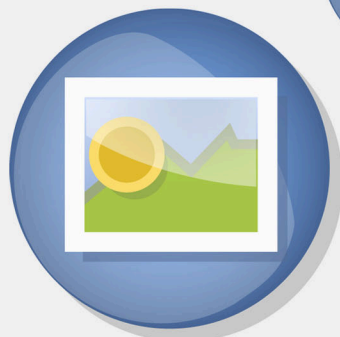


# FatWire | Content Server 7

Version 7.0.1

## Upgrading Content Server to Version 7.0.1

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*Upgrading Content Server to Version 7.0.1*

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# Upgrading Content Server 6.3.6 and 7.0 to 7.0.1

This document provides instructions for upgrading your Content Server installation from versions 6.3 patch 6 and 7.0 to version 7.0.1.

## 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 7.0.1 production installation.

### Prerequisites

Before upgrading Content Server to version 7.0.1, do the following:

1. **CS 6.x installations.** If you are running a version of Content Server earlier than 6.3 patch 6, upgrade Content Server to version 6.3 patch 6 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. If one or more of your sites has been developed on top of a FatWire sample site (for example, FirstSite II), we highly recommend that you create a copy of the site using Site Launcher, then make the copy fully functional before upgrading Content Server to version 7.0.1. The Content Server installer overwrites sample site components with new versions during the upgrade process, which will render your original site inoperable. For instructions on using Site Launcher, see the *Content Server Administrator's Guide*.
5. 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](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 11](#), 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 7.0.1 (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.

**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. Refer to the installation guide for your platform for instructions on undeploying applications.

### Note

- **Database Schema.** In Content Server 7.0.1, 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 7.0.1 from 6.3.6:
  - 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*.

## Upgrade Steps

Complete the following steps to upgrade your CS 6.3.6 or CS 7.0 installation to CS 7.0.1:

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.

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 12](#).

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 12](#).
  - 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.
    - 3) When the upgrade process completes successfully, follow up with “[Post-Upgrade Steps](#),” on [page 12](#).

## 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. If you have upgraded from CS 7.0, you must delete all Lucene asset indexes and re-index all of your assets for the search feature in the Dash interface to work. This is required because CS 7.0.1 uses asset type ID values when indexing assets, whereas CS 7.0 did not.
5. If you are using the “Convert to HTML” Keyview filter to convert documents to HTML format, and you plan to use templates other than the default ones, you must manually set the value of the `inidir` parameter in the `futuretense_xcel.ini` property file to the desired template.
6. (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*.