IBM FileNet Image Services Version 4.2

Upgrade Procedure for Solaris



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Note

Before using this information and the product it supports, read the information in "Notices" on page 53.

This edition applies to version 4.2 of IBM FileNet Image Services (product number 5724-R95) and to all subsequent releases and modifications until otherwise indicated in new editions.

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ibm.com and related resources

Product support and documentation are available from ibm.com.

Support and assistance

Product support is available on the web. Click Support from the product website at:

FileNet Image Services Support

http://www.ibm.com/software/data/content-management/filenet-image-services/

PDF publications

You can view the PDF files online using the Adobe Acrobat Reader for your operating system. If you do not have the Acrobat Reader installed, you can download it from the Adobe website at http://www.adobe.com.

See the following PDF publications website:

Product	Website
Product Documentation for FileNet	http://www.ibm.com/support/docview.wss?rs=3283
Image Services	&uid=swg27010558

How to send your comments

Your feedback is important in helping to provide the most accurate and highest quality information.

Send your comments by using the online reader comment form at https://www14.software.ibm.com/webapp/iwm/web/signup.do?lang=en_US &source=swg-rcf.

Consumability survey

You are invited to tell IBM how to improve the consumability of software products. If you want to help IBM make IBM[®] FileNet[®] P8 easier to use, take the Consumability Survey at http://www.ibm.com/software/data/info/ consumability-survey/.

Contacting IBM

To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

To learn about available service options, call one of the following numbers:

- In the United States: 1-888-426-4343
- In Canada: 1-800-465-9600

For more information about how to contact IBM, see the Contact IBM website at http://www.ibm.com/contact/us/.

Chapter 1. Upgrade planning and procedures

There are several upgrade planning steps that need to be completed before you can start to upgrade your IBM FileNet Image Services system.

The following procedures guide you through the process of upgrading your FileNet Image Services system.

Upgrade Paths

The following upgrade starting points have been tested and approved to upgrade to FileNet Image Services 4.2.0. Make sure that the server you are updating is at one of these FileNet Image Services starting points before beginning this upgrade.

- 4.0.SP5
- 4.1.0
- 4.1.1
- 4.1.2

For information about supported operating systems and databases see, *IBM FileNet Image Services, Image Services Resource Adapter, and Print Hardware and Software Requirements.*

To download these guidelines from the IBM support page, see "ibm.com and related resources" on page v.

Strategy for multiserver upgrades

When upgrading a multiserver FileNet Image Services system, you should upgrade your server types in a specific order and you should be familiar with some basic technologies to accomplish this.

When upgrading the software on a multiserver FileNet Image Services system, upgrade the servers in the following order:

- Root/Index server or Root/Index/Storage Library server
- Storage Library servers
- Application servers

After you have finished upgrading the new software on the first server, you can begin upgrading the software on the next server while you complete the configuration steps on the first server. In this manner, the upgrade of one server can overlap the upgrade of the next server, and so on.

For the Solaris operating system you should be familiar with:

- UNIX operating system
- A text editor such as vi
- The Solaris administration utilities such as the Solaris Management Console (SMC)
- Solaris and Veritas volume manager configuration methods, and an understanding of general logical volume management concepts

- Peripheral device configuration methods (for example tape drives, printers, and storage libraries)
- DB2 or Oracle Database Administration

Chapter 2. Upgrade planning considerations

The prerequisites for upgrading IBM FileNet Image Services are included in the following sections.

General prerequisites for all IBM FileNet Image Services operating systems

You need to be aware of the hardware and software requirements that are common to all FileNet Image Services platforms.

The hardware and software requirements include the following:

Hardware settings

Each of the operating systems supported in this version of FileNet Image Services, have specific hardware settings that must be obtained before upgrading the FileNet Image Services software.

Server memory

- Root/Index and Application Servers with Oracle:
 - 10g 1024 MB memory for each processor in the server.
 - 11g 1024 MB memory for each processor in the server.
- Root/Index and Application Servers with DB2:
- 512 MB memory for each processor in the server.
- Storage Library and Application Servers without RDBMS:
 - 512 MB memory for each processor in the server.
- To determine the total amount of installed memory, enter on each server:
 - RAM: prtconf | grep Memory
 - Free disk space in KB: df -k
- To determine the total number of processors, enter on each server:
 - prtdiag

Look for the value in the CPU section.

Total disk space

The amount of disk space required for RDBMS software depends on whether Server or Client software is installed and the products selected. For more information refer to the following guidelines:

- IBM FileNet Image Services Guidelines for Installing and Updating Site-Controlled Oracle Software on UNIX Servers
- IBM FileNet Image Services Guidelines for Installing and Configuring IBM DB2 Software

To download these guidelines from the IBM support page, see "ibm.com and related resources" on page v.

Space for FileNet Image Services software

FileNet Image Services needs the minimum amounts of free disk space in the file systems shown here:

• 500 MB total space in /fnsw

If /fnsw/local is not a separate file system, the upgrade requires 1000 MB (1 GB) total space in /fnsw. Use the IBM Capacity Planning tool to estimate the actual amount of disk space needed for various datasets on this FileNet Image Services system.

Temporary space

The FileNet Image Services installer also needs a certain amount of temporary disk space in addition to the downloaded FileNet Image Services software modules. Check the following table for the amount of temporary space you will need on your servers and for the name of the directory where the installer intends to place the temporary files.

Operating system	Size in MB	Temporary directory
Solaris	330	/var/tmp

• On UNIX servers, if the/tmp directory does not have adequate free space, the IATEMPDIR environment variable can be manually set to a location with sufficient temporary space. This optional temporary directory must be outside the /fnsw directory structure.

Operating system-specific prerequisites

Each of the operating systems supported in this version of IBM FileNet Image Services, have specific prerequisites that must be met for upgrading the FileNet Image Services software.

See the Hardware and Software requirements guide for the FileNet Image Services software, titled *IBM FileNet Image Services, Image Services Resource Adapter, and Print Hardware and Software Requirements.*

To download these guidelines from the IBM support page, see "ibm.com and related resources" on page v.

Hardware requirements

Each of the operating systems supported in this version of FileNet Image Services, have specific hardware requirements that must be met for upgrading the FileNet Image Services software.

Operating System	OS-specific Prorequicites
Solaria	Convor Hardware
5014115	Server Hardware
	• SUN MICrosystems SPARC
	 UltraSPARC server (32-bit or 64-bit processors)
	Important: Oracle 10g is compatible with only 64-bit servers. DB2 databases must be located on remote AIX or SUN servers.
To determine whether the processor is 32 bit or 64 bit optor	
	isainfo ky
	Operating System Software
	FileNet Image Services is compatible with:
	 Solaris version 9 Operating System (32-bit or 64-bit).
	• Solaris version 10 Operating System (64-bit only).
	If an earlier version of Solaris is currently installed on the server, the System Administrator must upgrade to Solaris 9 or 10 at the appropriate time. If the server is a stand-alone system, the server must be configured as a networked, stand-alone system. In addition, you must have at least the Developer System Support packages installed

Software requirements

An IBM FileNet Image Services system has specific software that is installed as part of the upgrade of the FileNet Image Services software.

FileNet Image Services software

Each operating system that is supported with FileNet Image Services is packaged separately and also includes the COLD software.

IBM FileNet Image Services 4.2 includes COLD 4.2 software and is titled as follows:

• FileNet Image Services & COLD 4.2 for Windows

RDBMS software

The IBM FileNet Image Services release contains several supported relational database management system software options depending upon the operating system running on the server.

IBM DB2 RDBMS software

See the following document for more information:

• IBM FileNet Image Services Guidelines for Installing and Configuring IBM DB2 Software

To download this document from the IBM support page, see "ibm.com and related resources" on page v.

Oracle RDBMS Software (FileNet-controlled)

Attention: The Database Administrator must install the appropriate version of Oracle and must supply the information described in the Oracle Guidelines to the System Administrator before FileNet Image Services can be upgraded.

See the following documents for more information:

- IBM FileNet Image Services Oracle 10g Installation and Upgrade Procedures (FileNet-Controlled)
- IBM FileNet Image Services Oracle 11g Installation and Upgrade Procedures (FileNet-Controlled)

To download these guidelines from the IBM support page, see "ibm.com and related resources" on page v.

Oracle RDBMS Software (Site-controlled)

Attention: The Database Administrator must install the appropriate version of Oracle and must supply the information described in the Oracle Guidelines to the System Administrator before FileNet Image Services can be upgraded.

See the following document for more information:

• IBM FileNet Image Services Guidelines for Installing and Updating Site-Controlled Oracle Software on UNIX Servers

To download these guidelines from the IBM support page, see "ibm.com and related resources" on page v.

Debugging software

Debugging software must be installed on each server. A debugger enables support personnel to troubleshoot both FileNet Image Services and operating system problems.

Debugging Solaris software:

This debugger enables support personnel to troubleshoot both IBM FileNet Image Services and Solaris-related problems. Debugging software is recommended for FileNet Image Services and, if present, must be installed on each server.

Procedure

To determine if the debugger is already installed:

Enter the following command on each server: pkginfo | grep SPROdbgr If this file is present, the debugger is installed. If this file is not present and if the media and license are available, install it. Otherwise, contact your SUN representative for complete ordering information.

Attention: A command line debugger is included with SunStudio Compiler Collection, which includes C, C++ and Fortran compilers for the creation of high-performance, high-quality applications for the Solaris SPARC system.

Related documentation

IBM FileNet Image Services has a variety of reference and procedural documents that you can download from the IBM support site.

To access the related documents, see "ibm.com and related resources" on page v.

- IBM FileNet Image Services System Administrator's Handbook
- IBM FileNet Image Services System Administrator's Companion for UNIX
- IBM FileNet Image Services Installation and Configuration Procedures
- IBM FileNet Image Services Enterprise Backup and Restore User's Guide

- IBM FileNet Image Services Third-Party Backup/Restore Guidelines
- IBM FileNet Image Services Guidelines for Installing and Configuring IBM DB2 Software
- IBM FileNet Image Services Guidelines for Installing and Updating Site-Controlled Oracle Software on UNIX Servers
- IBM FileNet Image Services MSAR Procedures and Guidelines
- IBM FileNet Image Services Integral Single Document Storage Procedures and Guidelines
- IBM FileNet Image Services Oracle 10g Installation Procedures (FileNet-controlled)

Chapter 3. Preparing for the upgrade

Working with the FileNet Certified Professional (FCP) ensures a smooth upgrade. There are preliminary steps you must complete in order to upgrade your software.

Before you begin

Upgrade by a FileNet Certified Professional (FCP) is recommended. For more information on the FCP program, refer to the http://www.ibm.com/us, **Products** > **Software** > **Information Management** > **Training and certification** > **Professional Certification** > **FileNet Certified Professional Program (FCP)**.

Procedure

If an FCP performs the upgrade, at least four weeks before the upgrade, the FCP should do the following:

- Backup the latest FileNet Image Services CDB file. The CDB file is built by the configuration editor (fn_edit) and is stored in the /fnsw/local/sd/conf_db directory. The naming convention is IMS_n.cdb where *n* is a sequentially assigned number that is incremented each time the CDB file is rebuilt. You will likely find several versions of the CDB file.
- 2. Run spacerpt.

Send the results to your service representative, and keep a printed copy for comparison after the upgrade is complete.

Copy the MasterSnmpd_start file

Make a backup copy of the Simple Network Management Protocol (SNMP) file.

Before you begin

For more information on SNMP, see the *IBM FileNet Image Services SNMP Reference Manual*. To download this document, see "ibm.com and related resources" on page v.

Procedure

To copy the MasterSnmpd_start file:

- 1. Log on as a FileNet Image Services user.
- 2. Enter the following command:

cp /fnsw/bin/MasterSnmpd_start /fnsw/local/tmp/MasterSnmpd_save

Installing the new version of FileNet Image Services overwrites the current version of this file. At the end of this upgrade procedure, you will compare the newly installed version against this saved version.

Running spacerpt (Oracle only)

You can run spacerpt to generate information on your database configuration.

About this task

Your service representative can inspect your database configuration to verify that the Oracle RDBMS objects are correct. You must know the f_maint password to run spacerpt.

On servers with local Oracle databases

You can run spacerpt on site-controlled and FileNet-controlled Oracle installations to generate information about your database configuration.

Before you begin

If the Oracle databases, either on site-controlled or FileNet-controlled, are on the same server as FileNet Image Services, follow these steps to run spacerpt.

Procedure

To run spacerpt:

- 1. Log on as the FileNet Image Services user.
- 2. Verify that Oracle is up by entering:

ps -ef | grep ora

If Oracle is running, you see at least four Oracle processes.

- 3. Start the Oracle software if it is not running.
 - If Oracle is Site-controlled, ask the DBA to start Oracle.
 - If Oracle is FileNet-controlled and there are no Oracle processes running, start Oracle:

fn_util startrdb

- 4. As an FileNet Image Services user:
 - In the Bourne or Korn shell enter:
 - spacerpt > output_file_name
 - In the C shell enter:
 - spacerpt > & output_file_name

where *output_file_name* can be any name you choose.

The spacerpt tool verifies that:

- The FileNet Image Services logon and security are intact
- The Advanced internal database structure is intact
- The FileNet Image Services metadata are intact
- 5. Stop Oracle:
 - For Site-controlled Oracle, ask the DBA to stop Oracle.
 - For FileNet-controlled Oracle, enter:

fn_util stoprdb

6. Print a copy of this file and keep it in a safe place. You can compare this copy with the spacerpt that you run at the end of this upgrade procedure.

Back up the server configuration file

You need to make a copy of the /fnsw/etc/serverConfig file and the /fnsw/etc/serverConfig.custom file, if it exists.

Procedure

To back up the server configuration file:

- 1. Logon as an FileNet Image Services user.
- Make a copy of the /fnsw/etc/serverConfig file by entering commands similar to the following:
 - cd /fnsw/etc
 - cp serverConfig serverConfig.save
- If the /fnsw/etc/serverConfig.custom file exists, then make a copy of that file by doing the following:
 - cd /fnsw/etc
 - cp serverConfig.custom serverConfig.custom.save

What to do next

After the upgrade procedure is complete, verify that the server configuration parameters are unchanged by checking the saved file.

Disable FileNet-related Cron jobs

You must disable any FileNet-related Cron jobs for the duration of the upgrade.

About this task

After the upgrade is complete, you can re-enable them. The crontab files are located in /usr/spool/cron/crontabs.

Stop the FileNet Image Services software

There are several things you must do to shut down FileNet Image Services and the associated processes as part of this upgrade.

About this task

Notify all users on the system to logout before you continue with the upgrade procedure. Warn them you are about to shut down the FileNet Image Services software and terminate all processes.

Attention: Startup must be in the opposite order with the root server first, followed by the storage library servers, and finally the application servers.

Tip: If FileNet System Monitor is installed, verify that the cala client and cala rex client are also stopped.

Exiting FileNet Image Services Toolkit applications

As part of the shutdown procedure, you must exit any FileNet Image Services Toolkit applications you have running.

Procedure

To exit from any FileNet Image Services Toolkit (ISTK) applications currently running on the server:

- 1. Log in as a user with root privileges.
- 2. Enter:

/fnsw/client/bin/wal_purge

Later in this procedure you will run the killfnsw command, which clears the FileNet Image Services shared memory.

Stopping the software

You need to perform a single procedure to shutdown the FileNet Image Services software. On a multi-server system, the procedure must be entered on the different server types in a specific sequence.

Procedure

To shutdown the FileNet Image Services software:

- 1. Log in as a FileNet Image Services user.
- Stop the FileNet Image Services software: initfnsw -y stop

In a multi-server system, stop the software in the following order:

- **a**. the application server(s)
- b. the storage library server(s)
- c. the root server
- 3. Kill all remaining processes displayed:

killfnsw -DAy

- The **-D** option kills daemons (such as, TM_daemon).
- The -A option removes all IPC segments.
- The -y option automatically answers Yes to subsequent killfnsw prompts.
- Check that all FileNet Image Services processes have been terminated: ps -ef | grep fnsw

Attention: It is possible that some non-FileNet Image Services processes were started by the fnsw user. These processes will appear in the output of this command. Check the process names shown by this command against the applications in the /fnsw/bin directory to validate that the process belongs to FileNet Image Services.

- 5. If any FileNet Image Services processes remain active, kill each one explicitly: kill process id
- 6. As a user with root privileges, check for any IPC resources that still remain:

Attention: It is possible that some IPC resources are owned by user fnsw but do not belong to FileNet Image Services. This would occur if the fnsw user ran a non-FileNet Image Services application that created IPC resources. Only those IPC resources that belong to FileNet Image Services should be removed, but there is no method for easily determining if a resource belongs to FileNet Image Services. The UNIX ipcrm command can be used to remove the resources. See the online "man" instructions for ipcrm for details on its usage. If in doubt about what resources to remove, the easiest way to clean up the system is to shut it down and restart.

ipcs | grep fnsw ipcs | grep fnusr

Shut down the MasterSnmpd processes

Depending upon the operating system of your system, there are different command you need to run to stop the MasterSnmpd processes.

Procedure

To shut down the MasterSnmpd processes:

- Verify that no MasterSnmpd processes are running: ps -elf | grep MasterSnmpd
- 2. Stop any remaining MasterSnmpd processes:

kill -9 <ProcessID>

3. If the FileNet Image Services Toolkit is also installed on this server, shut down all FileNet Image Services Toolkit applications, then enter: wal_purge

Modify the inittab file

Properly setting the inittab file parameters prevents the IBM FileNet Image Services software from starting automatically each time the server is restarted.

About this task

Run the steps in this section on all servers. Edit the /etc/inittab file to prevent the FileNet Image Services software from starting automatically each time the server is restarted. Later in this procedure you will have the opportunity to re-enable this feature.

Procedure

To edit the /etc/inittab file:

- 1. Log in as a user with root privileges.
- 2. Change to the /etc directory:

cd /etc

- 3. Edit the inittab file using a text editor such as vi).
- 4. Comment out a line similar to the following example. If the relational database software is site-controlled, this line might not exist.

rcfn:234:wait:/bin/sh /etc/rc.initfnsw </dev/console> /dev/console2 >&1

5. Exit the file and save your changes.

Check the logical volume sizes

You need to verify that the fnsw and local logical volumes have enough disk space.

Before you begin

Run the steps in this section on all servers. Verify that the fnsw, local, and Oracle file systems are not being accessed by anyone. Otherwise, the following steps will fail.

Procedure

To check the logical volume sizes:

- 1. Log in as a user with root privileges.
- 2. Start the volume management software.
- 3. Select the volume group where IBM FileNet Image Services is installed.
- 4. Compare the logical volume sizes displayed with sizes shown in the Table 1 table. Your logical volume sizes must be equal to or greater than the sizes in the table. (If any logical volumes are larger than the sizes shown, do not decrease them.)

Table 1. Logical Volume Sizes

Logical Volume Names	Logical Volume Sizes	Free Space	Mount Points
fnsw	500 MB	500 MB	/fnsw

You can increase the size of any of these logical volumes to match the sizes shown in the table, when you upgrade FileNet Image Services later in this procedure.

Continue with the Upgrade

Depending upon the operating you are using, you need to go to the appropriate section of the document to continue your upgrade.

About this task

• To continue upgrading a Solaris Platform, see "Preparing to upgrade FileNet Image Services on a Solaris server."

Preparing to upgrade FileNet Image Services on a Solaris server

There are several tasks you must complete in order to upgrade the IBM FileNet Image Services software on a Solaris server.

Verifying volume management software

Before you can modify or create file systems and volumes for IBM FileNet Image Services, the System Administrator must verify the presence of volume management software on each server.

About this task

The following are the support types of volume management software:

- VERITAS Volume Manager
- Solaris Volume manager.

The system must meet the requirements specified in the volume manager documentation.

Upgrading the Solaris operating system

If necessary, the System Administrator must upgrade the server to a supported version of Solaris before installing IBM FileNet Image Services. Do not install FileNet Image Services until the operating system has been successfully upgraded.

About this task

You can upgrade FileNet Image Services to the following supported Solaris releases:

- Solaris 9
- Solaris 10

Verifying or changing the Solaris operating system kernel limits

Both the IBM FileNet Image Services and the RDBMS are very resource intensive. To satisfy the resource needs of the software, you can modify some default operating system parameters.

Procedure

To verify or change the kernel settings for both Solaris 9 and Solaris 10:

- Edit the /etc/logindevperm file, using a text editor (such as, vi): vi /etc/logindevperm
- Append the following line to the end of the file: /dev/console 0666 /dev/console

This line changes the login-based permissions of the console, and prevents console warning messages from being logged in the error log file.

3. Exit the file and save your changes.

Checking Solaris 9 kernel limits:

You need to verify and edit the /etc/system file by changing the Solaris 9 kernel parameter values, as necessary.

Procedure

- Make a copy of the /etc/system file (with a new name) before performing the procedure contained in this section. To copy the /etc/system file, enter a command similar to the following: cp /etc/system /etc/system.save
- 2. As a user with root privileges, edit the /etc/system file, using a text editor (for example, vi), by entering a command similar to the following: vi /etc/system
- **3**. Verify that the settings match the values shown. If your values are higher, enter the higher values appropriate for your system. Do not enter values lower than those shown below.) If no changes are needed, exit the file and skip to the next section.

Important: Use extreme care when entering the values shown below. Entering values incorrectly may cause general system errors. Before restarting the server, verify the accuracy of each of the lines added to the /etc/system file.

set semsys:seminfo_semmap=50
set semsys:seminfo_semmni=2000
set semsys:seminfo_semmns=2000
set semsys:seminfo_semmnu=500
set semsys:seminfo_semopm=256
set semsys:seminfo_semume=500
set semsys:seminfo_semvmx=32767
set semsys:seminfo_semaem=16384
set shmsys:shminfo_shmmax=4294967295
set shmsys:shminfo_shmmni=2000
set msgsys:msginfo_msgmni=2048
set msgsys:msginfo_msgtql=65536

```
set max_nprocs=400
set fnsod:sod_Debug=0
set rlim_fd_max=1024
set rlim_fd_cur=256
set noexec_user_stack=1
```

DB2 also requires these settings:

set msgsys:msginfo_msgmax=65535
set msgsys:msginfo msgmnb=65536

- 4. Save your changes and exit the file. Your changes go into effect the next time you restart the operating system.
- 5. Skip to the section, "Continue with the Solaris Upgrade" on page 19.

Checking Solaris 10 kernel limits:

Solaris 10 provides the Resource Control Facility feature for setting kernel parameters. You need to verify and edit the /etc/project file by changing the kernel parameter values, as necessary.

About this task

Solaris 10 provides the Resource Control Facility feature for setting kernel parameters. See the Solaris 10 documentation on the Sun website for information about this feature. The values of the parameters in the project file override the values of the parameters in the /etc/system file. Make sure that the values of the parameters in the project file are the same as or greater than the values of the parameters in the /etc/system file.

Important: You can make kernel parameter changes for IBM FileNet Image Services to the Solaris Resource Control Facility whether or not you are using zones in Solaris 10. In Solaris 10, you can define a Solaris 10 project and attach resources to the project. For more information, see the Solaris documentation.

Procedure

To check the Solaris 10 kernel parameters:

- 1. Log on as the FileNet Image Services software user. A project is dependent upon a user or a group to get the resource controls for that user.
- Enter the following process control command at the shell prompt to see the resource controls associated with active process, tasks, and projects:
 prctl \$\$
- 3. Verify that the values are set as indicated in the **Solaris 10 for FileNet Image Services** column of the following table. These kernel parameter values are the preferred values for FileNet Image Services with Solaris 10. If you have not specified kernel parameters in the /etc/project file, the system uses the default values, which are adequate in most cases.

Important: All IPC kernel parameters in the /etc/system file are obsolete, but it is all right to have obsolete parameters in the /etc/system file on a Solaris 10 system. These parameters are used to initialize the default resource control values as in previous Solaris releases. See the *Solaris Tunable Parameters Reference Manual* on the Sun website for details.

Table 2. Solaris 10 tunable parameters

		Solaris 10 for FileNet Image
Parameter Name	Solaris 10 Default	Services
max-sem-nsems	512	512
max-sem-ops	512	512
max-sem-ids	128	2048
max-shm-ids	128	2048
max-msg-ids	128	2048
max-shm-memory	1/4 Physical memory	4 GB
max_nprocs	10 + (16 x maxusers) (2048 or server physical memory (in MB), whichever is less)	default
Rlim_fd_max	65536	65536
Rlim_fd_cur	256	256
Noexec_user_stack	0	1
process.max-msg-qbytes	65536	65536
process.max-msg-messages (msgtql)	8192	65536

- 4. Log on the server as a user with root privileges.
- 5. Make a copy of the project file and rename the system file:
 - cp /etc/project /etc/project.save
 - mv /etc/system /etc/system.save
- 6. View the current settings for the FileNet Image Services user and the Oracle user, and then return to root user.

Option	Description
For the FileNet Image Services user, enter:	su – fnsw projects –l
For the Oracle user, enter:	su - oracle projects -l

- If a project does not exist for the FileNet Image Services user, enter a command similar to the following to create the necessary parameter: projadd -U fnsw -K "project.max-shm-memory=(priv,4GB,deny)" user.fnsw
- 8. If a project does exist for the FileNet Image Services user, enter a command similar to the following to modify it:

projmod -sK "project.max-shm-memory=(priv,4GB,deny)" user.fnsw

Update the four other kernel parameters required for the FileNet Image Services user in etc/project. Their values must match the values in the **Solaris 10 for FileNet Image Services** column of the table. As an example:

projmod -sK "project.max-shm-ids=(priv,2048,deny)" user.fnsw projmod -sK "project.max-msg-ids=(priv,2048,deny)" user.fnsw projmod -sK "project.max-sem-ids=(priv,2048,deny)" user.fnsw projmod -sK "process.max-msg-messages=(priv,65536,deny)" user.fnsw

Tip: These five parameters are the only ones that you must set for the FileNet Image Services user. The default values of the other parameters are acceptable.

You might optionally choose to increase the process.max-msg-qbytes parameter to support multitasking. If you specify this parameter, the value must be larger than the default value of 65536.

9. If a project does not exist for the RDBMS software user, such as oracle, enter a command similar to the following to create one:

projadd -U oracle -K "project.max-shm-memory=(priv,4GB,deny)" user.oracle

10. If a project does exist for the RDBMS user, such as oracle, enter a command similar to the following to modify it:

projmod -sK "project.max-shm-memory=(priv,4GB,deny)" user.oracle

Tip: The max-shm-memory parameter is the only one that you must set for the RDBMS user. The default values of the other parameters are acceptable.

11. Create a new /etc/system file:

vi /etc/system

12. Add the following value to the file:

set noexec_user_stack=1

Tip: This parameter is the only one that is required in the /etc/system file.

- View the /etc/system.save file that you created earlier, and transfer any additional values that are required by your existing applications to the /etc/system file.
- 14. Exit the file and save your changes.
- **15.** Verify that the new active kernel values for both FileNet Image Services and Oracle users match the projects -1 output that you received in .

Option	Description
For the FileNet Image Services user, enter:	su - fnsw prctl \$\$
For the Oracle user, enter:	su - oracle prctl \$\$

 Verify the contents of the /etc/system file by entering: more /etc/system

Debugging Solaris software

This debugger enables support personnel to troubleshoot both IBM FileNet Image Services and Solaris-related problems. Debugging software is recommended for FileNet Image Services and, if present, must be installed on each server.

Procedure

To determine if the debugger is already installed:

Enter the following command on each server: pkginfo | grep SPROdbgr If this file is present, the debugger is installed. If this file is not present and if the media and license are available, install it. Otherwise, contact your SUN representative for complete ordering information.

Attention: A command line debugger is included with SunStudio Compiler Collection, which includes *C*, *C*++ and Fortran compilers for the creation of high-performance, high-quality applications for the Solaris SPARC system.

Continue with the Solaris Upgrade

It is necessary for you to upgrade your RDBMS software on your Solaris system.

About this task

To continue with the upgrade, go to Chapter 4, "Upgrading the relational database software," on page 21.

Chapter 4. Upgrading the relational database software

Verify that the relational database software has been upgraded, if necessary.

Obtain the necessary parameters from the Database Administrator. See the following documents for more information:

- IBM FileNet Image Services Guidelines for Installing and Updating Site-Controlled Oracle Software on UNIX Servers
- IBM FileNet Image Services Oracle 10g Installation and Upgrade Procedures (FileNet-Controlled)
- IBM FileNet Image Services Oracle 11g Installation and Upgrade Procedures (FileNet-Controlled)
- IBM FileNet Image Services Guidelines for Installing and Configuring IBM DB2 Software

To download these documents, see "ibm.com and related resources" on page v.

Chapter 5. Upgrading the FileNet Image Services software

At this point, compatible versions of the operating system software and the relational database software have already been installed on your FileNet Image Services system. Perform the steps in this section on all servers.

Before you start the installation program

Complete the tasks in this section before you start the IBM FileNet Image Services installation program.

Procedure

To export the display from a remote terminal:

- 1. Log in as a user with root privileges.
- 2. If you are running this program in graphical mode from a remote terminal, export the display from the server to your current terminal.
 - In the Bourne or Korn shell, enter:

export DISPLAY=host_identifier:0

• In the C shell, enter:

setenv DISPLAY host_identifier:0

where *host_identifier* is the server identifier, either a name or IP address.

3. If you are running the installation program in graphical mode from a remote terminal, allow access to the host display by entering this command at the remote terminal:

xhost +

4. If the server has an Xconsole, rather than an ASCII terminal, enter the *xhost* + command there, too.

Important: If you used the su command to switch from any user to root user, enter the xhost + command at the original CDE login window.

Tip: To test your DISPLAY setting enter: xclock &

If the clock appears on your remote terminal screen, the DISPLAY variable was exported correctly. If you don't see the clock, try the export or setenv command again using the IP address rather than the server name.

5. Start the FileNet Image Services Software Installation.

Common desktop environment

The Common Desktop Environment (CDE) is a graphical user interface that runs in conjunction with the X Windows System. Like X Windows, CDE automatically opens an Error Log window and a FileNet Image Services DT term window when you logon.

Procedure

• To enable CDE manually, you can run the following script as a user with root privileges: /fnsw/etc/DTwindows.

- Non-GUI commands can be performed at either the GUI terminal or the ASCII terminal.
- If you are using an international keyboard, remember to select the keyboard language when you first logon to CDE. At the logon box, select **Options** > **Language**. Then choose the appropriate keyboard language from the menu.

Starting the installation program

Run a System Check to verify the configuration prerequisites and upgrade the FileNet Image Services software.

About this task

You can choose to run both the System Check and FileNet Image Services installation program, or the System Check only.

Important: The current version of FileNet Image Services can run while you are performing the System Check.

The System Check inspects the server for prerequisites and lists any warning and error conditions in two locations:

- · Pop-up windows on your screen.
- Report and log files in the /fnsw/local/logs/install/4.2.0/ directory.

The FileNet Image Services Installation program can run in graphical, console, or silent mode.

- Graphical mode is the default graphical interface and is described later in this section.
- Console mode offers a plain text interface for workstations that do not support graphical mode.
- Silent mode displays nothing on the screen while the installation program is running. Review the install log file for access to the progress and results of the installation.

Procedure

To start the FileNet Image Services installation program:

- 1. Log on as a user with root privileges.
- 2. For Silent Installation only, locate the appropriate options.txt file. The option file contains standard responses to the installation program prompts. Copy the file to a local directory on your server. (You can rename it to something shorter, such as opt.txt.) The options and their default values are fully described in the file. Use your preferred text editor to make changes and save the file.
- 3. If you plan to run the installation program in silent mode, and you determined earlier that the /var/tmp directory does not have enough free space, set the IATEMPDIR environment variable to an alternate directory. The alternate temporary directory must be outside the /fnsw directory structure. For example, you might enter:
 - In the Bourne shell, enter: IATEMPDIR=/othertemp export IATEMPDIR
 - In the Korn shell, enter: export IATEMPDIR=/othertemp

• In the C shell, enter:

setenv IATEMPDIR /othertemp

where */othertemp* is the full file path to the alternate temporary directory. The amount of free temporary space necessary for Solaris is 330 MB

- 4. The InstallAnywhere installation program requires that the PATH environment variable contain the location of the gzip program. InstallAnywhere uses the gzip program to uncompress the software files. . For example, you might enter:
 - In the Bourne shell, enter: PATH=/usr/bin:.:\$PATH export PATH
 - In the Korn shell, enter: export PATH=/usr/bin:.:\$PATH
 - In the C shell, enter:
 - setenv PATH /usr/bin:.:\$PATH
- 5. As a user with root privileges, change to the directory where the FileNet Image Services software is located and invoke the appropriate installation program.

Important: If you are upgrading from CD-ROM, do not cd to /cdrom to run the program. Run the installation program from the / (root) file system.

• Graphical mode: ./is_4.2.0_sun.bin &

Important: The trailing ampersand (&) in the command causes the installation program to open in a new console window. Use the console window to correct any configuration errors reported by the installation program.

- Console mode plain text interface: ./is_4.2.0_sun.bin -console
- Silent mode no screen display: ./is_4.2.0_sun.bin -i silent -options /tmp/opt.txt

Important: /tmp/opt.txt is the location of the text file you modified in step 2 on page 24. Specify its full path on the command line. For example, -options /fnsw/local/tmp/opt.txt.

If you run the System Check in silent mode, check the log file in /fnsw/local/logs/install/4.2.0 to determine the results. The name of the log file is IS_4.2.0.log.

- 6. In graphical mode, you will see a series of screens. It might take a few minutes to display.
- 7. When prompted by the Installer, select the **Upgrade** option.
- 8. Run either the System Check only or the System Check and Install FileNet Image Services.

During the System Check, the installation program verifies the status of server characteristics in these categories:

- Hardware checks
- Operating system checks

The same checks are performed for both the System Check only and the System Check and Install FileNet Image Services options. Items in the status column are color-coded to indicate:

• Pass (green) indicates that the check has passed.

- **Optional** (yellow) indicates that the check encountered a value that might affect the performance of the FileNet Image Services system, if it is not corrected. However, the installation program can continue.
- Fail (red) indicates that a check has failed and the installation program cannot continue.

Some System Checks produce only warnings, while others prevent the installation of FileNet Image Services:

Table 3. System check warnings and errors

Severity
Prevents installation
Prevents installation
Warning only
Prevents installation
Prevents installation
Warning only
Warning only
Prevents installation

Upgrade FileNet Image Services

Depending on the processor speed of your server, expect the upgrade to take approximately 20 minutes.

As the FileNet Image Services upgrade progresses, check the log file to verify that the information displayed is correct for your system.

When the software upgrade is finished, the upgrade installation program creates an uninstaller, and then verifies the version information. After a successful upgrade, the final screen prompts you to restart your computer so that the upgrade can take effect.

Important: Do not start any server until the Root/Index server upgrade is complete.

Tip: If you have several FileNet Image Services servers to upgrade in a multiserver environment, you can begin installing the FileNet Image Services software on the next server while you continue to configure the FileNet Image Services software on the current server. Upgrade the FileNet Image Services servers in the following order:

- 1. Root/Index server
- 2. Storage Library server
- 3. Application server

Chapter 6. Configuring the IBM FileNet Image Services software

This section describes the steps to configure the FileNet Image Services software on UNIX platforms.

About this task

Tip: To log in as a specific user to run the FileNet Image Services tools and software, add this user to both the fnadmin and fnop groups.

Install the required pre-startup fixes

Perform this task only if you upgraded the relational database management system (RDBMS).

Procedure

To install the fixes:

At this time, install only the fixes that directly relate to IBM FileNet Image Services upgrade issues. Search through the Release Notes file for the key words PRE-STARTUP and REQUIRED. To download this document, see "ibm.com and related resources" on page v

These are only the fixes required to start FileNet Image Services successfully. Wait to install any other fixes until after the upgrade has been successfully completed.

Installing a new fnsod driver

This section applies ONLY to servers with optical storage libraries attached.

About this task

This procedure does not apply to Root/Index servers in a Dual server configuration, Application servers, or servers using cache-only, MSAR, or other storage options such as Centera, DR550, Snaplock, and so on.

The FileNet Image Services installer cannot install a new fnsod (FileNet SCSI Optical Device) driver automatically, so you must install it manually.

Procedure

To install the new fnsod driver:

As a user with root privileges, enter: fnsod.install. The new driver will go into effect the next time you restart the server.

Installing the user environment templates

Use the inst_templates tool to install the user environment templates.

Before you begin

Perform this task only if you upgraded the RDBMS.

Procedure

To install the templates:

The inst_templates tool sets up profile and environment files that are customized for IBM FileNet Image Services.

In the following subsection, if applicable, you will run inst_templates as the

- FileNet Image Services user
- a user with root privileges
- an RDBMS user (DB2 or Oracle)

The inst_templates program creates or modifies environment files (such as .cshrc, .login, .profile, and others). You will be prompted before each file is modified if you want to proceed with the change to the file.

- If you accept the change (by entering y), the existing file is renamed with a old.n extension (where n is incremental). A new file is created using the original file name.
- If you decline the change (by entering n), the file will not be changed or moved.

If you customized the environment files in a particular user's directory, answer n (No) to each of the prompts. After you have finished running inst_templates, merge the settings in the templates with your customized environment files. The templates can be found in /fnsw/etc/*.template.

If you run inst_templates more than once, existing .old files are not overwritten. The new .old files are given .old.0 extensions, and each time you run inst_templates after that, the last digit of the file name increases. For example, if you have run inst_templates several times, you might see .login, .login.old, .login.old.0, .login.old.1, and .login.old.2 files in the user's home

directory. The .login file is the current file, while the .login.old.2 is the most recent .old file.

Configuring the software user environment

Use the inst_templates tool to configure the environment for the IBM FileNet Image Services software user.

Procedure

To configure the software user environment:

- 1. Logon as the FileNet Image Services user. (Do not su to change your user name.)
- 2. Enter the following command:

/fnsw/etc/inst_templates

- 3. Enter y (Yes) to confirm all prompts that display.
- 4. On servers with Oracle software, verify that the *ORACLE_HOME* variable (for Oracle software) is set correctly and that the *ORACLE_SID* variable is set correctly in the .profile and .cshrc files.

Configuring the root user environment (optional)

Use the inst_templates tool to configure the environment for the root user.

Procedure

To configure the environment for the root user:

- 1. Log on as a user with root privileges.
- 2. Verify that the *ORACLE_HOME* (for RDBMS software) and the *ORACLE_SID* variables are set correctly in the environment. Enter:

env | grep ORACLE

Complete the remaining steps in this section only if you do not have a specialized root environment already established on your system (for example, a .login file with specific system-related entries). If you already have a root environment established, skip the rest of this section.

3. Enter the following command:

/fnsw/etc/inst_templates

4. Enter y (Yes) to confirm all prompts that display.

Configuring the RDBMS (DB2 or Oracle) user environment (if applicable)

If the Database Administrator wants the RDBMS user to use IBM FileNet Image Services environment variable settings, complete the steps in this section.

Procedure

To configure the environment for the db2 or oracle user:

- 1. Logon as an RDBMS user, such as db2 or oracle.
- 2. Enter the following command:

/fnsw/etc/inst_templates

3. Enter y (Yes) to confirm all prompts that display.

Resetting the environment variables

Log out and log in again to reset the environment variables.

Procedure

To reset the environment variables:

If you initially logged in to Common Desktop Environment (CDE) as a user with root privileges, as the FileNet Image Services user, such as fnsw, or as the RDBMS user, such as oracle, log completely out of CDE and log back in again to reset the environment variables. Otherwise, close all the current windows for these users and open new windows to apply the new environment variable settings.

Setting file ownerships and permissions

Use the fn_setup tool to verify that the permissions are set correctly for IBM FileNet Image Services files and directories.

About this task

Use the fn_setup tool to verify the following:

- permissions are set correctly for the FileNet Image Services software.
- all the necessary directories have been created
- · permissions for these directories and system files are set correctly

Tip: The fn_setup program attempts to set the permissions for all files under the /fnsw and /fnsw/local directories using a permission_table that is upgraded with each new FileNet Image Services release. If non-FileNet Image Services files are placed in the /fnsw directory structure, a local_permission_table needs to specify the appropriate permissions for these files. See Chapter 3, "Directories and Files," of the System Administrator's Companion for UNIX for details. To download these guidelines from the IBM support page, see "ibm.com and related resources" on page v.

Even though fn_setup runs as the root user, fn_setup might not be allowed to set permissions on some secured files. If fn_setup cannot change permissions on a file, it logs an error and continues. Run fn_setup the first time as a user with root privileges.

Procedure

- 1. As a user with root privileges, enter: fn_setup
- 2. Reply to the prompts with the requested information. If the default value shown in brackets is correct, press **Return** to continue.
 - a. The NCH server is generally the Root server. If you are updating a separate Storage Library server or an Application server, select 2=no.

Is this the NCH server (1=yes, 2=no) [1]:

b. The NCH server name is generally the name of the Root server. If you are updating a separate Storage Library server or an Application server, enter the name of the Root server.

Enter NCH server name [sunrise:YourCorp]:

c. The system serial number should be the serial number of the server you specified in the previous step, generally the Root server.

Enter system serial number [11008016xx]:

Important: The 10-digit ssn is written onto all storage media and must be unique for each FileNet Image Services system. If you have more than one FileNet Image Services system (domain), each must use its own unique ssn to prevent potential problems if media are ever transferred from one IS system to another.

d. Relational databases are only configured on servers with Index services, WorkFlo Queue Services (WQS), or SQL services. If you are updating a separate Storage Library server, or an Application server without one of these services, select 0=none.

Enter the relational database type configured on this server (0=none, 1=Oracle, 2=DB2) [1]

e. If a relational database exists on the server, enter the full pathname of the directory where the RDBMS software is located.

Enter the RDBMS home directory [/usr/ora/11g]:

f. If a relational database exists on the server, enter the user and group IDs at the following prompts.

Enter the RDBMS user ID [oracle]: Enter the RDBMS group ID [dba]:

3. Confirm your entries and continue.

This is the setup configuration:

Do you want to continue (y/n) [y]:

4. After fn_setup completes, review the log file.

less /fnsw/local/logs/fn_setup/fn_setup.log

- If fn_setup logged no errors, it finished successfully. Skip to "Modify TCP/IP port settings."
- If fn_setup returns any errors that do not pertain to optical libraries, correct the error and run fn_setup again.
- If fn_setup returned errors pertaining only to the optical libraries, as shown in this example, remove the old device links.

fn-setup: Cannot set /fnsw/dev/1/osara to have permission mode: 0770 fn-setup: Cannot set /fnsw/dev/1/osara to have owner/group: 80/80 fn-setup: Cannot set /fnsw/dev/1/odda1 to have permission mode: 0770 fn-setup: Cannot set /fnsw/dev/1/odda1 to have owner/group: 80/80 fn-setup: Cannot set /fnsw/dev/1/osara to have permission mode: 0770 fn-setup: Cannot set /fnsw/dev/1/osara to have permission mode: 0770

These errors are caused by a change in the optical library driver addressing formulas. New drivers were generated when you installed FileNet Image Services earlier. Continue with the next section to remove the old optical device links.

Removing optical device links (if necessary)

The steps in this section are necessary only if you received errors that pertain to optical devices during fn_setup.

About this task

If you received fn_setup errors that pertain to optical devices, remove the old device links by following these steps:

Procedure

To remove the old device links:

1. Change to the /dev directory and list the fnsod entries.

```
cd /dev
ls -l fnsod*
```

2. Review the dates of each of the entries. As a user with root privileges, remove all the old fnsod device links. For example, rm fnsod.0,1,2,0

What to do next

Later in this procedure, you must reconfigure the storage libraries to use the new device links. For now, continue with the section, Modify TCP/IP Port Settings (Solaris).

Modify TCP/IP port settings

You can modify TCP/IP port settings on Solaris systems.

About this task

In this section you will make your FileNet Image Services system run more efficiently by making changes to the /etc/rc2.d/S69inet file. This modification expands the number of available ephemeral ports and reduces the time-out delay. These modifications are not required, but have been optimized for running FileNet Image Services software.

Sun suggests that Solaris 10 users use SMF (Service Management Facility) manifest files. You can download and enable the sample manifest files (network-anon.xml) from http://opensolaris.org/os/community/smf/manifests/. If you have questions, contact Sun technical support.

- Ephemeral ports are temporary ports assigned by a server's Internet Protocol (IP) stack, and are assigned from a designated range of ports for this purpose. When network traffic is extremely heavy, it is possible to run out of ephemeral ports unless you specify a wider range of port numbers in /etc/rc2.d/S69inet.
- The tcp_close_wait_interval parameter determines the length of time the server waits before reusing a closed ID socket. Although the default value is typically around 240000 milliseconds (four minutes), you can safely reduce this parameter to as little as 30000 milliseconds (30 seconds) on high-speed networks.

Procedure

To modify the TCP/IP port settings:

- 1. Create a backup of the /etc/rc2.d/S69inet file before you modify it.
- If the file does not exist, create the /etc/rc2.d/S69inet file with your preferred text editor.
- As a user with root privileges, verify that you have write permission on this file: chmod 754 /etc/rc2.d/S69inet
- 4. To ensure proper ownership of the file, verify that the owner is set to root and the group is set to sys. If the file does not have the proper ownership, run the following command:

chown root:sys S69inet

- 5. Use your preferred text editor (such as vi) to modify the/etc/rc2.d/S69inet file.
- 6. Add the following lines to the end of the file:

```
ndd -set /dev/udp udp_smallest_anon_port 42767
ndd -set /dev/udp udp_largest_anon_port 65535
ndd -set /dev/tcp tcp_smallest_anon_port 42767
ndd -set /dev/tcp tcp_largest_anon_port 65535
ndd -set /dev/tcp tcp_close_wait_interval 30000
```

7. Save your changes and exit. These changes will go into effect when the server is restarted in the section, "Restart the server."

Restart the server

Use the appropriate command for your operating system to restart the server.

Procedure

To restart the server:

As a user with root privileges, enter the shutdown command: /etc/shutdown -i6 -g0 -y

After the server has restarted, log on as a user with root privileges.

Additional relational database tasks

The database administrator is responsible for completing the remaining tasks for configuring the relational database.

Before you begin

Perform the steps in this section on these servers:

- Root/Index server during a Dual server upgrade.
- Root/Index/Storage Library server during a Combined server or Entry server installation.
- Application server with WorkFlo Queue services, SQL services, or VWServices.

Important: If you are upgrading a FileNet-controlled Oracle installation, skip to the appropriate document to upgrade your Oracle software:

- IBM FileNet Image Services Oracle 10g Installation and Upgrade Procedures (FileNet-Controlled)
- IBM FileNet Image Services Oracle 11g Installation and Upgrade Procedures (FileNet-Controlled)

To download these documents, see "ibm.com and related resources" on page v.

For non-clustered FileNet Image Services systems

If the IBM FileNet Image Services system is configured with a site-controlled relational database (on a local or on a remote database server), verify that the relational database is started before running the fn_setup_rdb command.

Procedure

As a FileNet Image Services user, enter the following command to upgrade the FileNet Image Services configuration files and relational database-related files: fn_setup_rdb -u

For clustered FileNet Image Services systems

When upgrading a clustered system to IBM FileNet Image Services 4.2, the configuration command must not be run until all nodes have been installed.

Procedure

As a FileNet Image Services user, enter the following command to upgrade the FileNet Image Services configuration files and relational database-related files: fn setup rdb -u

Results

The configuration command issues the following warning prompt when it is started.

WARNING: If this is a cluster installation, fn_setup_rdb -u must NOT be run until all nodes of the cluster have been upgraded. Enter Y to continue or N to abort:

Verify the setup_config file

Verify that the value of RDBMS_HOME is set to the location of the Oracle Client software.

Procedure

To verify the setup_config file:

1. As a user with root privileges, use your preferred text editor to view the setup_config file. Enter:

```
cd/fnsw/local
vi setup config
```

- 2. Verify that the value of RDBMS_HOME is set to the location of the Oracle Client software.
- 3. Exit from the file and save changes, if necessary.

Configure optical libraries

You can optionally configure optical libraries either automatically or manually.

Before you begin

Attention: Optical libraries are not supported in a Solaris Zone environment.

Procedure

To configure optical libraries:

If you encountered fn_setup errors pertaining to the optical libraries earlier in this procedure, you can now reconfigure them automatically or manually. If fn_setup ran successfully, go to Chapter 7, "Completing the upgrade," on page 37.

Starting the configuration editor

The fn_edit tool starts the IBM FileNet Image Services Configuration Editor.

Procedure

To start the Configuration Editor:

As the FileNet Image Services user, start the Configuration Editor by entering: fn_edit &

Automatically configure a storage library or Optical Disk Unit

A storage library can be configured automatically if it is powered on, and if it is physically connected to the server where you are running fn_edit.

Procedure

To configure a storage library automatically:

1. On the **Procedures** tab, scroll through the list of available procedures and select **Automatically Configure a Storage Library**.

The fn_edit program acquires all the information it needs directly from the storage library or Optical Disk Unit, and does not display any messages unless it encounters an error.

2. After the storage library has been configured, skip to the section, "Verifying storage library information" on page 35.

Manually configure a storage library or Optical Disk Unit (ODU)

You can manually configure optical disk units.

About this task

Configure the storage library or Optical Disk Unit manually with these steps:

Procedure

To manually configure a storage library:

- 1. On the **Procedures** tab, scroll through the list of available procedures and select **Manually Configure a Storage Library**.
- **2**. Respond to the prompts with the appropriate information, and supply the following details:
 - Library type
 - Library number
 - Number of optical drives in the library
 - Types of optical drives in the library
 - Position of the optical drives in the library
 - SCSI address of each optical drive and the library's robotic arm
- **3**. After you have answered all of the prompts, fn_edit completes the configuration.

Verifying storage library information

To view the result of the procedure and to see information on other storage libraries that are already configured on the system, select the **Storage Libraries** tab.

Exit the configuration editor

When you have finished configuring optical libraries, exit the system configuration editor.

Procedure

To exit the system configuration editor:

Exit fn_edit by selecting Exit from the File pull down menu. If you have not made any changes, it is not necessary to save the file.

Build the system configuration files

Use the fn_build tool to rebuild the system configuration files.

Procedure

To build the system configuration files:

- As fnsw user, rebuild the system configuration files by entering: fn_build -a
- 2. Verify that this command runs successfully by checking that no errors have occurred. If errors were reported, identify and correct the cause of the errors before continuing to the next section.

Chapter 7. Completing the upgrade

This is the final phase of the upgrade procedure. In this topic you will verify that the upgrade was successful.

About this task

In this section you will:

- · Verify the Configuration Database and Other Files
- Perform Various System Tests
- Re-enable cron jobs

Verify the server configuration

The processes that use the serverConfig file search for a file named serverConfig.custom. If it does not exist, the processes use the default serverConfig file.

Before you begin

When the installation program upgrades the serverConfig file, it copies the existing serverConfig file to a temporary serverConfig.bak file and installs the new serverConfig file in its place.

- If the contents of the two files are different (except for the file stamps), the installation program renames the temporary file to serverConfig.custom.
- If the contents of the two files are identical (except for the file stamps), the installation program removes the temporary serverConfig file, and the newly installed serverConfig file becomes the default.

About this task

Perform the steps in this section on all servers. At the beginning of this upgrade procedure, you made a backup copy of the /fnsw/etc/serverConfig file. The serverConfig file was named serverConfig.save and placed in the /fnsw/install/backup/fnsw/etc directory. If applicable, the /fnsw/etc/ serverConfig.custom file was saved as serverConfig.custom.save in the /fnsw/install/backup/fnsw/etc directory.

Compare the files for the following circumstances:

- If a /fnsw/etc/serverConfig.custom file was **not** in use before the FileNet Image Services upgrade, then compare the new /fnsw/etc/serverConfig to the /fnsw/install/backup/fnsw/etc/serverConfig.save file. If they are different, change the values of the new /fnsw/etc/serverConfig with the ones from the /fnsw/install/backup/fnsw/etc/serverConfig.save file.
- If a /fnsw/etc/serverConfig.custom file was in use before the FileNet Image Services upgrade, then compare the new /fnsw/etc/serverConfig to the /fnsw/install/backup/fnsw/etc/serverConfig.custom.save file. If they are different, change the values of the new /fnsw/etc/serverConfig file with the ones from the /fnsw/install/backup/fnsw/etc/serverConfig.custom.save. file.

Important: A new request handler has been introduced called password encryption and decryption (PED). If you are using a serverConfig.custom file verify it includes the following entry for a proper functioning system.

PEDs 0134231080 1 12 0 0

Procedure

To verify the serverConfig file:

 As fnsw user, compare the file you saved (/fnsw/install/backup/fnsw/etc/ serverConfig.save, for example) with the newly installed serverConfig file by entering the following commands:

```
cd /fnsw/etc
diff serverConfig serverConfig.save | more
```

- 2. If the file serverConfig.save contains parameters that are different from the new serverConfig. Use your preferred text editor to edit the serverConfig.save file.
- 3. If any values in the new serverConfig file are higher than those in the serverConfig.save file, always keep the higher value.
- 4. Rename the resulting file serverConfig.custom.

Verify the MasterSnmpd_start file

Check the destination (IP address or server name) of the System Administrator's SNMP Management station.

Before you begin

At the beginning of this upgrade procedure, you made a backup copy of the /fnsw/bin/MasterSnmpd_start file. View the file that you saved (/fnsw/local/tmp/MasterSnmpd_save, for example) and check the destination (IP address or server name) of the System Administrator's SNMP Management station. In the newly installed MasterSnmpd_start file, the destination address is set to local by default, so you might need to edit this file to insert the correct destination.

Procedure

To edit the MasterSnmpd_start file:

- 1. Use a text editor to edit the file:
 - vi /fnsw/bin/MasterSnmpd_start
- For example, change: trap_host='local' to either trap_host="135.10.0.44"

or to

trap_host="venice"

where 135.10.0.44 is the IP address of SNMP Management station and venice is the DNS resolvable server name of the station.

Tip: If your system uses IPv6 network addressing, enter the DNS resolvable server name.

If the destination address is not set correctly, the SNMP Management station will no longer receive event notifications (traps).

SNMP improvement for Solaris 10 users

If you are using SNMP and have upgraded to Solaris 10, remove any modifications you made to the init.snmpdx and MasterSnmpd_start files because of Solaris 9. Solaris 10 has different functionality in regards to init.snmpdx. As a result, modification to the init.snmpdx and MasterSnmpd_start files is no longer necessary.

About this task

See the section, Solaris Host with snmpdx (Solaris 9 Only) in the *IBM FileNet Image Services SNMP Reference Manual* for more information. To download this manual from the IBM support Web site, see "ibm.com and related resources" on page v.

Start FileNet Image Services

Start the software and review the status using the event log.

Before you begin

Important: If you are using a remote database, make sure that the remote database is started.

Procedure

To start the IBM FileNet Image Services software:

- Logon as the FileNet Image Services user, such as fnsw, and stop all processes: killfnsw -DAy
- 2. Start the Task Manager:

Xtaskman &

- 3. After the TM_daemon message displays in the Process table, select the **Monitor** menu.
- 4. From the Monitor menu, select the Event Logs option.
- 5. From the Event Logs window, select the **DISPLAY** menu. Select **Dynamic**. The **Dynamic** option enables screen refreshes each time the messages are logged.
- 6. Switch to the Task Manager window.
- 7. From the Task Manager window, select START.

You will receive system messages in the Current Status window as FileNet Image Services starts. Once the software startup process finishes, the **CLOSE** button is highlighted.

- 8. Select CLOSE.
- **9**. Review the contents of the Event Logs window to verify that there are no error messages from the software startup.

Run spacerpt (Oracle only)

If the Oracle databases, either Site-controlled or FileNet-controlled, are on the same server as IBM FileNet Image Services, run spacerpt after the upgrade and compare the results to the spacerpt you ran before the upgrade.

On servers with local Oracle databases

If the Oracle databases, either Site-controlled or FileNet-controlled, are on the same server as IBM FileNet Image Services, follow these steps to run spacerpt.

Procedure

To run the spacerpt tool:

- 1. As an FileNet Image Services user, verify that Oracle is up:
 - ps -ef | grep ora

If Oracle is running, you will see at least four Oracle processes. If not, start the Oracle software.

- If Oracle is Site-controlled, ask the DBA to start Oracle.
- If Oracle is FileNet-controlled and there are no Oracle processes running, start Oracle:
 - fn_util startrdb
- 2. As an FileNet Image Services user, enter:
 - In the Bourne or Korn shell:

spacerpt > <output_file_name>

• In the C shell:

spacerpt > <output_file_name>

where <output_file_name> can be any name you choose.

The spacerpt tool verifies that:

- the FileNet Image Services logon and security are intact
- the Advanced internal database structure is intact
- the FileNet Image Services metadata are intact
- **3.** If spacerpt does not run, verify that the f_maint password has been set and exported correctly.
- 4. Print a copy of this file and keep it in a safe place. You can compare this copy with the spacerpt run at the beginning of this upgrade procedure.

Test the FileNet Image Services and user applications

Verify that IBM FileNet Image Services is running properly by testing the system in native mode. Verify that you can scan, index, commit, fax, and print manually using IBM FileNet Capture Professional or IBM FileNet IDM Desktop.

Before you begin

Native mode is preferred in this case for two reasons:

- Only FileNet Image Services errors will be displayed. API-oriented errors can be tested after FileNet Image Services processes have been tested.
- FileNet Image Services errors will display during their specific stage of document entry or retrieval. This reduces your troubleshooting time.

Procedure

To test the user applications:

- 1. If COLD is installed, run COLD preview to test it.
- 2. Test user applications on the server to verify that they run successfully.

Configuring FIPS mode - optional

The US Federal Information Processing Standard 140-2 (FIPS 140-2) is a validation program that defines security standards for validating cryptographic modules that encrypt user credentials (user name and password) between servers. If you do not want to configure FIPS mode, skip to the next section.

About this task

The cryptographic modules are certified through the National Institute of Standards and Technology (NIST). The IBM Tivoli group has built certified cryptographic libraries, which are now included with IBM FileNet Image Services.

FIPS mode controls which cryptographic modules will be used by FileNet Image Services. Enabling FIPS mode allows you to run FileNet Image Services in a FIPS compliant mode by using NIST certified cryptographic modules.

Configuring FIPS mode on your FileNet image Services system is optional. You can configure FIPS mode on your FileNet Image Services system now or at any time in the future. You can also turn off FIPS mode at any time.

For more information about FIPS 140-2 support, see the *IBM FileNet Image Services* System Administrator's Handbook.

Procedure

To configure FIPS mode on your server, perform the following steps from a Command Prompt window:

1. If the FileNet Image Services software is running, as the FileNet software user, stop it by entering:

initfnsw -y stop

2. Kill all remaining FileNet Image Services processes by entering:

killfnsw --DAy

The -D option kills FileNet daemons (such as TM_daemon). It can be specified if the TM_daemon process is to be terminated. Normally, this process stays running across initfnsw stop cycles, but on occasion, it is necessary to terminate TM_daemon as well.

The -A option removes all IPC segments.

The -y option automatically answers Yes to subsequent killfnsw prompts.

The killfnsw command also stops the IS ControlService on Windows servers.

3. Enter the following command at the system prompt:

convert2fips xxxx_xxxx

where xxxx_xxxx is one of the following FIPS modes:

FIPS_NONE – turn off FIPS encryption. This is the default mode.

FIPS_PREFERRED – use FIPS encryption unless the server is communicating with a server that does not have either FIPS_PREFERRED or FIPS_ONLY encryption configured.

FIPS_ONLY – use only FIPS compliant encryption. Rejects connections from other FileNet Image Services clients or servers that do not have FIPS compliant encryption supported and configured. FIPS_ONLY mode strictly enforces the use of FIPS compliant encryption between this server and any clients or other servers.

Your choice is stored in the Network Clearinghouse (NCH) database.

- Restart FileNet Image Services by entering: initfnsw start
- Verify the current FIPS mode by entering: convert2fips

Tip: You can determine the current FIPS mode at any time, even while FileNet Image Services is running, by entering the convert2fips command with no options.

Install fix packs (optional)

Install any fix packs that apply to this release of IBM FileNet Image Services. Perform the steps in this section on all servers.

Procedure

To install FileNet Image Services fix packs:

Read the accompanying README file, which contains the instructions for installing the software. Retrieve the latest fixes from the IBM Information Management support page at "ibm.com and related resources" on page v.

Re-enable Cron jobs

If you disabled any cron jobs at the beginning of this upgrade, you can re-enable them now.

Modify the inittab file

If you modified the /etc/inittab file at the beginning of this procedure, you can now edit the file again to remove the comment character. Removing the comment character enables the IBM FileNet Image Services software to start automatically whenever the server is restarted.

About this task

Perform the steps in this section on all servers.

Procedure

To modify the inittab file:

1. As a user with root privileges, change to the /etc directory by entering the following command:

cd /etc

- 2. Using your preferred editor, open and edit the inittab file.
- **3**. Locate and uncomment (remove the # symbol from) the line that is similar to the following example:

rcfn:234:wait:/bin/sh /etc/rc.initfnsw /dev/console> /dev/console2 >&1

4. Exit the file and save your changes.

Upgrading storage library servers and applications servers

Repeat these procedures to upgrade any additional storage library servers or application servers.

Procedure

To upgrade storage library servers and application servers:

- 1. If you have not already begun to upgrade any additional storage library servers or application servers, return toChapter 3, "Preparing for the upgrade," on page 9 and repeat these procedures for each server that needs to be upgraded.
- 2. When you have upgraded all the servers in your IBM FileNet Image Services system, continue with the next section.

Back up the system

After you have upgraded the root/index server and any other application or storage library servers, you should make a full system backup.

About this task

For complete information on making system backups see:

- IBM FileNet Image Services System Administrator's Companion for UNIX
- IBM FileNet Image Services Enterprise Backup and Restore User's Guide
- IBM FileNet Image Services Third-Party Backup/Restore Guidelines

To download these documents from the IBM support page, see "ibm.com and related resources" on page v.

The FileNet Image Services upgrade is complete

You have completed the IBM FileNet Image Services Upgrade procedure. You can now start FileNet Image Services and return to production mode.

About this task

After you have verified that FileNet Image Services and the RDBMS run successfully, you can remove the old versions of the software as long as no other applications are using them.

MKF database migration from raw partitions to file systems on UNIX servers

IBM FileNet Image Services now supports either file systems or raw partitions for its Multi-Keyed File (MKF) databases on UNIX servers.

File systems is the default for fresh installations. Existing FileNet Image Services users can choose to continue using raw partitions as before, or migrate to file systems. After your current UNIX-based FileNet Image Services server has been upgraded to FileNet Image Services version 4.2, you can optionally convert the MKF databases from raw partitions to file systems.

For complete information about migrating your MKF database, see the document *MKF Database Migration from Raw Partitions to File Systems on Unix Servers*. To

download this document from the IBM Support page, see"ibm.com and related resources" on page v.

Appendix A. Uninstalling FileNet Image Services

Uninstall the FileNet Image Services software from your server.

Procedure

To uninstall the FileNet Image Services software:

- 1. Verify that you are logged on with root privileges.
- 2. Stop the FileNet Image Services software.
- **3.** Back up any log files or other data in the /fnsw and /fnsw/local directories that you want to save.

Tip: Unless you specify otherwise, the uninstallation program uses the same mode that you used during the installation. For example, if you installed FileNet Image Services using Silent mode, the uninstallation program automatically defaults to Silent mode, too, even if you do not specify the **silent** option.

4. Change to the root directory and run the uninstallation program. The uninstallation program defaults to the same mode that you used for installation, unless you choose a different mode. Enter:

cd /

• Graphical mode

/fnsw/IS_uninstaller/uninstall_is.bin -i gui

Console mode

/fnsw/IS_uninstaller/uninstall_is.bin -i console

• Silent mode

```
/fnsw/IS_uninstaller/uninstall_is.bin -i silent
```

Important: You must use the uninstall_is.bin command to uninstall the FileNet Image Services software. You cannot use the operating system tools to remove FileNet Image Services.

Uninstalling FileNet Image Services also uninstalls the Tivoli GSKit modules from the /fnsw/lib/shobj/tiv directory. The Tivoli GSKIT contains cryptographic libraries that are used by FileNet Image Services to provide compliance with Federal Information Processing Standards (FIPS 140-2).

5. The uninstallation program leads you through the necessary steps and prompts you when it is finished.

Tip: The uninstallation program leaves certain critical directories intact to protect existing data.

6. After the uninstallation program has finished, go to the /fnsw directory and examine the remaining contents. Manually remove any unwanted files (such as the uninstall-output.txt file) and directories.

Appendix B. Installing FileNet Image Services in non-English Environments

IBM FileNet Image Services supports several languages for installation, configuration, error reporting, and indexing.

Refer to the *IBM FileNet Image Services System Administrator's Handbook* for setting the supported language preference for the operating system, databases, and the FileNet Image Services software.

Appendix C. Troubleshooting the installation program

If you encounter any problems during the IBM FileNet Image Services software installation, see the following problems and solutions for additional help.

Problem

Some of the FileNet Image Services files did not copy onto the server correctly.

Solution

Verify that all FileNet Image Services-related programs are shut down. /fnsw/client/bin/wal_purge

Then run the installation again.

Problem

On a Solaris server, NONE of the FileNet Image Services files are copied.

Solution

Make sure you have the latest Solaris patches installed. You can download the latest patch cluster from the SUN website. Install the patches, restart the server, and then run the installation again.

If the latest Solaris patches are already installed on the server, and you are installing the FileNet Image Services from CD-ROM media, the Volume Manager Daemon (**vold**) might be the cause. Whenever a CD is loaded, this daemon starts and automatically mounts the CD. However, **vold** might also interfere with the copying of files. Follow these steps to terminate and restart **vold**, and then run the installation:

- 1. Remove the FileNet Image Services media from the drive.
- 2. Terminate the **vold** process by entering:
 - kill -TERM ProcessID

Where *ProcessID* is the process ID of **vold**

- Restart the vold process by entering: vold &
- 4. Insert the software media into the drive.
- 5. Run the FileNet Image Services installation program again.

Problem

After I start the FileNet Image Services installation program on my server, I get this cryptic message:

Unable to load input file: /tmp/isj92q67a/jvm

Solution

You might be logged on as fnsw or some other user. The installation program must be run as the root user. Log on as root user and run the installation again.

Problem

In Graphical mode, the Welcome screen does not display.

Solution

Verify that the DISPLAY environment variable has been set correctly. If you used the su command to log on as root user, the *DISPLAY* variable might not be correct.

- Check the DISPLAY variable by entering: echo \$DISPLAY
- 2. Examine the *DISPLAY* setting. Verify that the variable is set to 0:0 to display on your local monitor. If you are installing FileNet Image Services remotely on another server, the *DISPLAY* variable on that server must be set to direct the display to the server you are working from.

Problem

The FileNet Image Services installation program cannot find enough temporary space to proceed with the installation. In Graphical mode, a message displays on the screen and is logged in the log file. In Silent mode, the installation program returns to the command prompt and no log file is created.

Solution

Locate another directory that has the amount of space you need. Then redirect the installation program to that directory by setting the *IATEMPDIR* environment variable to that alternate directory. The alternate temporary directory must be outside the /fnsw directory structure. For example, you might enter:

- In the Bourne shell: IATEMPDIR=/othertemp export IATEMPDIR
- In the Korn shell: export IATEMPDIR=/othertemp
- In the C shell: setenv IATEMPDIR /othertemp

Where */othertemp* is the full file path to the alternate temporary directory.

After you set the IATEMPDIR variable, run the installation program again.

Problem

When upgrading a clustered FileNet Image Services system to FileNet Image Services version 4.2, the configuration command fn_setup_rdb –u was run before all nodes of a clustered FileNet Image Services system were installed.

Solution

FileNet Image Services on a clustered node can encounter and log read errors regarding therdbup.bin and filenet.podf files. To correct the problem therdbup.bin file and the filenet.podf file (if it exists) must be restored to their old formats through the following steps before continuing upgrades of other nodes:

- Create the trigger file /fnsw/local/tmp/HOLD_CONVERSION. The trigger file is a touch file only. This file causes the creation of the rdbup.bin file to be written in a format prior to the FileNet Image Services version 4.2.
- Force the rdbup.bin file to be written by running Xdbconnect -r and entering the user password.
- Runfn_pso_encrypt_podf -p -o [full path of an output file]. Rename the current filenet.podf file in the /fnsw/local directory to a different name. Copy the specified output file over the filenet.podf file in the /fnsw/local directory.

Important: Data limits and sizes, including password lengths, have increased in FileNet Image Services version 4.2. Except for the case where files must be restored to a format before FileNet Image Services version 4.2, do not update the Programmable Security Objects (PSO) and RDB password data until after fn_setup_rdb -u has been run. This ensures the safe upgrade of the existing data.

Problem

The FileNet Image Services installation terminates with the following exception message:

This Application has Unexpectedly Quit: Invocation of this Java Application has caused an InvocationTargetException. This application will now exit. (LAX)

This error occurs because the *DISPLAY* environment variable might have been set to an empty string, which causes the installation program to default to console mode. For example, the following commands were run:

export DISPLAY

run <installer binary>

where the *<installer binary>* is the installation program file such as *./is_4.2.0_aix.bin*

Solution

Set the *DISPLAY* environment variable and then restart the installation program by doing the following steps:

1. Reset the *DISPLAY* environment variable by entering either of the following commands:

unset DISPLAY

or

- In the Bourne shell, enter: DISPLAY=<host_identifier>:0 export DISPLAY
- In the Korn shell, enter: export DISPLAY=host_identifier:0
- In the C shell, enter:
 - setenv DISPLAY host identifier:0

where *host_identifier* is the server identifier, either a name or an IP address.

2. Start the installation program in console mode by entering:

<installer binary> -i console

where *<installer binary>* is the installation program file such as *./is_4.2.0_aix.bin*.

Problem

On Solaris servers in console mode, the Choose Locale list does not correctly display language names that contain special characters because the locale is not correctly set. For example, the following messages are displayed:

```
# ./is_4.1.3_sun.bin -i console
Bad string <<<<<-----
Preparing to install...
Extracting the JRE from the installer archive...
Unpacking the JRE...
Extracting the installation resources from the installer archive...
Configuring the installer for this system's environment...</pre>
```

Launching installer...

Warning: Missing charsets in String to FontSet conversion <-----Warning: Missing charsets in String to FontSet conversion <-----Preparing CONSOLE Mode Installation...

Solution

The console installer locale is correctly displayed when the LANG environment variable is set to en_US.IS08859-1.

To set the LANG environment variable

- In the Bourne shell, enter: LANG=language export LANG
- In the Korn shell, enter: export LANG=language
- In the C shell, enter:
 - setenv LANG *language*

where *language* is the regional language (locale) in which you want your server to operate.

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This product incorporates technology covered by one or more of the following patents: U.S. Patent Numbers: 6,094,505; 5,768,416; 5,625,465; 5,369,508; 5,258,855.

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