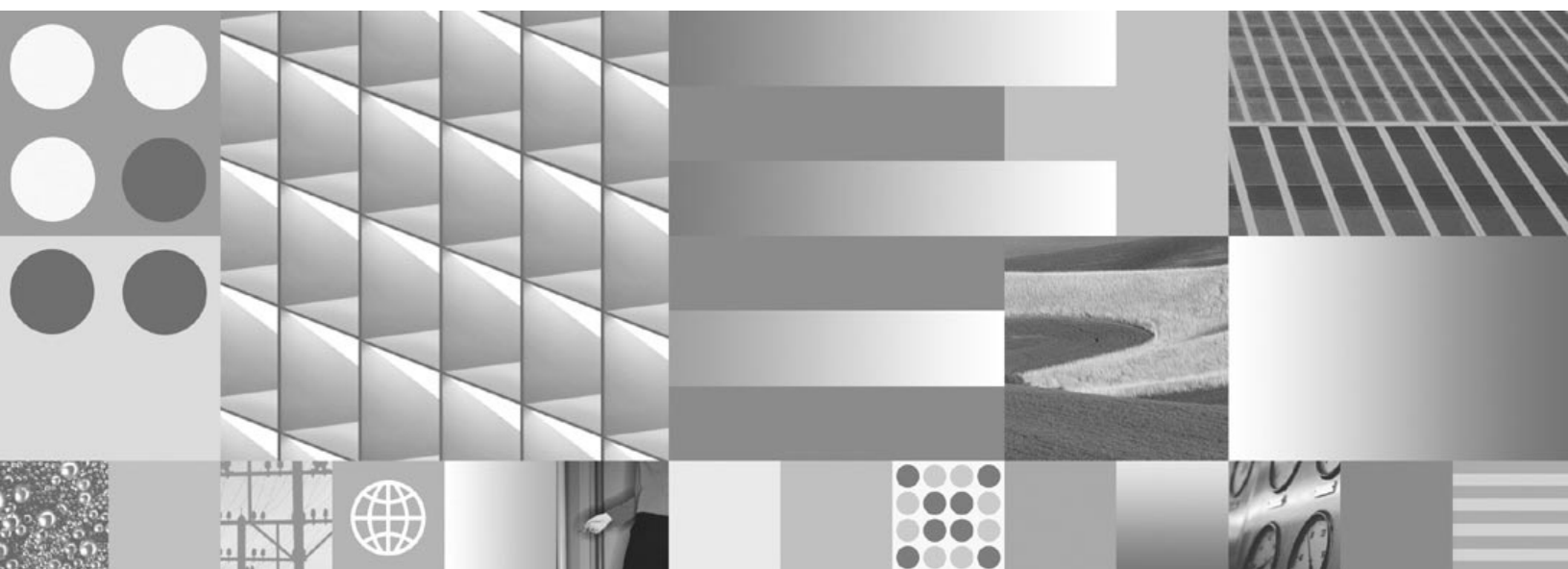


**Upgrade Procedure for Windows Server**





## **Upgrade Procedure for Windows Server**

**Note**

Before using this information and the product it supports, read the information in “Notices” on page 97.

This edition applies to version 4.1 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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# Getting Started

This document contains information for updating IBM® FileNet® Image Services, DB2®, Oracle and Microsoft® SQL Server™ software. Use these procedures to upgrade software on all Root/Index, Storage Library, or Application servers. If you are updating the FileNet software on a Dual server or multiple server system, upgrade the Root/Index server first and then upgrade the Storage Library or other servers.

## Document revision history

IS version	Date	Comment
4.1	June 2008	Documentation refresh. Added IS uninstall appendix.
4.1	Nov. 2007	Documentation refresh. Bluewashing. Added MSSQL 2005 information (IS 4.1.1).
4.1	June 2007	Initial release.

## Required Skills

Installation by a FileNet Certified Professional (FCP) is recommended. For more information about the FCP program, go to the IBM web site (<http://www.ibm.com>), Products > Software > Information Management > Training and certification > FileNet Certified Professional Program (FCP). You will need an IBM-issued login name and password to access the Web site.

If an FCP is used, at least **ten days** before the installation, the FCP should schedule the installation and review the list of current scheduling procedures.

The procedures included in this document assume that you are familiar with the following topics:

- Knowledge of the Windows® 2003 operating environment
- Knowledge of Windows 2003 network models
- Experience with Windows 2003 Administrative Tools
- DB2, Oracle or Microsoft SQL Server Database Administration

## Comments and Suggestions

Send any comments by e-mail to [comments@us.ibm.com](mailto:comments@us.ibm.com). Be sure to include the name of the product, the version number of the product, and the name and part number of the book (if applicable). If you are commenting on specific text, include the location of the text (for example, a chapter and section title, a table number, a page number, or a help topic title).

## New Features of the Image Services 4.1 Upgrade

This release of Image Services software includes the following major improvements and features.

### InstallShield Installer

This release of Image Services incorporates an InstallShield MultiPlatform Installer. Before upgrading the Image Services software, the Installer performs a series of system configuration checks to verify that the Windows server is ready for the Image Services installation. The Installer gives you two options:

- System Check only
- System Check and Install Image Services

If the Installer detects a problem at any point during the System Check, you can back up to the previous screen, correct the problem outside the installer and then go to the next screen to rerun the check again. The Windows server must pass the Installer System Check successfully before the Installer installs the Image Services software.

## **IBM DB2 Support**

This release of Image Services supports IBM DB2 Universal Database V8.1/V8.2. The DB2 databases are site-controlled and must reside on remote AIX 5.2/5.3 or Solaris 9/10 servers. See Guidelines for Installing and Configuring DB2 Software for more information.

## **Oracle 10g Database Software**

This release of Image Services includes support for Oracle Database 10g Standard or Enterprise Edition (32-bit). This applies to FileNet-controlled as well as site-controlled Oracle installations.

**Note** The Oracle media are not supplied by IBM.

---

The Database Administrators of Site-controlled Oracle installations should refer to the *Guidelines for Installing and Updating Site-Controlled Oracle and MS SQL Software on Windows Servers* for information they need to provide to the System Administrator and your service representative for this upgrade. To download the guidelines from the IBM support page, see **[“Accessing IBM FileNet documentation” on page 21.](#)**

## Microsoft SQL Server 2005 (IS 4.1.1 and later)

After you install Service Pack 1 on IS 4.1, MS SQL Server 2005 is supported.

---

**Note** Microsoft SQL Server software media are not supplied by IBM. If you want to use SQL Server 2005, you need to install SQL Server 2005 SP2 at a minimum.

---

Refer to the *Guidelines for Installing and Updating Site-Controlled Oracle and MS SQL Software on Windows Servers* for more informa-

tion. To download the guidelines from the IBM support page, see [\*\*“Accessing IBM FileNet documentation” on page 21.\*\*](#)

## New MKF Security Database Schema

Image Services 4.1 includes a schema change to the MKF Security database to provide for enhanced user security. For this schema upgrade to occur, specific MKF configuration changes must be made and software dependencies must be verified by your service representative before you install IS 4.1.

### **Important**

---

Please contact your service representative to schedule the MKF configuration changes for your IS system.

---

If you are upgrading from IS 4.0 SP5, your MKF Security database has already been upgraded.



## **SLAC Key Installation No Longer Required**

In past IS releases, you had to install a Software License Access Control (SLAC) Key that was included with the IS software. Beginning with IS 4.1, this key is installed automatically by the InstallShield Installer.

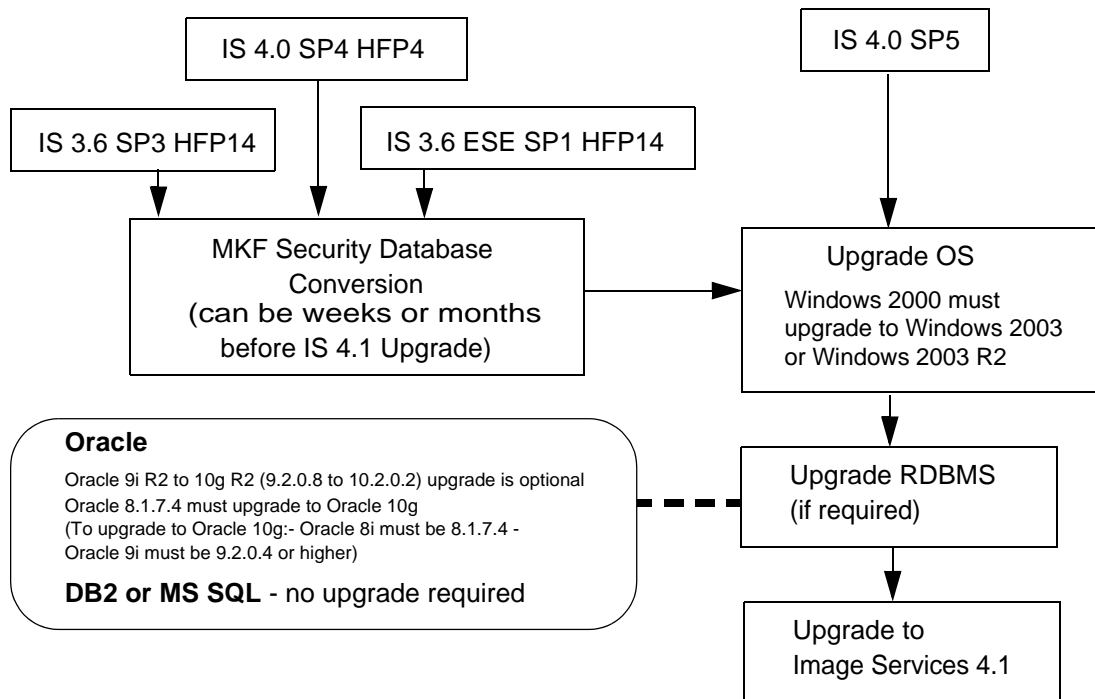
## Upgrade Paths

Because of the wide variety of possible system configurations, the following upgrade starting points have been tested and approved to simplify the upgrade process.

- IS 3.6 / Oracle 8i (8.1.7.4)
- IS 3.6 / MSSQL 2000
- IS 3.6 ESE / Oracle 8i (8.1.7.4)
- IS 3.6 ESE / MSSQL 2000
- IS 4.0 SP4 / Oracle 9i (9.2.0.4)
- IS 4.0 SP4 / DB2 8.1 FixPak12 or DB2 8.2 FixPak5
- IS 4.0 SP4 / MSSQL 2000
- IS 4.0 SP5 / Oracle 9i (9.2.0.4)
- IS 4.0 SP5 / DB2 8.1 FixPak12 / DB2 8.2 FixPak5
- IS 4.0 SP5 / MSSQL 2000

Verify that the server you're updating is at one of these starting points before you begin this upgrade to Image Services 4.1.

## Upgrade Paths



**Important**

If the server has a release of FileNet Image Services software prior to IS 3.6 (such as IDMIS 3.5.0), you need to upgrade to the most recent version of IS 3.6 before continuing with this procedure.

If the server has an Oracle release prior to 8.1.7.4, you must upgrade to Oracle 8.1.7.4 or higher before continuing with this procedure.

Oracle 8i servers must be upgraded to Oracle 10g R2. Upgrades to Oracle 9i are not supported.

Oracle 9i servers can remain at Oracle 9i or optionally upgrade to Oracle 10g R2.

---

## IBM Information Management Support

The latest information concerning your upgrade is available at the IBM Information Management support page at <http://www.ibm.com/software/data/support>.

Some of the documents that you can download from the IBM support page include the Release Notes for Image Services 4.1, the Release Dependency Spreadsheet, and the Operating System Notes.

### Accessing IBM FileNet documentation

To access documentation for IBM FileNet products:

- 1 Navigate to the Information Management support page ([www.ibm.com/software/data/support](http://www.ibm.com/software/data/support)).
- 2 Select the appropriate IBM FileNet product from the “Select a category” list.
- 3 From the Product Support page, click **Product Documentation** under Learn.

- 4 From the Product Documentation page
  - a If necessary, display the document list by clicking on the Doc link for the appropriate component product.
  - b Click the icon in the appropriate release column to access the document you need.

## Release Notes for Image Services 4.1

The Release Notes contain valuable information that you need to install and configure Image Services software. Do not start the upgrade without first reading the Release Notes.

---

**Note** If you are planning to upgrade an Image Services/Document Services Coexistence system, search through the Release Notes file for the latest information using the key words **IS/DS Coexistence**.

---

## Operating System Notes

Review the Operating System Notes for your current version of Windows to determine if any patches need to be installed prior to this Image Services update. The System Administrator is responsible for obtaining and installing these patches.

## Release Dependency Spreadsheet

Review the Release Dependency spreadsheet for information that might pertain to the entire system configuration. The Release Dependency spreadsheet contains software compatibility information for client workstations, fax servers, and printer servers.

You may see this spreadsheet referred to as the Support Matrix or the Compatibility/Dependency matrix.

## Upgrade Prerequisites

The prerequisites for updating Image Services software are included in the following sections. It is very important that you complete all prerequisite steps and gather all pertinent information. If you do not gather this information now, you will not be able to complete this upgrade procedure correctly.

## Minimum Hardware Requirements

---

**Note** These requirements have changed from previous Image Services releases and from previous versions of this document.

---

### Server Hardware

- Minimal Processor: 800Mhz Pentium® 32-bit processor
- 512 MB or more memory per CPU



**Tip** To check the amount of memory, logon on the server as **Administrator**. From the Command Prompt window, enter the **winmsd** command, click the *Memory...* tab, and look for the entry that says *Physical Memory Total*:

---

- An NTFS file system with the required amount of disk space as described in the Total Disk Space section below.

**Tip** To see how much disk space is available, use the *Windows Explorer*, and select the drive where you plan to install the Image Services software. The available disk (free) space appears in the message area at the bottom of the window. Refer to the *FileNet Disk Sizing Spreadsheet* for actual FileNet dataset sizes.

---

- A modem installed (and configured for operation) on your server
- An HP Optical Disk Library (optional)

**Note** Oracle9i and 10g software is compatible with 32-bit Windows servers.

---

- A DVD drive installed and configured for use on your Windows server.

## **Server Memory**

- Root/Index and Application Servers with Oracle:  
**9i/10g - 512 MB memory for each processor in the server.**
- Root/Index and Application Servers with DB2:  
**512 MB memory or more for each processor in the server.**
- Storage Library and Application Servers without Oracle:  
**512 MB memory or more for each processor in the server.**

## **Total Disk Space**

For FileNet software, minimum datasets:

- At least **1 GB**

These sizes include a 30% growth factor, but do not include space required for the Windows Operating System.

---

**Note** The Windows 2003 Operating System requires at least 3GB of disk space.

---

### Available File System Space for Image Services Software

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

- **500 MB** free space in \fnsw.
- **500 MB** free space in \fnsw\_loc

In addition, the Installer needs the following amount of temporary space for decompressing files:

- **500 MB** total space in temp

**Tip** If you don't have enough space in temp, you can direct the Installer to use another directory that does have enough space.

---

## Space for RDBMS Software

The amount of disk space required for RDBMS software depends on whether Server or Client software is installed and the products selected.

Refer to the *Guidelines for Installing and Updating Site-Controlled Oracle and MS SQL Software on Windows Servers* or *Guidelines for Installing and Configuring IBM DB2 Software* for additional information about space requirements for RDBMS software products. To download the guidelines from the IBM support page, see [\*\*“Accessing IBM FileNet documentation” on page 21.\*\*](#)

The FileNet SCouT system configuration and output tool can help estimate the actual amount of disk space needed for FileNet and RDBMS datasets on this Image Services system.

## Software Requirements

Your system must meet the following requirements to complete this Image Services software upgrade.

### Windows Operating System Software

The following Windows operating systems are supported with this release of Image Services software.

- Windows 2003 SP1 and SP2 (32-bit OS only)
- Windows 2003 Release 2 SP2 (32-bit OS only)

---

**Note** Upgrade to Windows 2003 **BEFORE** you upgrade the IS and RDBMS software.

---

### Image Services Software

- **Image Services 4.1 for Windows** (eSD image or software CD). This media contains the Image Services 4.1 software including COLD 4.1 software.

## IBM DB2 Universal Database Software

Refer to the *Guidelines for Installing and Configuring IBM DB2 Software* for more information. To download the guidelines from the IBM support page, see [\*\*“Accessing IBM FileNet documentation” on page 21.\*\*](#)

## Oracle RDBMS Software

---

**Note** Oracle 10g software media are not supplied by IBM.

---

Refer to the *Guidelines for Installing and Updating Site-Controlled Oracle and MS SQL Software on Windows Servers* for more information. To download the guidelines from the IBM support page, see [\*\*“Accessing IBM FileNet documentation” on page 21.\*\*](#)

## SQL RDBMS Software

---

**Note** SQL software media are not supplied by IBM.

---

Refer to the *Guidelines for Installing and Updating Site-Controlled Oracle and MS SQL Software on Windows Servers* for more information. To download the guidelines from the IBM support page, see **[“Accessing IBM FileNet documentation” on page 21.](#)**

## Debugger

The debugger program is required for Image Services 4.1. The debugger enables your service representative to troubleshoot both FileNet and Windows-related problems and must be installed on each Image Services server.

## Installations Running Content Services

If your system is running Content Services and IS software on the same server with Microsoft SQL Server, you must upgrade the Microsoft SQL and IS software first, in the order indicated in this document.

Only after updating the Microsoft SQL Server and IS software, should you upgrade the Content Services software.

## Related Documentation

This document references other documentation or Online Help. To download the documentation from the IBM support page, see [\*\*“Accessing IBM FileNet documentation” on page 21.\*\*](#)

---

**Note**

For information on Microsoft or Oracle products, refer to the documentation that came with your software.

---



## Preparing for the Upgrade

Before you begin the procedures in this document there are a few steps that must be taken to ensure a successful upgrade of the software.

Upgrade by a FileNet Certified Professional (FCP) is recommended. For more information on the FCP program, refer to the FileNet Web site (<http://www.filenet.com>), Customer Center > Education and Training > Certification Programs. If an FCP performs the upgrade, at least four weeks prior, your service representative will do the following:

- Schedule the update and review the list of current scheduling procedures.
- Copy the Image Services CDB file. Send this file to your service representative.

- Run spacerpt. Send the results to your service representative and keep a printed copy for comparison after the update is complete.

When you are instructed to send a file or output to your service representative, you can either e-mail the file or FTP the file, copy it to media, and mail the media to the service representative.

## Check Current Software Release

Before updating your software, check the current versions of the software you are currently running.

## Windows Operating System

You must be running Windows 2003 SP1 or SP2 or Windows 2003 Release 2 SP2 to run this release of Image Services software. If you are running Windows 2000, you must upgrade to the Windows 2003 or Windows 2003 SP1 Operating System **BEFORE** you update your RDBMS and IS software.

## FileNet and RDBMS Software

Check your current version of FileNet and RDBMS software to see if it can be updated with this document. To see what versions of software can be updated with this document, see **“Upgrade Paths” on page 18.**

To find out which Image Services software release is currently running on your system, open the FileNet System Configuration Editor and check the System Attributes tab.

To find out which RDBMS software release is currently running on your system, do the following:

- For Oracle, use the FileNet System Configuration Editor and check the Relational Databases tab, Oracle subtab.
- For DB2, use the FileNet System Configuration Editor and check the Relational Databases tab, DB2 subtab.

- For Microsoft SQL Server, click Start on the task bar and then click Programs. Microsoft SQL Server is in the Programs list and the SQL Server version number is in the title.

## Verify the System Serial Number

Use the **ssn** command to display the system serial number. At a Command Prompt, enter the following command:

**ssn**

### Important

---

The ssn is written onto all storage media and **must** be unique for each Image Services system. If you have more than one 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.

---

## Exit WAL Applications

If you are running any WAL applications, you must exit these applications before you continue with this upgrade procedure. Later in this

chapter you will need to stop the FileNet IS software, which clears WAL shared memory.

After you have exited all WAL applications, go to the next section.

## Perform System Backup

If you do not have a recent full backup of the FileNet system, especially the \fnsw and \fnsw\_loc file systems, you need to backup the system datasets onto cartridge tapes. Refer to your *Systems Administrator's Companion for Windows Server*, for complete information on performing a system backup. To download this document from the IBM support page, see [\*\*"Accessing IBM FileNet documentation" on page 21\*\*](#).

## Shutdown the FileNet Software

- 1 If you aren't already, logon as **fnsw**.
- 2 Open the FileNet Task Manager and Stop the FileNet software by clicking *STOP* in the Task Manager window.
- 3 Close the FileNet Task Manager.

## Update to Windows Operating System (If Necessary)

Only the Windows 2003 SP1 or SP2 and Windows 2003 Release 2 SP2 operating systems are supported in this release of Image Services software. If you are not running Windows 2003, you must update your operating system before you install the Relational Database software and FileNet Image Services software.

Refer to the Microsoft documentation and installation procedures to upgrade your operating system and install the required service pack.

**Tip**

---

You can download the service pack from: <http://www.microsoft.com/downloads/search.asp?>

---

# Updating Relational Database Software

## Server Types

---

Perform the steps in this section on these servers:

**Root/Index** server during a Dual server installation.

**Root/Index/Storage Library** server during a Combined server or Entry server installation.

**Application** server with WorkFlo Queue services or SQL services.

---

If you are configuring a Storage Library server or an Application server that does not require Oracle, skip to **Chapter 4, “Upgrading Image Services Software,” on page 44.**

**The Database Administrator** is responsible for installing the appropriate version of the Relational Database Management software.

Image Services on Windows servers supports three Relational Database Management Systems. Skip to the section for the one that is going to be installed on this FileNet Image Services system:

- [\*\*“Oracle 9i and Oracle 10g” on page 40\*\*](#)
- [\*\*“IBM DB2 V8.1 and V8.2” on page 41\*\*](#)
- [\*\*“MS SQL Server Software” on page 43\*\*](#)

## Oracle 9i and Oracle 10g

For information on updating Oracle RDBMS software, refer to the *Guidelines for Installing and Updating Site-Controlled Oracle and MS SQL Software on Windows Servers*. To download the guidelines from the IBM support page, see [\*\*“Accessing IBM FileNet documentation” on page 21.\*\*](#)

- If the Oracle software and datasets are going to reside on the local FileNet Image Services server, refer to **Chapter 2 “Installation Guidelines for Servers with local Oracle databases.”**



- The Database Administrator also has the option of installing Oracle software and datasets on a dedicated remote Oracle server. Refer to **Chapter 3, “Installations Guidelines for Remote Oracle Database Configurations”** for further information.

This Oracle Guidelines document can be given to the Database Administrator.

---

**CAUTION**

DO NOT start the Image Services software until after it has been upgraded and configured.

---

After this is done, you're ready to update the FileNet Image Services software. Continue with **Chapter 4, “Upgrading Image Services Software,” on page 44.**

## IBM DB2 V8.1 and V8.2

The **Database Administrator** is responsible for installing the DB2 software and creating the DB2 database for Image Services. For information on updating IBM DB2 Software, refer to the *Guidelines for Installing and Configuring IBM DB2 Software*. To download the guide-

---

lines from the IBM support page, see [\*\*“Accessing IBM FileNet documentation” on page 21\*\*](#).

- The **DB2 server** software must be installed on a dedicated remote AIX or Solaris server. Also, the DB2 database for Image Services must be created on the remote AIX or Solaris server. Refer to **Chapter 2**, “Guidelines for installing DB2 ESE V8 Server Software” for further information.
- The **DB2 client** software must be installed on the Windows Image Services server and linked to the remote DB2 database. Refer to **Chapter 3** “Guidelines for Installing DB2 V8 Client Software” for details.

The DB2 Guidelines document can be given to the Database Administrator.

### CAUTION

---

DO NOT start the Image Services software until after it has been upgraded and configured.

---

After this is done, you're ready to install the FileNet Image Services software. Continue with **Chapter 4, "Upgrading Image Services Software," on page 44.**

## MS SQL Server Software

After SQL has been successfully installed, you're ready to install the FileNet Image Services software.

### **CAUTION**

---

DO NOT start the Image Services software until after it has been upgraded and configured.

---

Continue with **Chapter 4, "Upgrading Image Services Software," on page 44.**

## Upgrading Image Services Software

This chapter contains procedures to update the Image Services Software. It assumes that compatible versions of the operating system the and relational database software have already been installed.

### Server Types

---

Perform the steps in this chapter on **all servers**.

---

This chapter covers the following issues that include:

- Updating FileNet Image Services software and fixes
- Setting file ownerships and permissions
- Performing additional relational database tasks

### Note

---

If you want to log in as a specific user to run the FileNet tools and software, add this user into the **fnadmin** and **fnop** groups.

---

## Load the Image Services Software

---

**Note** If you're running the update Installer from a network drive, skip to section, **"Run the IS Upgrade Installer" on page 45.**

---

- 1 Log on as the local Windows **Administrator**.
- 2 Load the **Image Services 4.1 for Windows Server** CD-ROM into the CD-ROM drive. In a few seconds, the *Image Services* Logo screen appears followed by the *Welcome to the FileNet Image Services Setup Program* message box.

---

**Note** COLD 4.1 is included on the Image Services eSD image or software CD. However, you must be licensed to use the COLD application.

---

## Run the IS Upgrade Installer

The IS Upgrade Installer performs two tasks.

- It runs a System Check to verify configuration prerequisites.

- It installs the Image Services software.

You can choose to run both, or just the System Check only.

---

**Note** The Image Services software can be running when performing only the System Check. To run both the System Check and the Upgrade Installer, the FileNet Image Services software must not be running.

---

The Installer 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_loc\logs\install\` directory.

---

**Note** COLD 4.1 is included on the Image Services eSD image or software CD. However, you must be licensed to use the COLD application.

---

## Launch the Image Services Installer

The Image Services Installer can be run in graphical, console or silent mode.

- Graphical mode is the default graphical interface and is described later in this section.
- Console mode interactively displays installation steps in DOS windows.
- Silent mode displays nothing on the screen while the installer is running. The user should review the Silent install log file for access to the progress and results of the installation.

- 1 For Silent Installation only,** locate the appropriate options.txt file on the eSD image or software CD. The options file contains standard responses to the installer's prompts. Copy the file to a local directory on your server. (You can rename it to something shorter, like **opt.txt**.) Use your preferred text editor to make any appropriate changes and save the file. The options and their default values are fully described in the file.

- 2 As the Windows Administrator, change to the directory where the IS software is located and launch the installer.

- In graphical mode

**is\_4.1.0\_win.exe**

- In console mode

**is\_4.1.0\_win.exe -console**

- In silent mode

**is\_4.1.0\_win.exe -silent -options <drive>:\tmp\opt.txt**

where \tmp\opt.txt is the location of the text file you modified in Step 1. Specify its full path on the command line. For example, "... -options C: \fnsw\_loc\tmp\opt.txt".

If you do not specify -options and the file path, the installer uses the standard defaults from the option.txt file.



---

**Note** If you run the System Check in silent mode, check the log file in \fnsw\_loc\logs\install\4.1.0 to determine the results. The name of the log file is IS\_4.1.0.log.

---

If you determined earlier that The \tmp directory does not have enough space, specify an alternate directory. Adding **-is:tempdir <directory>** to the command line overrides the default C:\Documents and Settings\Administrator\Local Settings\Temp directory, as long as the <directory> you specify already exists. This optional temporary directory must be outside the \fnsw directory structure. For example, you might enter:

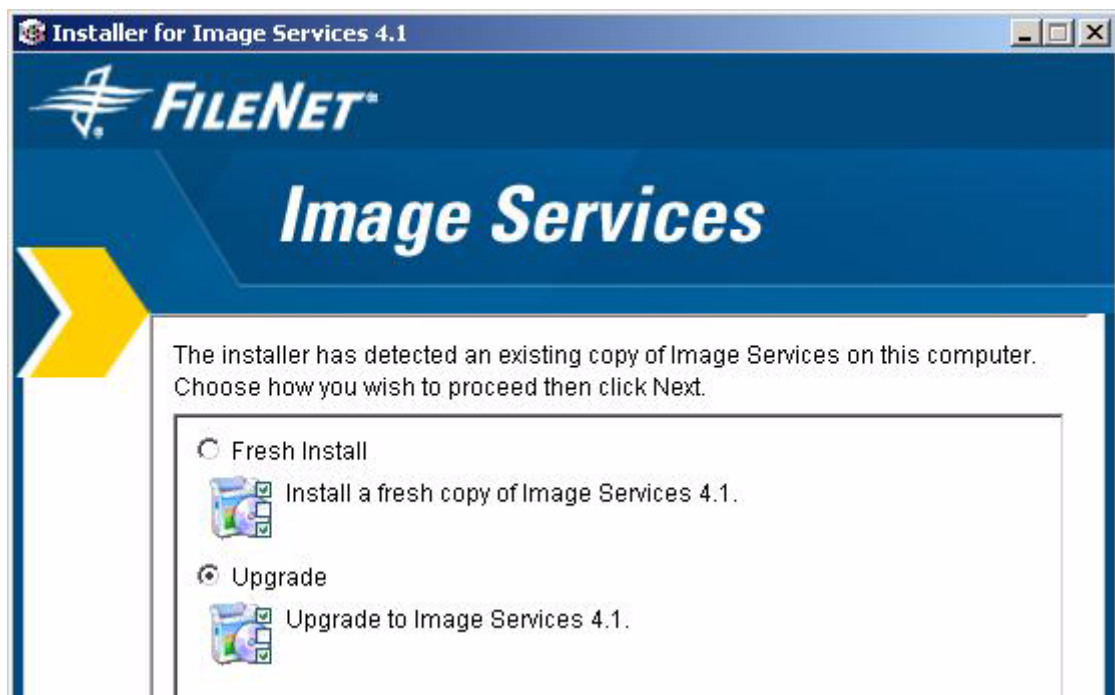
**is\_4.1.0\_win.exe -is:tempdir <drive>:\othertmp**

where <drive>:\othertmp is the specific temporary directory you want to use.

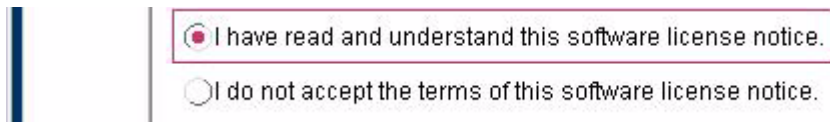
- 3 In graphical mode, you'll see the following screens. It might take a few minutes to display. In the meantime, a series of dots displays in the console window.

The following pages illustrate many, but not all of the screens.

- 4 The installer allows you to choose from a Fresh install or an Upgrade. Select the Upgrade option.



5 Take a moment to read the Notice to End Users.



☒ I have read and understand this software license notice.

☐ I do not accept the terms of this software license notice.

6 Select the parts of the Image Services Installation you want to perform. Run either the **System Check only** or the **System Check and Install Image Services**.



Select the parts of Image Services installation you wish to perform:

Image Services 4.1

☐ System Check only

☒ System Check and Install Image Services

The System Check option will perform the system checks required to install the Image Services software without installing the software.

Select the appropriate radio button and click **Next**.

**7** During the System Check, the Installer verifies the status of server characteristics in these categories:

- Hardware checks
- Operating System checks
- FileNet users and groups

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

- **Green** indicates the check has passed.
- **Yellow** indicates that the item has failed but the installer can continue
- **Red** indicates that a check has failed and the installer cannot continue

Some Installer System Checks produce only warnings while others prevent the installation of the Image Services software:

Condition	Severity
Not logged on as superuser	Will prevent install
Insufficient file system space	Will prevent install
Insufficient swap space	Warning only
Incompatible host name	Will prevent install
Incompatible O/S	Will prevent install
Missing debugger	Warning only
Kernel parameter out of range	Warning only
Missing FileNet user/group	Will prevent install
Incorrect FileNet user/group membership	Will prevent install
Image Services running	Will prevent install

## Hardware Checks

The first System Check screen displays:

- Free disk space
- Memory
- Swap Space

The Installer lists the resource, how much you need, how much you have, and either Pass or Fail.

If a configuration item, such as “insufficient file system space” or “kernel parameter out of range” does not pass the System Check, you can correct it while the Installer is still running.

- a In a separate window, make the necessary change.
- b Then, click the **Back** button on the Installer display to return to the previous screen, and click **Next** again to rerun the check.

**Free disk space:**

Resource	Needed	Found	Status
c:\fnsww	1050 MB	58424523 MB	Pass
c:\fnsww_loc	395 MB	(Combined) MB	Ignored
C:\DOCUME~1\ADMINI~1\LOCALS~1\Temp	355 MB	(Combined) MB	Ignored

**Memory:**

Resource	Needed	Found	Status
Memory	512 MB	2047 MB	Pass

**Swap space:**

Resource	Needed	Found	Status
Swap Space	1024 MB	4092 MB	Pass

Click **Next** to continue.

## Operating System Checks

The Operating System Checks screen displays:

- Host name
- O/S version
- Debugger
- Registry entries

As you scroll down the display you see the minimum and current kernel parameter settings.





**Kernel parameters:**

Resource	Needed	Found	Status
Max Logged On Users	10	Unlimited	Pass
Max Open Files	1024	16384	Pass
Max User Ports (Required for CFS-IS Only)	65535	65535	Pass
TCP Timed Wait Delay (Required for CFS-IS Only)	90	30	Ignored

**Tip** If any registries values (kernel parameters) fail the system check, click the **Back** button to return to the previous screen.

Enter the correct values.

Click **Next** on the installer screen to run the hardware check again.

---

## Finishing the System Check

When the System Check is complete it has either passed or failed.

If the System Check failed with errors, you must fix all the error conditions reported. You can then run the System Check again.

If the System Check passed all its tests, but generated warnings for the swap space, debugger, or kernel parameter tests, check the log file for additional items you need to correct.

If the Installer System Check completed successfully and if you selected the option to install Image Services software, the Installer continues with the section, **[“Upgrading to Image Services” on page 59.](#)**

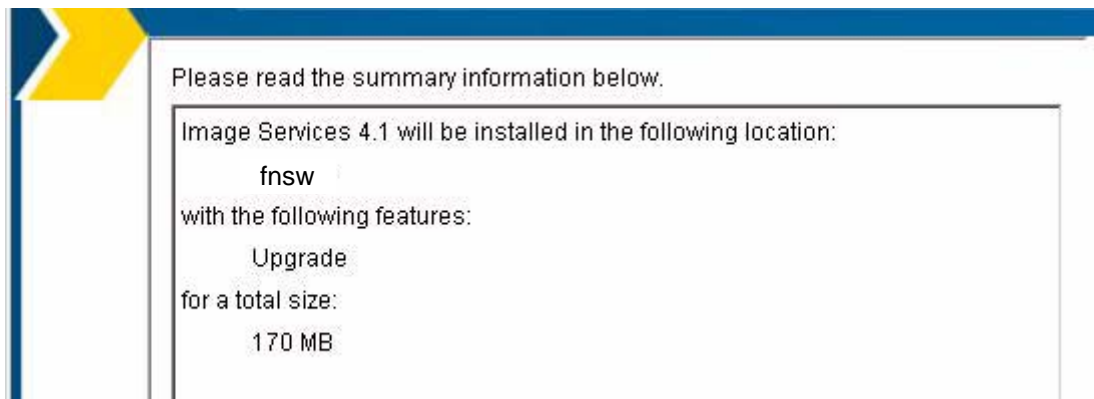
## Rerunning the Image Services Installer

If the Installer System Check does not pass, review the log file in the \fnsw\_loc\logs\install\4.1.0\ directory. The most recent information is appended to the end of this file.

After you have made the changes required by the Installer System Check, return to **“Launch the Image Services Installer” on page 47** and run the System Check again.

## Upgrading to Image Services

- 1 As the Image Services upgrade continues, the Summary screen displays. Verify that the information is correct for your system.

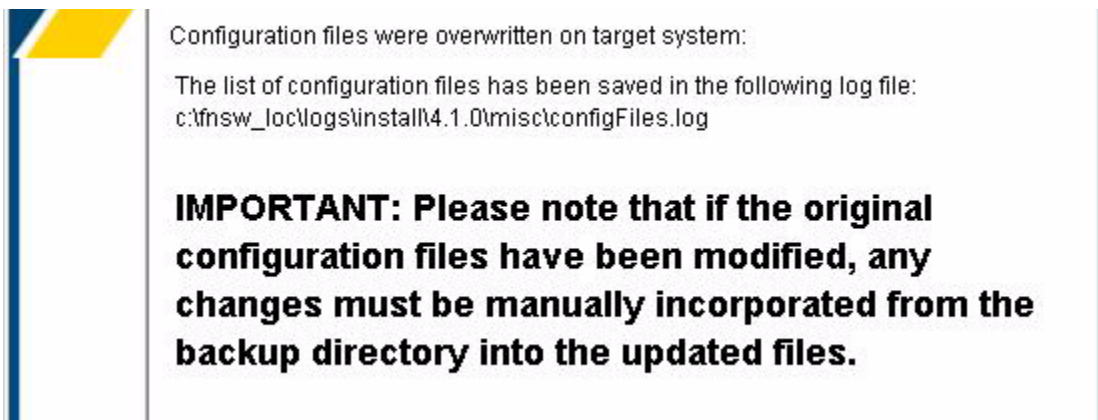


- 2 When the Image Services software installs, a progress bar displays.



Depending on your server's processor speed, expect the update to take approximately **20 minutes**. (If you're updating image Services on several servers simultaneously from the same location, it could take longer.)

- 3 When the software upgrade is finished, the following screen displays.



- 4 At this time, the upgrade installer creates an uninstaller, and then verifies the version information.

- 5 After a successful upgrade, the following screen displays.



- 6 The final screen prompts you to restart your computer so that the upgrade can take effect.

# 5

## Completing the Upgrade

This chapter contains procedures necessary to complete the update of your RDBMS software and/or bring up the FileNet software.

If you are updating Oracle see the *Guidelines for Installing and Updating Site-Controlled Oracle and MS SQL Software on Windows Servers*. To download the guidelines from the IBM support page, see [“Accessing IBM FileNet documentation” on page 21](#).

If you are updating from Microsoft SQL Server 7.0, continue to [“Completion Procedures for Microsoft SQL Server Systems” on page 67](#).

---

**Note**

If you are already running Microsoft SQLServer 2000 and **did not** need to update your SQL Server software, there are still procedures

that you need to complete in this chapter. Continue to [“\*\*Completion Procedures for Microsoft SQL Server Systems\*\*” on page 67.](#)

---

If you are updating an Application Server that does **not** have a relational database, such as a batch entry server, continue to [“\*\*Completion Procedures for Application Servers without a Relational Database\*\*” on page 68](#)

## Verify Performance Tuning Parameters

Follow the steps in this section to verify the performance tuning values.

- 1 If you have not already done so, logon as the FileNet software user, such as **fns**w.
- 2 Open the Configuration Editor.

From the *Taskbar*, click the *Start* button, point to *Programs*, point to the *FileNet Image Services*, point to *System Configuration*, and click the *Configuration Editor* icon.

- 3 Verify the domain name in the initial dialog box and click OK.



- 4 When the main System Configuration Editor window displays, click the Performance Tuning tab.
- 5 Select the Server Memory subtab and verify that the values match or exceed the recommended values shown in the table below:

Server Memory Fields	Minimum Value
Document Buffer Count	64
Document Buffer Size (KB)	256
Directory Buffer Count	16
Directory Buffer Size (KB)	64
Oracle Cache Size (MB)	100
Oracle Log Buffer Size (bytes)	163840
Permanent Pool Buffer Size (KB)	5000
Transient Pool Buffer Size (KB)	100000
Security Pool Buffer Size (KB)	4000
Max Shared Memory (MB)	2048

- 6 Now you can exit `fn_edit` by selecting Exit from the File pulldown menu and saving the changes.

## Update IS Configuration Files

---

**Note** If the IS system is configured with a Site-controlled relational database (on a local or on a remote database server), make sure that the relational database is up before running `fn_setup_rdb`.

---

As the FileNet software user such as **fnsw**, enter the following command to update the IS configuration files and RDBMS related files:

**`fn_setup_rdb -u`**

Follow the prompts to enter the requested information for your relational database.

# Completion Procedures for Microsoft SQL Server Systems

Perform the following procedures.

## Start the SQL Server Service

Besides starting the SQL Server service, this procedure will set (or verify) the start-up type is set to *Automatic*.

- 1 From Administrative Tools, locate and double-click the *Services* icon.

The Services dialog box appears.

- 2 Locate and double-click MSSQLServer service.

The MSSQLServer Properties dialog box opens.

- 3 If the Startup type is not set to *Automatic*, click the drop-down arrow and select *Automatic*; otherwise continue to the next step.
- 4 Click the *Start* button to start the MSSQLServer service, and click *OK*.

- 5 After the MSSQLServer service has been started close the Services dialog box.

## Completion Procedures for Application Servers without a Relational Database

Perform the following procedure **only** on an Application server that does not have a relational database. For example, an Application server with batch entry services.

- 1 If you are not already, logon as the FileNet user such as **fnsw**.
- 2 In a Command Prompt window, type the following command:

**fn\_build -a**

## Bring Up the FileNet Software

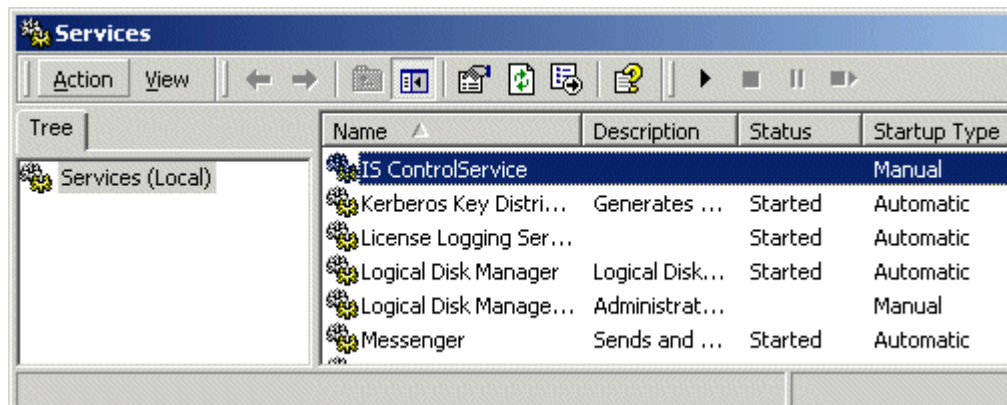
Follow these procedures to bring up the FileNet software.

### Set IS ControlService Start-up Mode to Automatic

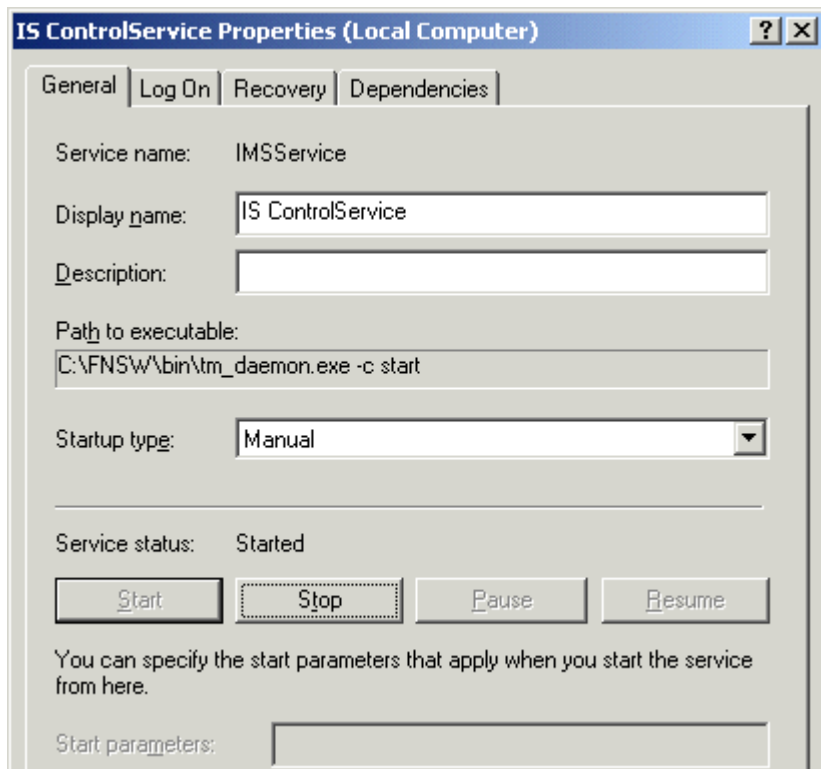
This procedure will set (or verify) the start-up mode is set to Automatic.

- 1 Open Administrative Tools and double click the *Services* icon.

The Services window opens.



- 2 Double-click the IS ControlService. The IS ControlService Properties dialog box opens.



- 3 In the IS ControlService Properties window, set the startup type to Automatic.
- 4 Close the Services window.

## **Start the FileNet Software**

- 1 From the Taskbar, open the FileNet Image Services Task Manager window.
- 2 Once you see the TM\_daemon.exe process message appear under the *Process* column, bring up the FileNet event log window.
  - Click the *Monitor* pull down menu and select the *Event Logs...* option.
- 3 From the Event Logs window, enable the event window to be refreshed whenever messages are logged.
  - Click the *Display* pull down menu and select the *Dynamic* option.



- 4** To bring up the FileNet software, return to the FileNet Task Manager window and click *Start*.

The system will display messages in the Current Status pop-up window as FileNet software is being started up.
- 5** When the FileNet software is up and the *Close* button is highlighted, click the *Close* button to close the Current Status window.
- 6** View the Event Log window to verify that there are no error messages.
- 7** After viewing the Event Log, chose *Exit* from the File menu to close the Event Log.

## Verify the \fns\etc\serverConfig File

The Installer handles the <drive>:\fns\etc\serverConfig file differently in the Image Services 4.1 release. Also, the processes that use the serverConfig file have been designed to search for a file named serverConfig.custom first, and if it does not exist to use the default serverConfig file.

When the Installer updates the serverConfig file, it copies your 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 Installer renames the temporary file to serverConfig.custom.
- If the contents of the two files are **identical** (except for the file stamps), the Installer removes the temporary serverConfig file, and the newly installed serverConfig file becomes the default.

To compare the serverConfig and serverConfig.custom files, open each file in a separate WordPad window.

## Install Remaining Fixes

You can now install the remaining fixes that apply to the Image Services 4.1 release. Read the README file on the Tech Info CD. You can also retrieve the latest fixes from the IBM Information Management support page ([www.ibm.com/software/data/support](http://www.ibm.com/software/data/support)). You will need an IBM-issued login name and password to access the Web site.

## Update Application/Storage Library Servers (if necessary)

If you have any application or storage library servers to update, return to [Chapter 1, “Getting Started,” on page 11](#) and repeat these procedures for each server that needs to be updated.

## Backup the System

After you have updated the root/index server and any other application or storage library servers, you should make a full system backup. Refer to your *System Administrator's Companion for Windows Server* for further information on performing a full system backup. To download this document from the IBM support page, see [“Accessing IBM FileNet documentation” on page 21](#).

## Return to Production Mode

Congratulations! The Image Services Update Procedure for Windows Server, Release 4.1, is now complete. You can return your system to production mode. If you are configuring an MSAR or SDS System, continue to the next section.

## MSAR and SDS Systems

The Magnetic Storage and Retrieval (MSAR) storage library is a new feature that was added to FileNet Image Services in release 3.6 ESE. It provides high speed and high capacity storage libraries on magnetic disk media instead of using optical media or large magnetic disk caches (Cache-only systems).

If you will be configuring and setting up an MSAR System, refer to the *MSAR Procedures and Guidelines* document for information. To download this document from the IBM support page, see **[“Accessing IBM FileNet documentation” on page 21.](#)**

# Appendix A – Microsoft Systems Management Server (SMS) Procedures

This appendix contains information for using the Microsoft Systems Management Server (SMS) Version 2.0 product for updating FileNet Image Services Software on your FileNet Image Services server(s). SMS Version 1.2 is *not* supported in this Image Services release.

---

**Note** Only a brief description of SMS is provided in this appendix. For detailed information or instructions, refer to the *Microsoft SMS documentation* and the *Readme* file that is contained on the FileNet *Image Services 4.1 for Windows Server* eSD image or software CD.

---

If you are updating the FileNet Image Services software on a Dual server system, update the Root/Index server first and then update the Storage Library server.

## What is Microsoft Systems Management Server (SMS)?

Microsoft Systems Management (SMS) is a Windows product designed to make it easier for you to centrally manage, support, and maintain a distributed network of computers. SMS is an integrated system that is part of the Microsoft BackOffice™ family of business products.

This appendix will only use the Software Distribution portion of the SMS product to update FileNet Image Services software. With SMS, you will be able to update software from a single, central location.

The basic structure of SMS utilizes a site server, which controls and distributes software to client servers that are part of the SMS system. The software contained on the FileNet Image Services release media is loaded onto the SMS site server and distributed to client servers from there.

## Overview

To use SMS to distribute and update software, a few basic steps must be performed.

**Note**

---

For detailed information, refer to the *Microsoft SMS documentation* and the *Readme* file that is contained on the FileNet *Image Services 4.1 for Windows Server* eSD image or software CD.

---

- Microsoft SMS software must be installed and setup on a server you designate as the **SMS Site Server**. This process enables you to create workstation packages which are necessary to distribute the software to individual Image Services (client) servers. Refer to your *SMS documentation* for information on setting up your SMS site server.
- FileNet Image Services provides a template Package Definition File (or PDF file) called IS.pdf. This file, which is located in the root directory of the eSD image or software CD, must also be installed on the SMS site server. Workstation packages for software distribution are created using the IS.pdf file.

- On the SMS site server, an advertisement must be created for each Image Services (client) server. Advertisements can be created for new installations, upgrades, or to uninstall software.



## Before You Begin

Before you begin the procedures in this appendix there are several software requirements that must be adhered to in order to successfully update your FileNet Image Services software. Refer to **“Software Requirements” on page 29** for a specified list of requirements.

## Setting up the SMS Site Server Package

This section contains procedures to setup packages on your SMS Site Server. It is from the SMS Site Server that you will execute jobs to upgrade the software on your client servers.

### Copy FileNet Image Services Software to Site Server

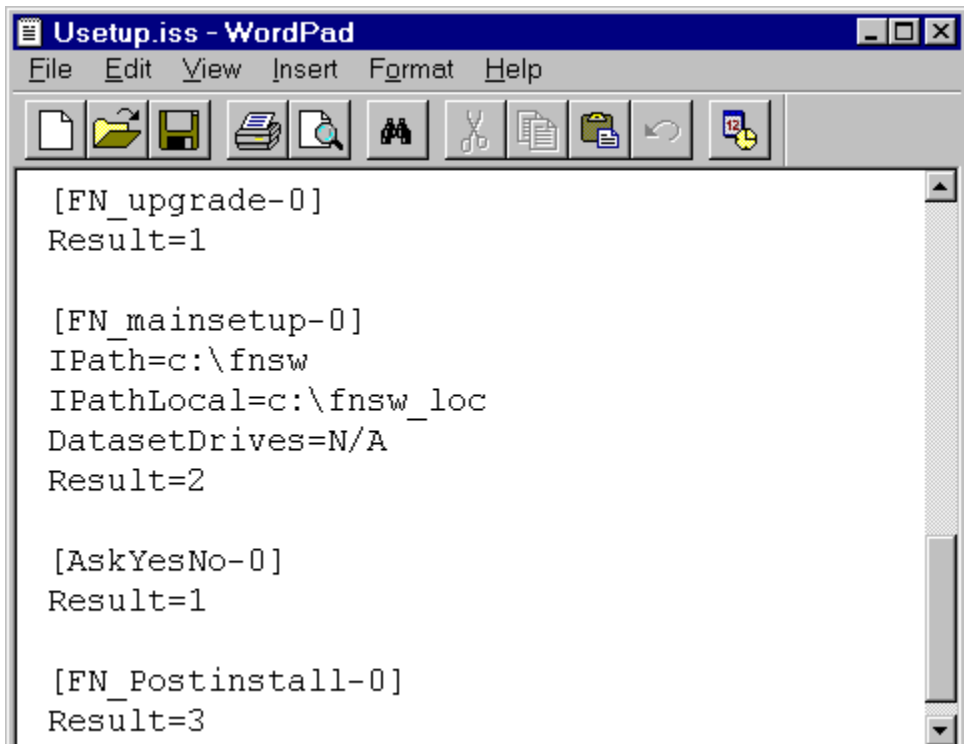
- 1 At your Site Server, logon as Windows **Administrator**
- 2 Create a directory folder on the Site Server drive where you want the Image Services software to reside. Name the folder, Image Services Software or something meaningful.
- 3 Load the **Image Services 4.1 for Windows Server** CD-ROM into the CD-ROM drive.
- 4 Copy the Image Services software from the CD to the directory location that you setup in step 2 above.

## Modify the Usetup.iss File

The Usetup.iss file must be edited for your system setup.

- 1 Open the directory where you copied the Image Services software and locate the Usetup.iss file.
- 2 Open the Usetup.iss file in Wordpad or Notepad.

A portion of this file is shown in the example below.



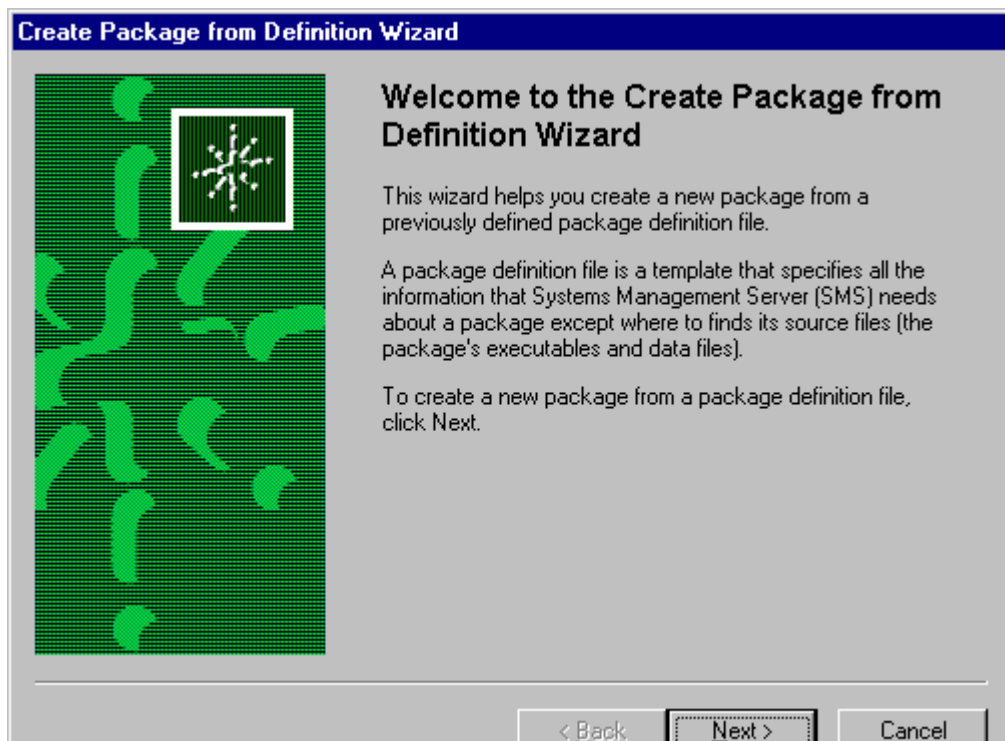
- 3 Locate the IPath= and IPathLocal= entries and change the drive letter **(c:)** to the drive letter on your Client Server where you want to install the FileNet software.
- 4 Rename the Usetup.iss file, setup.iss and save it.

## Create Package

This procedure will create a new package to upgrade your software.

- 1 At the SMS Site Server, click the *Start* button, point to *Programs*, point to the *Systems Management Server*, and click *SMS Administrator Console*. The *Systems Management Server\Site Database* window opens.
- 2 Double click on Site Database to expand it.
- 3 Select Packages and click the Action button. A drop-down list appears.
- 4 Click New and select *Package From Definition*.

The Create Package from Definition Installer opens.



- 5 Click *Next*.
- 6 In the next window, click on the Publisher drop-down list and select SMS 1.x PDF.
- 7 Click *Browse* and navigate to the location where you copied the Image Services 4.1 software to your local hard drive.
- 8 Select IMS.PDF and click *Open*.
- 9 Click *Next*.
- 10 In the Source Files window, choose the *Always obtain files from a source directory* radio button, and click *Next*.
- 11 In the Source Directory window, select the appropriate Source directory location radio button and enter the Source directory where the Image Services 4.1 media was copied. Then click *Next*.
- 12 When the Completing the Create Package from Definition Wizard window appears, click *Finish*.



## Configure the Distribution Points for Your Site

- 1 In the *Systems Management Server\Site Database* window, select *Packages\FileNet Image Services 4.1\Distribution Points*, and then click the **Action** button.
- 2 In the drop-down list that appears, select *New*.
- 3 Select *Distribution Points*. The New Distribution Points Wizard opens.
- 4 Check the box next to the name of the Distribution points, and click *Finish*.
- 5 In the *Systems Management Server\Site Database* window, open the Programs for the FileNet Image Services 4.1 package.
- 6 Right-click on *Upgrade Installation* and click *All Tasks*. The Distribute Software Wizard opens.
- 7 Click *Next*.

- 8 In the Package window, choose the *Distribute an existing package* radio button, select the package that you wish to distribute, and click *Next*.
- 9 In the Distribution Points window, confirm the name of the distribution points you selected earlier, and click *Next*.
- 10 In the Advertise a Program window, select the *Yes* radio button to advertise a program to a collection.
- 11 Select *Upgrade Installation in - - -* and click *Next*.
- 12 In the Advertisement Target window, select *Advertise the program - - -* or *Create a new collection - - -* as appropriate for your site. Then click *Next*.
- 13 In the Advertisement Name window, use the default name or enter an advertisement name and comment, and click *Next*.
- 14 In the Advertise to Subcollections window, select the appropriate radio button for your site and click *Next*.

- 15** In the Advertisement Schedule window, enter the schedule information as needed for your site, and click *Next*.
- 16** In the Assign Program window, enter the information appropriate for your site, and click *Next*.
- 17** When the Completing the Distribute Software Wizard window appears, click *Finish*.
- 18** Close the *Systems Management Server\Site Database* window.

## Updating FileNet Image Services Software

When the New Advertised Manager alerts you that a new Advertisement has arrived, follow this procedure to update the FileNet Image Services software.

- 1 At the client server, logon as **fns**.
- 2 Exit the Performance Monitor tool if it is currently running.

---

**Note** Stopping the Performance Monitor now will prevent you from having to cancel the update process to stop it later.


---

- 3 Open the Control Panel and double-click the Advertised Programs icon. The Advertised Programs Wizard opens.
- 4 Check the box next to the advertised program that you want to run, and click *Next*.
- 5 In the next window, enter the appropriate schedule information for when you want to run the program and click *Next*.

- 6 When the Completing the Advertised Programs Wizard window appears, click *Finish*.

---

#### Caution

The Advertisement Wizard icon, shown here , will appear at the far right side of the Task bar while the Advertisement Wizard is running. Do Not reboot your computer until this icon disappears. This may take approximately 15 minutes.

---

## Reboot the Server

After you finish updating the Image Services, you must reboot the server so that newly installed device drivers can take effect.

- 1 Reboot the server.

The time needed for the shutdown/reboot process varies for each system.

- 2 When the system restarts, logon as the FileNet software user, such as **fnsf**.
- 3 After logging on to the server, proceed to, **Chapter 5, “Completing the Upgrade,” on page 63** to continue.

# Appendix B – Uninstalling Image Services

To remove the Image Services software from your server, follow these steps:

- 1 Verify that you're logged on with **root** privileges.
- 2 Stop the Image Services software.
- 3 Back up any log files or other data in the \fnsf and \fnsf\_loc directories that you want to save.
- 4 Change to the root directory and run the uninstaller by entering:
  - Graphical mode – standard, graphical interface:  
**<drive>:\fnsf\etc\uninstaller\uninstall\_is.exe &**
  - Console mode – plain text interface:  
**<drive>:\fnsf\etc\uninstaller\uninstall\_is.exe -console**

- 
- Silent mode – no screen display:

**<drive>:\fns\etc\uninstaller\uninstall\_is.exe -silent**

---

**Important**

You must use the uninstall\_is.exe command if you decide to uninstall the Image Services software. You cannot use the Operating System tools to remove Image Services.

---

- 5** The uninstaller will lead you through the necessary steps and prompt you when finished.

---

**Note**

The uninstaller leaves certain critical directories intact to protect existing data.

---

- 6** After the uninstaller has finished, go to the \fns directory and examine the remaining contents. Manually remove any unwanted files and directories.



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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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