Upgrading from TREX 6.0 SP0 to 6.0 SP1

Release TREX 6.0 SP1

Copyright

Icons

Icon	Meaning
⚠	Caution
💬	Example
💡	Note
🧭	Recommendation
SYN	Syntax

Typographic Conventions

Type Style	Description
Example text	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options.
	Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

Contents

Upgrading from TREX 6.0 SP0 to 6.0 SP1

Purpose

This guide describes how to carry out an upgrade from Retrieval and Classification (TREX) 6.0 SP0 to 6.0 SP1.

The guide is valid for all applications that use TREX (portal and non-portal environments). The target group of the guide consists of system administrators and consultants.

Implementation Considerations

Prerequisites for the Upgrade

You have installed at least TREX 6.0 SP0 patch 1. This corresponds to TREX version 6.0.0.1.x.

TREX and SAP Enterprise Portal

TREX 6.0 SP1 has been released for EP 5.0 SP6 and EP 6.0 SP1.

Note the following:

- Only the Windows version of TREX has been released for EP 5.0.

- Both the UNIX and Windows versions of TREX have been released for EP 6.0.

SAP Notes on Installation

Read the SAP Notes on installation before you begin. The SAP Notes contain current installation information and additions to the installation documentation.

Make sure that you use the current version of the SAP Note. You can find the SAP Notes in the SAP Service Marketplace (`http://service.sap.com/notes`) or in SAPNet → R/3 Frontend.

Relevant SAP Notes

SAP Note Number	Title
565347	TREX 6.0: Central Note
631390	TREX 6.0: Additional Languages
642112	Central Note Upgrade EP 6.0 SP0 to SP1

Upgrading on UNIX

Purpose

Use the table below as a checklist for the upgrade. Carry out the steps in the order specified.

Prerequisites

- You have installed at least TREX 6.0 SP0 patch 1. This corresponds to TREX version 6.0.0.1.x.

    To find out which TREX version is currently installed, see the file `<TREX_directory>\doc\TREXVersion.html`.

- You know which UNIX user was created especially for TREX. By default, this user is `trexadm`.

Process Flow

✔	Action
	Stop the TREX daemon [Page 7]
	Upgrade TREX [Page 7]
	Start the TREX daemon [Page 8]
	Copy the vpd.properties file to the TREX Directory [Page 9]
	Optional in a portal environment: Reindex documents [Page 10]

Stopping the TREX Daemon

Procedure

1. Log on to the installation host with the TREX user (by default `trexadm`).

2. Go to the TREX directory, and call up the `TREX` script using the `stop` option.

   ```
   cd <TREX_Directory>
   ```

   ```
   TREX stop
   ```

   > ⚠️
   >
   > Do not stop the TREX daemon using `kill -9`, and do not stop the individual child processes that the daemon has started. Doing so can lead to the loss of data. Affected indexes can be irreparably damaged.

Result

Certain processing steps, for example, writing an index, cannot be interrupted. Such steps are completed before TREX is stopped. Therefore, it can take a certain amount of time to stop TREX.

With large indexes, it can take up to a few hours to stop TREX if lots of documents are currently being indexed.

Upgrading TREX

Prerequisites

- You are logged on to the installation host with the TREX user (by default `trexadm`).

  > ⚠️
  >
  > Do **not** execute the installation as **root**.

- The `DISPLAY` variable is set for the TREX user.

- There is at least 800MB available in a temporary directory. The TREX setup program temporarily copies the installation files to the temporary directory and deletes them again when the installation is complete. The TREX setup program normally uses the temporary directory `/var/tmp`.

Procedure

1. Make sure that all of the TREX processes have stopped. In particular, check that the Web server (HTTP daemon) has stopped. You can use the following command to do this:

   ```
   ps -fu <TREX_User> | grep httpd
   ```

2. Mount the TREX CD.

   > 💡
   >
   > Mount the TREX CD locally.
   >
   > We recommend that you **not** use the Network File System (NFS).

3. Make sure that the executable flag (x flag) is set for the setup program: The setup program is:

   Sun Solaris: `<TREX_CD>/setupsolarisSparc.bin`

4. Start the setup program.

   Sun Solaris: **`<TREX_CD>/setupsolarisSparc.bin`**

   > If you want to use a temporary directory other than `/var/tmp,` start the setup program as follows:
   >
   > Sun Solaris: **`<TREX_CD>/setupsolarisSparc.bin -is:tempdir <your_temporary_directory>`**
   >
   > You have to have at least 800 MB available in your temporary directory.

   The setup program dialog box appears.

5. Choose *Next*.

   The setup program displays the directory in which the old TREX version is installed. Do not change this directory.

6. To start the installation, choose *Next*.

7. If the upgrade is successful, the setup program displays a message telling you so at the end of the upgrade. Choose *Finish*.

Starting the TREX Daemon

Prerequisites

You are logged on with the TREX user (by default `trexadm`).

Procedure

Go to the TREX directory, and call up the `TREX` script using the `start` option.

`cd <TREX_Directory>`

`TREX start`

Copying vpd.properties to the TREX Directory

Use

The TREX setup program enters the TREX components installed into the file `vpd.properties`. Whenever you upgrade TREX, the TREX setup program accesses the information in this file.

For security reasons, we recommend that you copy the file `vpd.properties` to the TREX directory **every time** you install or upgrade TREX.

Procedure

You find the file `vpd.properties` in the following location:

- On Windows, in the directory `C:\WINNT`

- On UNIX, in the home directory of the TREX user (by default `trexadm`)

Copy the file to the TREX directory.

Result

If problems occur during the installation or upgrade of TREX, TREX support can use this copy for troubleshooting.

> Other applications also enter information into the file `vpd.properties`. Therefore, never copy the file from the TREX directory to `C:\WINNT` or the home directory of the TREX user. If you do so, the functionality of other applications can be impaired. Only TREX support may use the copy in the TREX directory for troubleshooting.

Optional in a Portal Environment: Reindexing Documents

Use

TREX 6.0 SP1 provides the following new features, among others:

- Generating content snippets

- Generating HTML versions of documents

If you create an index with the new TREX release and then carry out an indexing run, content snippets and HTML versions are available automatically.

If you want to use content snippets and HTML versions for existing indexes, you have to carry out the following steps:

1. Change the index parameters in the configuration files `TREXIndexServer.ini and bartho.ini`.

   In a distributed TREX installation with index replication, you have to change the configuration files on the master and on all slaves.

2. Reindex the documents.

Prerequisites

You have updated the portal and Content Management to EP 5.0 SP6 or EP 6.0 SP1.

Changing Index Parameters in the Configuration Files

1. Stop the TREX daemon.

2. Edit the configuration file `<TREX_Directory>\TREXIndexServer.ini`. Add the line **`keep_content = yes`** to every index section.

   ```
   [index_marketing]
   use_precalculatedfeatures = no
   duplicatedetection = no
   keep_content = yes
   language = EN
   …
   [index_sports]
   use_precalculatedfeatures = no
   duplicatedetection = no
   keep_content = yes
   language = EN
   ...
   ```

3. Edit the configuration file `<TREX_Verzeichnis>\bartho.ini`. Make sure that every index section contains the line **delete_docs_after_optimize = no.**

```
[index_marketingDE]

...

language = DE

use_text_mining = yes

use_filter = yes

delete_docs_after_optimize = no

use_precalculatedfeatures = no

codepage = UTF8

...
```

4. Restart the TREX daemon.

Reindexing Documents

The reindexing process can take a long time if there are a lot of documents or if the documents are large. We recommend that you run the reindexing at night when the CPU load is low.

With EP 5.0

1. Log on to the portal as a user with the role KM Admin.

2. In the top-level navigation area, choose *KM Admin → Index Administration.*

3. Select all indexes and choose *Reindex.*

If you have large indexes, trigger the reindexing process for each index separately.

With EP 6.0

1. Log on to the portal as a user with the role of a system administrator.

2. In the top-level navigation area, choose *System Administration → System Configuration → Knowledge Management → Index Administration.*

3. Select all indexes and choose *Reindex.*

If you have large indexes, trigger the reindexing process for each index separately.

Upgrading on Windows

Use

Use the table below as a checklist for the upgrade. Carry out the steps in the order specified.

⚠️

If you have installed a distributed TREX system, carry out the upgrade on all hosts.

Prerequisites

You have installed at least TREX 6.0 SP0 patch 1. This corresponds to TREX version 6.0.0.1.x.

To find out which TREX version is currently installed, see the file
`<TREX_directory>\doc\TREXVersion.html`.

Process Flow

✔	Action
	Stop the TREX daemon [Page 12]
	Only portal environment: Stop the Web server [Page 13]
	Upgrade TREX [Page 13]
	Only portal environment: Update permissions for the TREX directory [Page 13]
	Start the TREX daemon [Page 14] Only for a distributed TREX installation: Start the TREX daemon in the following order: 1. On the name server 2. On all other hosts
	Only portal environment: Starting the Web server [Page 15]
	Copy the vpd.properties file to the TREX directory [Page 15]
	Optional in a portal environment: Reindex documents [Page 16]

Stopping the TREX Daemon

Procedure

Choose *Start → Programs → SAP TREX → TREX Service → Stop*.

Result

Certain processing steps, for example, writing an index, cannot be interrupted. Such steps are completed before the TREX daemon is stopped. Therefore, it can take a certain amount of time to stop the service.

With large indexes, it can take up to a few hours to stop the service if lots of documents are currently being indexed.

Only Portal Environment: Stopping the Web Server

Procedure

1. Choose *Start → Settings → Control Panel.* Then choose *Administrative Tools → Services.*

2. Use the secondary mouse button to click on *IIS Admin Service*.

3. Choose *Stop* from the context menu.

Upgrading TREX

Procedure

1. Log on to the installation host **with administrator permissions**.

2. Insert the new *TREX CD* into your CD drive.

3. Start the TREX setup program by executing

   `<TREX CD>:\setupW2k.exe`

   The setup program dialog box appears.

4. To start the installation, choose *Next*.

5. If the upgrade is successful, the setup program displays a message telling you so at the end of the upgrade. Choose *Finish*.

   ⚠️

   If you need to restart the host, the setup program displays a message telling you so. Restart the host before restarting TREX.

Only Portal Environment: Updating Permissions for TREX Directory

Use

You have to update the permissions for the TREX directory after the installation. The anonymous user entered on the Web server in the properties for the Web site `SAP_TREX` must have the permission Full Control for the contents of the TREX directory.

Background

When TREX was first installed, the Web site `SAP_TREX` was created on the Web server. This automatically determined a user that could be used to access the Web site anonymously. This anonymous user is called `IUSR_<name>` by default.

The anonymous user needs to have Full Control permission for the TREX directory. You ensured this using one of the following variants during the initial installation.

- Variant 1: You determined the anonymous user entered in the properties for the Web site `SAP_TREX`. You gave this user Full Control access to the TREX directory and to all contained files and sub-directories.

- Variant 2: You changed the access permissions for the TREX directory so that all users have Full Control access.

- Variant 3: You changed the anonymous user in the properties for the Web site `SAP_TREX`. Instead of using the default setting `IUSR_<name>`, you have entered a local user that has Full Control access for the TREX directory.

When you update TREX, the permissions remain for the TREX directory itself, but not for the contents of the directory. You have to transfer the permissions to the directory content again.

Procedure

1. Use the secondary mouse button to click on the TREX directory. Choose *Properties* → *Security*.

2. Select the appropriate entry according to which of the variants above you chose.

   o Variant 1: `Internet Guest Account (<hostname>\IUSR_<name>)`

   o Variant 2: `Everyone`

   o Variant 3: The local user that you entered in the properties of the Web site `SAP_TREX`

3. Make sure that the selected user/user group has the permission Full Control.

4. Choose *Advanced.*

5. Select the user/user group again.

6. Select *Allow inheritable permissions from parent to propagate to this object* and *Reset permissions on all child objects and enable propagation of inheritable permissions*.

7. Choose *OK* twice.

Starting the TREX Daemon

Prerequisites

If the TREX setup program told you to restart the host, you have done so.

Procedure

Choose *Start* → *Programs* → *SAP TREX* → *TREX Service* → *Start*.

Only Portal Environment: Starting the Web Server

Procedure

1. Choose *Start → Settings → Control Panel*. Then choose *Administrative Tools → Services*.

2. Use the secondary mouse button to click on *IIS Admin Service*.

3. Choose *Start* from the context menu.

If the Web server doesn't run even though you have started the service, start the Web server using a prompt.

1. Open a prompt.

2. Execute the following command:

    `net start w3svc`

Copying vpd.properties to the TREX Directory

Use

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For security reasons, we recommend that you copy the file `vpd.properties` to the TREX directory **every time** you install or upgrade TREX.

Procedure

You find the file `vpd.properties` in the following location:

*   On Windows, in the directory `C:\WINNT`

*   On UNIX, in the home directory of the TREX user (by default `trexadm`)

Copy the file to the TREX directory.

Result

If problems occur during the installation or upgrade of TREX, TREX support can use this copy for troubleshooting.

> Other applications also enter information into the file `vpd.properties`. Therefore, never copy the file from the TREX directory to `C:\WINNT` or the home directory of the TREX user. If you do so, the functionality of other applications can be impaired. Only TREX support may use the copy in the TREX directory for troubleshooting.

Optional in a Portal Environment: Reindexing Documents

Use

TREX 6.0 SP1 provides the following new features, among others:

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1. Change the index parameters in the configuration files `TREXIndexServer.ini and bartho.ini.`

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Prerequisites

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   keep_content = yes
   language = EN
   …
   [index_sports]
   use_precalculatedfeatures = no
   duplicatedetection = no
   keep_content = yes
   language = EN
   ...
   ```

3. Edit the configuration file `<TREX_Verzeichnis>\bartho.ini`. Make sure that every index section contains the line **delete_docs_after_optimize = no.**

```
[index_marketingDE]

...

language = DE

use_text_mining = yes

use_filter = yes

delete_docs_after_optimize = no

use_precalculatedfeatures = no

codepage = UTF8

...
```

4. Restart the TREX daemon.

Reindexing Documents

The reindexing process can take a long time if there are a lot of documents or if the documents are large. We recommend that you run the reindexing at night when the CPU load is low.

With EP 5.0

1. Log on to the portal as a user with the role KM Admin.

2. In the top-level navigation area, choose *KM Admin → Index Administration.*

3. Select all indexes and choose *Reindex.*

If you have large indexes, trigger the reindexing process for each index separately.

With EP 6.0

1. Log on to the portal as a user with the role of a system administrator.

2. In the top-level navigation area, choose *System Administration → System Configuration → Knowledge Management → Index Administration.*

3. Select all indexes and choose *Reindex.*

If you have large indexes, trigger the reindexing process for each index separately.