

# FatWire | Content Server 7

Version 7.0.3

## Upgrading Content Server to Version 7.0.3

**Document Revision Date:** Nov. 5, 2007



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*Upgrading Content Server to Version 7.0.3*

Document Revision Date: Nov. 5, 2007

Product Version: 7.0.3

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# Upgrading Content Server 6.3.7 and 7.0.x to 7.0.3

This guide provides instructions for upgrading your active Content Server installation from versions 6.3 patch 7 and 7.0.x to version 7.0.3.

## 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 You Upgrade](#)
- [Upgrading a Content Server Installation](#)
- [Final Step](#)

## Before You Upgrade

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.

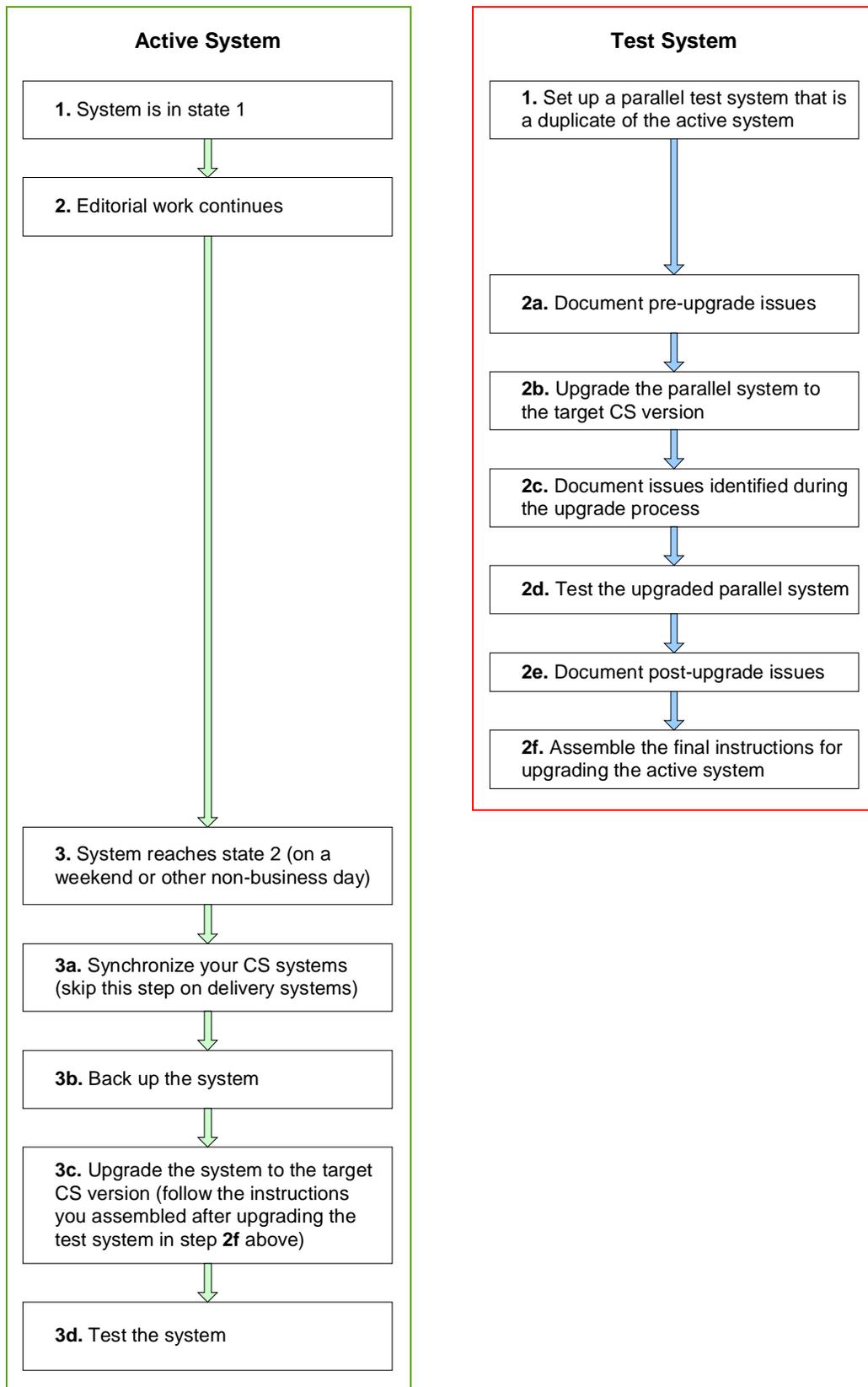
#### Note

- 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 6.3.7 and 7.0.x installations to CS 7.0.3. For instructions on updating new CS 7.0.2 installations to version 7.0.3, see *Installing Content Server 7.0.3*.

Before you upgrade a 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 7.0.3. 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 [“Upgrading a Content Server Installation,” on page 10](#) to upgrade Content Server on the duplicate system to version 7.0.3. If the system you are upgrading is a member of a cluster, follow the steps in [“How to Upgrade 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 7.0.3, 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 7.0.3, 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 [“Upgrading a Content Server Installation,” on page 10](#) 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.



# Upgrading a Content Server Installation

This section describes the steps necessary to upgrade a Content Server 6.3.7 or 7.0.x installation to version 7.0.3. 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 this section when performing a test upgrade on a test CS system and when assembling the final instructions for upgrading the corresponding active CS system.

If you are upgrading from Content Server 6.3.7, 7.0.0, or 7.0.1, complete the steps in the following sections:

- [A. Prerequisites](#)
- [B. Running the CS 7.0.2 Upgrade Installer](#)
- [C. Running the CS 7.0.3 Patch Installer](#)
- [D. Completing the Upgrade](#)
- [E. Next Step](#)

If you are upgrading from Content Server 7.0.2, complete the steps in the following sections:

- [A. Prerequisites](#)
- [C. Running the CS 7.0.3 Patch Installer](#)
- [D. Completing the Upgrade](#)
- [E. Next Step](#)

## A. Prerequisites

Before upgrading Content Server to version 7.0.3, do the following:

1. **CS 6.x installations.** If you are running a version of Content Server earlier than 6.3 patch 7, upgrade Content Server to version 6.3 patch 7 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, 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. **CS 6.x, CS 7.0.0, and CS 7.0.1 installations.** If you are using a FatWire sample site as the foundation for your online site (that is, your online site uses the asset types, templates, and other objects that are part of a sample site), be aware that the CS 7.0.2 installer will restore the sample site to its original state during the upgrade process. This means that 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, 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.

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*.

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](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 15](#) and/or in [step 16 on page 18](#) 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 7.0.3 (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. Do one of the following:**

- If your base CS version is 6.3.7, 7.0.0, or 7.0.1, proceed to [step 12](#) below.
- If your base CS version is 7.0.2, consider whether LDAP integration is required. If you need to perform LDAP integration, do so now, as LDAP integration must be completed before the CS 7.0.3 patch is installed.
  - 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*. When LDAP integration is complete, proceed to [step 12](#) below.

**12. 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 were made to database schema:

- The following tables are added (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)`.

**13. Remote Satellite Servers.** When upgrading to Content Server 7.0.3 from an earlier version, remove all of your old remote Satellite Server installations and deploy new ones using the Satellite Server installer. For instructions, see *Installing Satellite Server*.

14. Do one of the following:

- If your base CS version is 6.3.7, 7.0.0, or 7.0.1, proceed to “[B. Running the CS 7.0.2 Upgrade Installer](#)” below.
- If your base CS version is 7.0.2, proceed to “[C. Running the CS 7.0.3 Patch Installer](#),” on page 16.

## B. Running the CS 7.0.2 Upgrade Installer

In this section, you will upgrade your Content Server installation to version 7.0.2. (In the next section, “[C. Running the CS 7.0.3 Patch Installer](#),” on page 16, you will update your upgraded CS 7.0.2 installation to version 7.0.3.)

### Note

If your base CS version is 7.0.2, skip this section and proceed directly to “[C. Running the CS 7.0.3 Patch Installer](#),” on page 16.

Complete the following steps to upgrade a CS 6.3.7, CS 7.0.0, or CS 7.0.1 installation to version 7.0.2:

1. Make sure you have completed prerequisite steps in the section “[Before You Upgrade](#),” 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 “[D. Completing the Upgrade](#),” on [page 19](#).

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 11](#). (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.)
    - 4) When the upgrade process completes successfully, continue to “[C. Running the CS 7.0.3 Patch Installer](#),” on [page 16](#) to install the CS 7.0.3 patch.
  - 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.)
    - 3) When the upgrade process completes successfully, continue to “[C. Running the CS 7.0.3 Patch Installer](#),” on [page 16](#) to install the CS 7.0.3 patch.

5. (Optional) 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*.

#### Note

If you need to perform LDAP integration, you must do so **before** installing the CS 7.0.3 patch.

## C. Running the CS 7.0.3 Patch Installer

To update your CS 7.0.2 installation to version 7.0.3, complete the following steps:

#### Note

- The steps in this section apply only to updating an active CS 7.0.2 system to CS 7.0.3.
- If you need to perform LDAP integration, you must do so **before** installing the CS 7.0.3 patch.
- If you try to install the CS 7.0.3 patch on a version of Content Server other than 7.0.2, the patch installer will display an error message and you will not be allowed to proceed with the installation.

1. Before running the CS 7.0.3 patch installer, make sure that your active CS installation is running CS 7.0.2:
  - If your base Content Server version is 6.3.7, 7.0.0, or 7.0.1, make sure you have completed the steps in:
    - 1) [“Before You Upgrade,” on page 6](#)
    - 2) [“A. Prerequisites,” on page 10](#)
    - 3) [“B. Running the CS 7.0.2 Upgrade Installer,” on page 14](#)
  - If your base Content Server version is an active installation of 7.0.2, make sure you have completed the steps in:
    - 1) [“Before You Upgrade,” on page 6](#)
    - 2) [“A. Prerequisites,” on page 10](#)
2. Set `secure.CatalogManager` in `futuretense.ini` to `false`. (The `futuretense.ini` file is in the Content Server installation directory.)
3. Stop your application server.

4. Extract the CS 7.0.3 patch installer archive into a temporary directory and execute the installer script:
  - On Windows: `csrollupinstall.bat`
  - On Unix: `./csrollupinstall.sh`

#### Note

Monitor the patch 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.

5. In the “Welcome” screen, click **Next**.
6. In the “License Agreement” screen, select the **I accept** radio button, then click **Next**.
7. In the “Installation Directory” screen, enter the absolute path to the directory in which your CS 7.0.2 installation resides, then click **Next**.
8. In the “Select Products to Install” screen, make sure the **Content Server Applications Patch v7.0.3** check box is selected and click **Next**.
9. In the “Select Operation” screen, click **Next**.
10. In the “Cluster Configuration” screen, do one of the following:
  - If you are installing this patch on a standalone installation of CS or the primary member of a cluster, leave the **Secondary Cluster Member** check box deselected and click **Next**.
  - If you have already installed this patch on the primary member of a cluster and are now installing it on a secondary cluster member, select the **Secondary Cluster Member** check box and click **Next**.
11. In the “Select the Editor” screen, select the third-party WYSIWYG attribute editors you want to update (or install, if they are not present on your CS system). The screen presents the following options:
  - **Install Ektron (eWebEditPro) v 5.1.** eWebEditPro is a third-party embedded WYSIWYG HTML editor from Ektron, Inc.
  - **Install FCKEditor v 2.1.** FCKEditor is a third-party embedded WYSIWYG HTML editor from Frederico Caldeira Knabben.
  - **Install ImageEditor v 3.0.1.12.** Online Image Editor is a third-party embedded image editor from InDis.

#### Note

Existing versions of the editors you select in this screen (including configuration files) will be overwritten by the installer. If you have customized any of those editors and want to retain your customizations, do not select those editors.

When you have made your selection, click **Next**.

12. In the “Before You Install” screen, read the instructions shown, then click **Next**.
13. In the “Ready to Install” screen, click **Install**.

14. In the pop-up warning dialog that appears, click **OK** and wait for the file copy process to complete.
15. Half-way through the installation, the installer displays the “Installation Actions” window. At this point, you must deploy and/or test the updated application.

#### Note

**For customized installations.** If you are updating an installation that contained `.jar` files which you created, verify that the files were carried over during the update. Complete [step 16](#), then [steps 18 – 20](#) of this procedure (skip [step 17](#)).

**For installations with standard `.jar` files.** Complete [steps 17 – 20](#) of this procedure (skip [step 16](#)).

16. **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 (WebSphere, Sun JES, and WebLogic with manual deployment selected):
    - 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 11](#). (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) Restart your application server.
    - 4) Continue with [step 18](#) of this procedure.
  - If Content Server was automatically deployed (all other supported platforms):
    - 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) Restart your application server.
    - 3) Continue with [step 18](#) of this procedure.
17. **For installations with standard `.jar` files.** Do one of the following:
  - If Content Server will be manually deployed (WebSphere, Sun JES, and WebLogic with manual deployment selected), deploy `cs.war` using the command line or the console and restart your application server.
  - If Content Server was automatically deployed (all other supported platforms), restart your application server.
18. Click **Test** in the “Installation Actions” dialog box to test your CS installation, then do one of the following, depending on the test results:
  - If all the tests are successful, close the test results dialog and click **OK**.
  - If any one of the tests fails, refer to the “Installing Content Server” chapter in the installation guide for your platform for possible causes and solutions.

19. In the “Installation Successful” pop-up dialog box, click **OK**.
20. Continue to “[D. Completing the Upgrade](#)” to complete the upgrade process.

## D. Completing the Upgrade

To complete the upgrade process, 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. If you have upgraded from CS 7.0.0, 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 7.0.3 uses asset type ID values when indexing assets, whereas CS 7.0.0 did not.

### Note

Lucene search index data is stored in `<cs_shared_dir>/lucene/Global`, where `<cs_shared_dir>` is the absolute path to the Content Server shared file system directory.

4. 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.
5. (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*.

## E. 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 just upgraded a 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 just 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.

