

Testing the Upgrade

Before upgrading a Docbase, create an environment in which to test the upgrade. To do this, copy the Docbase and upgrade that copy. After the upgraded copy is tested, upgrade the original Docbase.

Before you create the Docbase copy, complete these tasks:

Table 5-1. Precopying Tasks

Task	For More Information	Your Value/Completed?
Obtain the Docbase name		
Obtain the Docbase ID from the server.ini file		
Obtain the Docbase owner's name and password		
Create a database instance separate from the database instance used by the production Docbase	Consult your DBA.	
Obtain connection information for the alternative database instance	Your DBA and documentation for the database	
Identify a target host computer on which to create the Docbase copy		
Obtain the system or administrator user name and password for the database		
Note the drive on which the production Docbase resides.		

You can test the upgrade with or without copying the content files from the production Docbase to the copy. However, if you want to test operations involving the content files, you must copy the content files to the copy.

You must decide whether to create the copy on a drive equivalent to the drive on which the production Docbase resides. If the copy is on a different drive (for example, on drive D: rather than drive E:), there are additional steps you must perform.

After you have completed the tasks in Table 5-1, above, create the Docbase copy. The instructions below are high-level instructions, but they include crucial steps. To create the 4.2, 4.4, or 5.1 Docbase that becomes the copy, refer to *Installing Documentum eContent Server* version 4.2, 4.4, or 5.1 for complete installation instructions and to this manual for instructions on how to upgrade the copy to 5.2.

In the following instructions, the test Docbase is called the Docbase copy. Your original Docbase is called the production Docbase.

To copy a Docbase:

1. Shut down the production Docbase.
2. On the target host, create a new Docbase (the Docbase copy) of the same version number as the production Docbase.

Follow the instructions in *Installing Documentum eContent Server* version 4.2, 4.4, or 5.1, depending on the server version from which you are upgrading.

 - When you create the Docbase copy, ensure that you use the *same* Docbase name, Docbase ID, and Docbase owner name and password as the production Docbase.
 - Ensure that you use a *different* database instance from the instance used by the production Docbase and that you provide the correct connection information when you install.

For example, under Oracle the tnsnames.ora on the host where the Docbase copy resides should point to the Oracle instance used by the copy, not the instance used by the production Docbase.
 - Ensure that the Docbase copy projects to a DocBroker different from the DocBroker used by the production Docbase.
3. Apply to the Docbase copy any patches you applied to the production Docbase.
4. Connect to the database instance serving the production Docbase.
5. Using the database vendor's tools, export all objects owned by the Docbase owner and export the schema for the tables comprising the Docbase.
6. On the production Docbase host's file system, create a backup of the entire \$DOCUMENTUM/data/Docbase_name directory.

This is the directory containing the Docbase's content files.
7. Stop the Docbase copy.
8. Connect as the database system administrator to the database instance serving the Docbase copy.

For example, on Oracle, connect as the System account.
9. Destroy the existing tablespaces or database using the script in \$DOCUMENTUM/dba/config/Docbase_name/.
10. Remove the physical database file from the file system.

The name and location of the physical file are in the create_database script.
11. Create new tablespaces or databases for the Docbase copy using the script in \$DOCUMENTUM/dba/config/Docbase_name/
12. Import the database export taken from the production Docbase into the newly-create tablespaces or database.
13. Verify that the database tables have the correct value for the test system host name by checking the following values:
 - r_host_name in dm_server_config_s
 - host_name in dm_mount_point_s
 - target_server in dm_job_s
 - projection_targets in dm_server_config_r

14. Connect to the database serving the Docbase copy as the Docbase owner .
15. If any of the values in [Step 13](#) are incorrect, use SQL to correct the values.
16. Set the server to rebuild the Documentum views with this SQL statement:

```
update dm_type_s set views_valid=0
```
17. Copy the content file backup from the production Docbase to the file system of the Docbase copy.
18. Navigate to the DOCUMENTUM/dba/config/*docbase_name* directory and open the server.ini file in a text editor.
19. Ensure that the preserve_existing_types key in the SERVER_STARTUP section is set to TRUE:

```
preserve_existing_types=T
```
20. Save the server.ini file.
21. Start the server for the Docbase copy.
22. If the server and content files of the copy reside on a drive different from the drive used by the production Docbase (for example, drive D: instead of drive E:), use IDQL to update the file_system_path attribute of the dm_location and dm_mount_point objects to the new location:

```
update dm_location objects
set file_sysobject_path ='newpath' where file_system_path='old path'
update dm_mount_point objects
set file_system_path='newpath' where file_system_path='old path'
```
23. Deactivate all jobs by changing the is_inactive attribute on all job objects to TRUE.
24. Upgrade the Docbase copy to Content Server 5.2 and verify the upgrade.

How the Upgrade Affects Your System

Upgrading an existing installation has the following effects:

- Content Server is stopped and then restarted.
- Documentum type definitions are modified and new type definitions may be added.
- New dm_format objects are created in your Docbase.
- Some dm_format objects are updated.

If you modified any format objects, back up the changes before upgrading the Docbase, which overwrites any changes.

- Some system administration objects are created or modified.
- New directories are created.
- Creates or modifies the Desktop Client configuration objects, templates, and Docbase folders.
- All passwords are encrypted.
- On Windows, upgrading may affect the port on which a Docbase listens, if you are using Trusted Content Services and the next available port is not sequential.

Upgrading Content Server does not affect the content in the Docbase, which remains in the Docbase and requires no special migration.

Upgrading Distributed Configurations on Solaris

If you are upgrading a 4.2 multiserver distributed Docbase on Solaris, there are additional steps to perform before you upgrade.

Content Server uses a location object typically called `nls_chartrans` to locate the `unitrans.so` library. The actual name of the location object is stored in the `nls_location` attribute of the server config object. These instructions refer to the location object as the `unitrans` location object.

Before you upgrade, use IDQL to rename any `unitrans` location object that is not named `nls_chartrans`. For example, if a `unitrans` location object is named `nls_chartrans_munich`, you might rename it `nls_chartrans_munich_old`. The name does not matter.

Upgrading the Server Software Installation on the Host

Before upgrading Content Server, review the Content Server Release Notes, [Chapter 1, Planning for Server Installation](#), [Chapter 2, Database Requirements](#), and [Before You Upgrade, page 79](#).

The first part of the upgrade process copies files from the installation media to your hard disk.

To upgrade the software installation:

1. Log in to the host system using the installation owner account.
 - On Windows, use an account that is a member of the local Administrators group.
On Windows, user accounts are not case-sensitive, but Content Server installation fails if you connect to the host using the incorrect case in the user name. For example, if the account is set up as `JPSmith` and you connect as `jpsmith`, you can log in to the host, but server installation fails.
 - On UNIX, connect using an account that is a member of the Documentum and installation owner group.

To confirm the account's group membership, type the following at the command prompt:

Solaris:

```
% id -a
```

AIX and HP-UX:

```
% id
```

2. Shut down the Docbase.