Content Server

Version: 7.0

Guidelines for Upgrading to Version 7.0

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Upgrading Content Server 6.3.5 to 7.0

This document provides instructions for upgrading your Content Server installation from version 6.3 patch 5 to version 7.0.

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:

- Before Upgrading
- Upgrade Steps
- Post-Upgrade Steps

Before Upgrading

This section lists important information about the upgrade process. Read it carefully before upgrading.

Best Practices

FatWire recommends that you follow these best practices when upgrading:

- Do not upgrade clusters. Delete the old cluster installations and replace them with new ones for best performance.
- Do not upgrade production environments. Upgrade only the development site, then publish to a new Content Server 7.0 production installation.

Prerequisites

Before upgrading Content Server to version 7.0, do the following:

- 1. If you are running a version of Content Server earlier than 6.3 patch 5, upgrade Content Server to version 6.3 patch 5 and make sure your installation is functioning properly. For instructions, see *Guidelines for Upgrading to v6.3*.
- **2.** Back up your entire installation, including the Content Server file system and database.
- **3.** Take note of all the information about your existing installation, such as web server configuration, application server configuration, database configuration, and LDAP configuration.
- 4. Read the *Release Notes* (included on the Content Server installation CD).

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

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

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.

- 6. 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 10, 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.
- 7. 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.)

- 8. 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 (but ignored in version 6.3) may change site behavior. In order 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.
- 9. Disable revision tracking for all system tables, and the following asset types:
 - CSElement
 - Template
 - SiteEntry
 - Page
 - Link
 - Query
 - Collection

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

Note

- **Database Schema.** In Content Server 7.0, several changes were made to database schema:
 - The following tables are added for each flex family (regardless of whether it is user-defined or created by Content Server for its system flex assets):

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

- For each of the tables above, two new tables are also 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).
- **Remote Satellite Servers.** When upgrading to Content Server 7.0 from 6.3.5:
 - Upgrade all remote Satellite Servers to use the new .jar files.
 - Make sure that Satellite Servers installed on application servers are using JDK 1.5.

To upgrade remote Satellite Server installations, we recommend removing the old installations and creating new ones. For instructions, see *Installing Satellite Server*.

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Upgrade Steps

Complete the following steps to upgrade your CS 6.3.5 installation to CS 7.0:

1. Make sure you have completed prerequisite steps in the section "Before Upgrading," on page 6.

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.

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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.

Note

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 "Post-Upgrade Steps," on page 11.

- **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 7. (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.
 - 4) When the upgrade process completes successfully, follow up with "Post-Upgrade Steps," on page 11.
 - If Content Server was automatically deployed:
 - 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.
 - **3)** When the upgrade process completes successfully, follow up with "Post-Upgrade Steps," on page 11.

Post-Upgrade Steps

When the upgrade process completes successfully, verify and finalize your installation:

- 1. Test your installation by logging in as the 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 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*.
- **4.** (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*.

