS installer is configured to detect the CS application to be in the `<cs_install_dir>/ominstallinfo/app` directory. Neither `cs.war` nor `ContentServer.ear` files must be renamed or moved. If the installer cannot find the CS application, the upgrade process will fail.

3. Back up all `.ini` files (in `<cs_install_dir>`).
4. Using the Property Editor, note the values of the following properties in `futuretense.ini`:
   - `secure.CatalogManager` (**Basic** tab)
   - `ft.sync` (**Cluster** tab)

   The installer will change their values during the upgrade process. You will need to restore them.
5. Disable revision tracking for the following asset types:
   - `ASSOCNAMED` table
   - `CSElement`
   - `Template`
6. If your system is integrated with read-only LDAP, add the following roles (new in CS 7.5) for each CS user:
   - `AdvancedUser`: Allows users to log in to the Advanced interface
   - `DashUser`: Allows users to log in to the Dash interface
7. Run the CS 7.5 upgrade utility to log the pre-upgrade status of the database schema.You will run this utility, again, after the upgrade to determine which changes were made to the database schema (and indexes) by the upgrade installer. For more information about the upgrade utility, refer to the `ReadMe` file located in `Misc\UpgradeUtility\upgrade-util.zip`.
   a. Go to the directory to which you downloaded the `Misc` folder (and `ContentServer7.5.zip`), and open one of the following scripts:

   Windows: `cssystem.bat` (in `Misc\UpgradeUtility\upgrade-util.zip`)

   Unix/Linux: `./csssytem.sh` (in `\Misc\UpgradeUtility\upgrade-util.zip`)

   b. Edit the selected script by entering the following information about your system:
   - Specify CS database settings: driver, URL, user name/password.
   - Specify the `DATABASEJAR` file relevant to your database type.
   - Specify the expected CS deployment path, using the `-i` parameter.

c. Run the selected script.

Running the script generates the following files (in `\Misc\UpgradeUtility`):

- `Systeminfo.log`, which contains the expected CS 7.5 database schema updates.
- `indexinfo.sql`, which contains indexes specific to CS 7.5.

Note

For more information about the usage of the upgrade utility, refer to `ReadMe.txt` (in `\Misc\UpgradeUtility\upgrade-util.zip`).

8. Undeploy the old CS application from the application server. For undeployment instructions, refer to the installation guide for your platform and Content Server version.
9. For Content Server upgrades on Sun Application Server and Sun Java Enterprise Server, transactions must be manually turned off prior to upgrade by setting the **`runTransCode`** parameter to `false` (in the Sun Admin UI):

   `-DrunTransCode=false`

Note

Do not skip this step (otherwise the installer will fail).

`-DrunTransCode=false` can be removed after the upgrade is completed. You will be reminded in step 9 on page 20.

10. If your original installation precedes version 7.0.2 and the Lucene directory is missing from the Shared folder, create it now.
11. Set `secure.CatalogManager` in `futuretense.ini` to `false`. (The `futuretense.ini` file is in the Content Server installation directory.)

Step 4. Upgrade Content Server Instances to Version 7.5

Note

- If you made major changes in "Step 3. Prepare CS 7.0.2 for Upgrade," back up your environment. Otherwise, if the upgrade fails, you will need to restart the upgrade procedure from Step 1.
- In the steps below, you will run the CS 7.5 upgrade installer. As a reminder, previously installed FatWire components (such as Engage, sample sites, and sample data) will be automatically selected for upgrade to the latest version. They cannot be deselected. You will have the option to install FatWire components that are not already installed.

Run the CS 7.5 Upgrade Installer on Each CS Instance

1. Stop the application server.
2. Extract the CS 7.5 installer archive into a temporary directory and execute the installer script:
   a. On Windows: `csinstall.bat`
   b. On Unix: `./csInstall.sh`

Notes

- Monitor the installer log (`futuretense.txt`) and application server logs during the upgrade process and during post-upgrade testing. If a problem occurs, you can trace its source by reviewing the logs.
- For the WebLogic application server platform: When the installer prompts you to either manually or automatically deploy Content Server, select the manual option.

3. As you proceed through the upgrade, bear in mind the following:
   - Most fields in the installer will be pre-populated with values that the installer detected from your original installation. Check the pre-populated values. If they are outdated, you will need to supply the current values. (Information such as passwords, you will have to enter manually.)
   - Fields whose values you are not permitted to change will be disabled (grayed out).
   - The installer provides online help at each screen, with detailed explanations of options in the screen. If you experience problems during the upgrade process, consult the online help for possible causes and solutions.
4. 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 the following:
   a. If you are upgrading an installation that contained custom `.jar` files, where properties were created or modified, verify that the files exist in the `cs.war` and `ContentServer.ear` files that you created in step 2 on page 15 ("B. Preparing Content Server Instances").
   b. Depending on the Content Server deployment method, complete one of the following steps:
      - If Content Server was automatically deployed (TomCat, JBoss platforms), restart your application server.
      - If Content Server was manually deployed (WebSphere, Sun JES, Oracle Application Server, and WebLogic with manual deployment selected), do the following:
        1) Deploy `cs.war` using the command line (or the console).
        2) For WebLogic and WebSphere platforms, ensure that `priority=1` is the first line in `commons-logging.properties` (otherwise, `futuretense.txt` will not be populated).
        3) Restart your application server.

5. Click **Test** in the "Installation Actions" dialog box to test your CS installation, and do one of the following, depending on the test results:
   - If all the tests were successful, close the test results dialog and click **OK**.
   - If any one of the tests failed, refer to the chapter "Installing Content Server," in the installation guide for your platform for possible causes and solutions.

> **Caution!**
>
> If all tests were successful, the database upgrade begins. **If the upgrade fails**, review the logs, **keep the installer running**, and contact FatWire Technical Support. **Do not exit the installer unless instructed to do so.**

6. In the "Installation Successful" pop-up dialog, click **OK**.
7. Restart the application server.
8. Continue to "Step 5. Run the Upgrade Utility."

Step 5. Run the Upgrade Utility

In this section, you will re-run the upgrade utility to ensure the database schema has been correctly deployed.

1. Re-run one of the following scripts, (which you configured and executed in step 7 on page 16, when you prepared CS 7.0.2 instances for upgrade):
   - Windows: `cssystem.bat`
   - Unix: *`csssytem.sh`*
2. Running the upgrade utility generates an updated `systeminfo.log` file. Compare this file to the `systeminfo.log` file that was generated in step 7 on page 16 to ensure that the expected database schema changes were made.
3. Execute the queries inside the `indexinfo.sql` (generated in step 7 on page 16) on the CS host to ensure that database table indexes have been correctly deployed.

Step 6. Complete the CS Upgrade

1. Using the Property Editor, open `futuretense.ini` (in `<cs_install_dir>`) and reset the `secure.CatalogManager` and `ft.sync properties` to their original values.
2. Restart the application server.
3. Ensure you can log in to Content Server as the general administrator.
4. If you wish to use the search engine, you must enable it (the search engine is stopped during the upgrade).
   a. To enable the search engine, follow instructions in the *Content Server Administrator's Guide 7.5* ("Configuring the Lucene Search Engine").
   b. Re-create the search indices. (This step fully enables the newly added Site Preview feature, which requires start/end dates to be set in the "Metadata" tab of any assets that are time-sensitive.)

5. If you plan to use multilingual assets and locale filtering on any site, create a default locale and assign it to all the assets on the site. For instructions, see the *Content Server Developer's Guide*.
6. If you manually created attribute editors in your original installation by copying `xml` files belonging to FirstSite II (for example, `DATEPICKER.xml`), manually copy the same `xml` files to the upgraded instances. (The installer does not install these files.)
7. For each basic asset type, re-register asset elements:
   a. Log in to the Content Server site for which basic assets are enabled.
   b. In the left side navigation tree, select the **Admin** tab.
   c. Expand the **Asset Types** node.
   d. Double-click **Basic asset type**.
   e. In the right-hand pane, click **Register Asset Elements**.
   f. On the confirmation screen, click **Register Asset Elements**.
   g. For each basic asset type, re-apply the customization to each element in the `ElementCatalog` table.
8. If you have customized any portion of the CS Advanced interface, re-apply the custom code.
9. For Content Server upgrades on Sun Application Server and Sun Java Enterprise Server, delete transactions (remove **`-DrunTransCode=false`**).
10. New properties are added during the upgrade. If you wish to change their values, see the *Content Server 7.5 Property Files Reference*. The properties are listed below:

Property File	Property
`futuretense.ini`	`bs.invalidheadernames`
`uiadmin.properties`	`cs.batchtimeout`
`futuretense.ini`	`cs.sitepreview`
`futuretense_xcel.ini`	`xcelerate.searchResultCols`
`uiadmin.properties`	`searchtableattrcols`
`uiadmin.properties`	`searchtablerowcount`
`uiadmin.properties`	`popupsearchtablerowcount`
`uiadmin.properties`	`sitestablerowcount`
`uiadmin.properties`	`searchresultscount`
`uiadmin.properties`	`cascadedmaxitems`

11. Assemble any notes that you might have taken while completing the previous steps.

Step 7. Upgrade Remote Satellite Servers in the Environment

1. After upgrading to Content Server 7.5, remove all of the old remote Satellite Server installations and deploy new ones using the Satellite Server installer. For instructions, see *Installing Satellite Server*.
2. Assemble any notes that you might have taken regarding the upgrade of remote Satellite Server.
3. At this point, you are ready to verify the upgraded environment. Continue to the next section, "Step 8. Verify the Upgraded Environment."

Step 8. Verify the Upgraded Environment

- Non-Clustered
- Clustered

Non-Clustered

Complete the following steps on each Content Server instance in the upgraded environment:

1. Log in to Content Server as the general administrator.
2. Test the interfaces and all functions that are routinely used during normal operations. For example: search function, creating/editing custom asset types, creating/editing assets, InSite editing, Site Preview, workflow, and approval/publishing.
3. When the environment is verified, do one of the following:
   - If you upgraded the test environment, continue to "Upgrading the Active Environment (for users who upgraded a test environment)."
   - If you upgraded the active environment, do the following:
     1) Enable the publishing schedules.
     2) Back up the upgraded environment.
     3) Resume work.

Clustered

1. Verify the primary cluster member:
   a. Log in to Content Server as the general administrator.
   b. Test the interfaces and all functions that are routinely used during normal operations. For example: search function, creating/editing custom asset types, creating/editing assets, InSite editing, Site Preview, workflow, and approval/publishing.

2. Once the primary cluster member passes verification, its upgrade is complete. Install Content Server 7.5 on all secondary members and verify the results.

Note

- Ensure that all customization is maintained in `ini` files, custom `jar` files, `web.xml`, property files, web application-specific files, and all other files that may have been adjusted to your environment.
- When installing CS 7.5 on secondary cluster members, be sure to select the **Cluster Member** option in the "Clustering" screen of the CS installer.

3. When the environment is verified, do one of the following:
   - If you upgraded the test environment, continue to the next section, "Upgrading the Active Environment (for users who upgraded a test environment)."
   - If you upgraded the active environment, do the following:
     1) Enable the publishing schedules.
     2) Back up the upgraded environment.
     3) Resume work.

Upgrading the Active Environment *(for users who upgraded a test environment)*

1. Having verified the test environment, you will now upgrade the active environment:
   a. Assuming the active environment continued to operate during the trial upgrade, synchronize its CS systems (as necessary):
      1) Publish from the development system to the content management system.
      2) Publish from the content management system to the delivery system.
   b. Upgrade the active environment, referring to the previous steps in this chapter and any notes that you may have created during the trial upgrade.
2. Verify the upgraded environment.
3. Enable the publishing schedules.
4. Back up the upgraded environment.
5. Resume work.