



Jive Interactive Intranet

## **9.x Administrator Guide**

### **Upgrade Guide**

# Notices

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For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)

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# Table of Contents

<b>Aurea global support.....</b>	<b>5</b>
<b>Chapter 1: Upgrading.....</b>	<b>6</b>
Preparing for upgrade to 9.0.7.1 or later.....	6
Preparing for upgrade from 7.0.x or 8.0.x .....	8
Preparing for upgrade from version earlier than 7.0.....	9
Upgrades that cause Search index rebuilds.....	11
Database upgrades.....	11
Creating test environment for upgrading.....	12
Upgrading Jive package.....	12
Upgrading custom themes and templates.....	15

# Aurea global support

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If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please, try to:

- Search the articles on the [Aurea Knowledge Base](#) for solutions to your issues.
- Search the product documentation and other product-related information that are also available on [Support Central](#).

If you still cannot find a solution, open a ticket on [Aurea Support Central](#). Information about the support organization is available on [Support Portal](#) as well.

You can also find the setup files on [Support Portal](#).

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our [website](#).

# 1

## Upgrading

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### Important notes

- Some Jive modules you've purchased have their own system and installation requirements; refer to the separate documentation for each module. The latest versions of Jive-supported plugins are available in [Jive Extensions Catalog](#) on Worx.
- Jive Software supports upgrades from Jive version 4.5 and later.
- The instructions in this section assume you've already installed the application on the target host. If you haven't, use the installation instructions to do so. For more information, see [Installing](#).

*This section includes information about upgrading the application.*

For details, see the following topics:

- [Preparing for upgrade to 9.0.7.1 or later](#)
- [Preparing for upgrade from 7.0.x or 8.0.x](#)
- [Preparing for upgrade from version earlier than 7.0](#)
- [Upgrades that cause Search index rebuilds](#)
- [Database upgrades](#)
- [Creating test environment for upgrading](#)
- [Upgrading Jive package](#)
- [Upgrading custom themes and templates](#)

## Preparing for upgrade to 9.0.7.1 or later

If you are upgrading to 9.0.7.1 or later from an earlier version, you must take these steps before you start the upgrade to make sure the upgrade is successful.

You can upgrade to Jive 9.0 from Jive 7.0.x and Jive 8.0.x only. If you have a version of Jive from before Jive 7.0, you need to upgrade to Jive 7.0 or Jive 8.0 first before upgrading to Jive 9.0. For information on what's changed from 7 or 8 to 9.0, see [Learn What's Changed from Jive 7 & 8 to Jive 9 on Worx at https://community.aurea.com/docs/DOC-206932](https://community.aurea.com/docs/DOC-206932).

If you are upgrading from an earlier version, see [Preparing for upgrade from version earlier than 7.0](#) on page 9. If you are upgrading to a version earlier than 9.0.7.1, see [Preparing for upgrade from 7.0.x or 8.0.x](#) on page 8.

## Set the system parameters

1. Set the `jive.cookies.secure` system property to `true` or `false`.

When the property is set to `true`, it means the cookie will only be transferred over HTTPS. When it is set to `false`, the cookie will be transferred even on HTTP. If this property is not set, you will not be able to login to the Admin Console after the upgrade.

2. Delete the value for the `jive.master.encryption.key.node` system property. The value will be automatically repopulated after the upgrade.

Not deleting the value of this system property may cause issues if you run the Jive upgrade on a node that was not defined as the master node previously. You should also verify that this property is deleted from all nodes.

For more information about Jive system properties, see [Fine-tuning with system properties](#).

## Back up your `jiveHome` directory

The `jiveHome` directory contains important information about your environment. The database connection information is stored there, as well as logs, cached attachments, your license file, and the local system database files (if used). You should back up this directory before upgrading.

## Back up your database

You should back up your database before you upgrade. For now, the best way to manage database backups is to follow the recommendations of your DBA or the recommendations of your database software. There are a number of tools built into various databases. Here are a couple of examples:

- MySQL: Use the `mysqldump` tool
- Postgres: Use the `pg_dump` tool

## Decide if you want historical analytics data

If you want to carry forward historical data for the User-to-User Interactions chart for Jive Analytics, then set the `jive.cmr.summarize.interactions.import.history.enabled` system property to `true` before upgrading. For more information, see [System properties reference](#).

## Remove plugins before upgrading

Before starting your upgrade, you should remove all the plugins you have installed. For those plugins that aren't compatible with the version you're upgrading to, you need to separately upgrade your plugin code (or get upgraded versions of the plugins from their developer), then install the upgraded versions after you've completed your Jive upgrade.

For more on managing plugins, see [Customizing with plugins](#).

## Allow time for search index rebuilding

We recommend that you first test the upgrade on a test instance to determine how long the search index rebuild will take. In some cases, it may take days to rebuild the index, depending on the size and activity of the community. Communities with large amounts of content and activity should allow adequate time for the search index rebuild before deploying an upgrade to production.

For more information on creating a test instance, see [Creating test environment for upgrading](#) on page 12.

## Preparing for upgrade from 7.0.x or 8.0.x

Before you upgrade your instance, take the steps described here, such as backing up important data, to help ensure that your upgrade is successful.

You can upgrade to Jive 9.0 from Jive 7.0.x and Jive 8.0.x only. If you have a version of Jive from before Jive 7.0, you need to upgrade to Jive 7.0 or Jive 8.0 first before upgrading to Jive 9.0. For information on what's changed from 7 or 8 to 9.0, see [Learn What's Changed from Jive 7 & 8 to Jive 9 on Worx at https://community.aurea.com/docs/DOC-206932](https://community.aurea.com/docs/DOC-206932).

If you are upgrading to 9.0.7.1 or later version, see [Preparing for upgrade to 9.0.7.1 or later](#) on page 6.

If you are upgrading from an earlier version, see [Preparing for upgrade from version earlier than 7.0](#) on page 9.

### Back up your `jiveHome` directory

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Before starting your upgrade, you should remove all the plugins you have installed. For those plugins that aren't compatible with the version you're upgrading to, you need to separately upgrade your plugin code (or get upgraded versions of the plugins from their developer), then install the upgraded versions after you've completed your Jive upgrade.

For more on managing plugins, see [Customizing with plugins](#).

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For more information on creating a test instance, see [Creating test environment for upgrading](#) on page 12.

# Preparing for upgrade from version earlier than 7.0

If you have a version of Jive from before Jive 7.0, you need to upgrade to Jive 7.0 or Jive 8.0 first before upgrading to Jive 9.0.

You can upgrade to Jive 9.0 from Jive 7.0.x and Jive 8.0.x only. If you have a version of Jive from before Jive 7.0, you need to upgrade to Jive 7.0 or Jive 8.0 first before upgrading to Jive 9.0. For information on what's changed from 7 or 8 to 9.0, see Learn What's Changed from Jive 7 & 8 to Jive 9 on Worx at <https://community.aurea.com/docs/DOC-206932>.

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**Caution:** You must be upgrading from version 4.5.0 or later.

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For preparations for upgrade from 7.0.x or 8.0.x instance to 9.0.x, see [Preparing for upgrade from 7.0.x or 8.0.x](#) on page 8.

## For 5.0 and 6.0 upgrades, prepare for the new Jive CLI installer and interface

The following list will help you prepare for upgrading from pre-7.0 releases.

The CLI installer introduces the following changes, discussed in detail below:

- Jive started enforcing a strict policy on HTTPS certificate checking
- You can use `jive setup` to move your existing configurations into the new unified format
- HTTPD now runs on 8080, which is a non-privileged port

For the overview of the CLI installer, see [CLI installer overview](#).

## Jive now enforces a strict policy on HTTPS certificate checking

Jive now enforces a strict policy on HTTPS certificate checking, and will not accept self-signed certificates without you adding them to the application Java keystore. If you are upgrading from Jive 6.0.3 and earlier, and you encounter communication errors between the self-signed application and the Jive server, you need to add the certificate to the Java keystore.

For more information on SSL Support, see [Installing and Configuring SSL Support in the Oracle Help Center at `http://docs.oracle.com/javase/1.4/tutorial/doc/Security6.html`](http://docs.oracle.com/javase/1.4/tutorial/doc/Security6.html).

Here's an example of how to install a certificate:

1. Download the certificate from the server and save the resulting certificate to a file called `sam.cert`:

```
openssl s_client -connect yourserver.example.com:443 -showcerts > sam.cert
```

2. Import the certificate into the local keystore on the Jive server:

```
/usr/local/jive/java/jre/bin/keytool -import -alias jiveSamCert -file sam.cert  
-keystore /usr/local/jive/java/jre/lib/security/cacerts
```

## Use `jive setup` to move your existing configurations into new unified format

It is required to move your existing startup configurations into the new unified format. Using the `jive setup` command provides specific suggestions for how to do this. You should allow some time during your upgrade for going through these suggestions. As with all upgrades, it is best practice to test on a staging instance first.

## HTTPD now runs on 8080, which is a non-privileged port

Remember that the jive-managed Apache HTTPD service now must run on a non-privileged port, which is port `8080` by default. You can use the following instructions to make modifications with or without a load balancer:

### Production site with a load balancer

Change your load balancer's configuration to point to each web app node's port `8080` instead of port `80`.

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**Note:** Note that SSL is now required on a load balancer.

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### Upgrading a single-node test instance without a load balancer

Modify the `jiveURL` in the Admin Console before you upgrade by going to **Admin Console: System > Management > System Properties** and modifying the `jiveURL` system property.

For example, if your test instance's `jiveURL` was previously set to `http://communitytest.mycompany.com`, set it instead to `http://communitytest.mycompany.com:8080`.

After you made the necessary modifications, you can continue the upgrade.

### For pre-6.0 upgrades, add a node for On-Premise Search (optional)

If you're upgrading from a version prior to 6.0 and you have chosen to implement On-Premise search instead of Cloud Search, you need to add a node for the Search service. Make sure it meets the requirements specified in [Hardware requirements](#). For more information on available Search services, see [Understanding Jive Search](#).

### For pre-5.0 upgrades, add an Activity Engine node and database

If you're upgrading from a version prior to 5.0, you need to add a node and database for the Activity Engine. For more information, see [Setting up Activity Engine](#) and [Setting up new databases](#) before you begin upgrading.

## Upgrades that cause Search index rebuilds

Knowing which upgrades cause the Content or User Search, or both indexes to rebuild may help you better plan your upgrade.

The following list tells you which versions of Jive require a Search index rebuild, which can take a significant amount of time for large data sets.

Upgrade path	Does Jive force a Search index rebuild?
5.x to 6.x	Yes. Jive forces both the Content and User Indexes to rebuild.
6.0.0 to 6.0.1	No
6.0.1 to 6.0.2+	Yes. Jive forces only the Content Index to rebuild.
6.x to 7.x	Yes. Jive forces both the Content and User Indexes to rebuild.
Any version to 8.x	Yes. Jive forces both the Content and User Indexes to rebuild.

## Database upgrades

You need to upgrade your database when you upgrade the rest of the installation.

For more information about database upgrades, see [Upgrading databases](#). You may want to review the rest of the best practices in [Database configuration and best practices](#), especially if you are moving to a new database platform.

## Creating test environment for upgrading

If you are upgrading an existing instance of Jive, we strongly recommend you create a test environment for the new version before migrating your current database.

The following instructions assume that your application name is `sbs` and you are using a Postgres database.

1. Dump the production database and copy it to your target server.

```
pg_dump sbs -Fc -O -U postgres > sbs_prod.dmp
```

2. Re-create the target database.

```
createdb sbs -E UTF-8 -O sbs -U postgres
```

3. Restore the database from production into the target.

```
pg_restore -d sbs -O -x -i -U sbs < /home/your_name/sbs_prod.dmp
```

4. Log into the database and override all of the email addresses to prevent spamming. We strongly recommend disabling email so that your Jive test instance does not spam users with email.

```
update jiveuser set email = username || 'discard@localhost';
```

5. Start the target app server.

6. Rebuild the user and main search indexes at **Admin Console: System > Settings > Search > Index Tasks** .

7. Update the `jiveURL` system property at **Admin Console: System > Management > System Properties** .

8. Change or disable the Email Monitor at **Admin Console: System > Settings > Email Server > Incoming Email** .

9. Change the Analytics database settings, if applicable.

10. Change your SSO settings, if applicable.

11. Change your video keys, if applicable.

## Upgrading Jive package

With a new Jive package distribution, you can upgrade your existing package.

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**Note:** Before you upgrade, uninstall all your plugins. You need to re-install them via the Admin Console after you have successfully upgraded.

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### Requirements

- Your existing installation of the Jive package
- The new Jive package you're upgrading to

- SSH access to the host computer so you can copy the package there for installation.
- Ability to become the root user on the host where the installation is performed, commonly via SSH

## Upgrading Jive package

For more information about the commands, see [Installing Jive package and starting up](#).

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**Note:** Executing the `rpm` command to upgrade the package automatically stops Jive applications. The application is started again at the end of the upgrade.

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1. Familiarize yourself with the system requirements, important information about software, hardware, and network requirements and recommendations, described in [System requirements](#).
2. Prepare for upgrade by performing the relevant steps, as described in the following articles depending on your application version:
  - [Preparing for upgrade to 9.0.7.1 or later](#) on page 6
  - [Preparing for upgrade from 7.0.x or 8.0.x](#) on page 8
  - [Preparing for upgrade from version earlier than 7.0](#) on page 9

3. Remove all plugins from your existing instance.

Note that you'll need to re-install them after you've successfully upgraded. For more information, see [Customizing with plugins](#).

4. Remove custom WARs and fixpacks that might exist as provided by support.
5. If you are upgrading from a version later than 5.0, if possible, pull the web application servers from the load balancing pool to prevent new activity coming in. Make sure your Activity Engine queues are drained to zero. You can see the queues in the Admin Console, on the **System > Settings > Activity Engine** page. Note that versions before 5.0 do not use an Activity Engine.
6. As the `jive` user, stop Jive services on all of the nodes, beginning with the web application nodes, and stopping the cache services last.

```
jive stop
```

---

**Note:** You can run `jive status -v` to see all of the services and whether they're enabled or disabled.

---

7. Review backup and storage considerations for more on what you should be backing up, as described in [Backup and storage considerations](#). If you are also upgrading the database, see [Upgrading databases](#).
8. From the command line, access the target host as root. For example, the following illustrates using the `ssh` command to access the server at `targethost` as the root user.

```
joe@joesbox ~ $ ssh root@targetsystem
root@targethost's password:
Last login: Mon Feb 14 14:00:56 2011 from joesbox.example.com
```

9. If you haven't already copied the Jive application RPM to each server and application node in your Jive environment, then you should do it now.

Here's an example using the Linux `scp` command to copy the package from a computer named `joesbox` to a target system at `targetsystem`:

```
scp -v joe@joesbox:/Users/joe/jive.rpm root@targetsystem:/root
```

10. Upgrade the Jive application RPM on all nodes by using an `rpm` command such as the following. The `U`, `h`, and `v` options are provided to indicate install or upgrade with hash indicators, and to be verbose during the installation. If you have multiple cache servers in your configuration, you need to upgrade all cache servers in the cluster.

```
rpm -Uvh jive.rpm
```

Your copy of the Jive RPM file — here, `jive.rpm` — will have a slightly different name.

All elements of the application are upgraded, including cache services and, if you have it, Document Conversion services. The following shows console output for a successful upgrade using the preceding command.

```
[root@targethost ~]# rpm -Uvh jive.rpm
Preparing... ##### [100%]
Stopping httpd: running stop command..stopped
Stopping webapp: running stop command.....sending SIGTERM.stopped
Stopping search: sending SIGTERM..stopped
Stopping doconverter: sending SIGTERM.....stopped
Stopping cache: sending SIGTERM..stopped
Stopping eae: sending SIGTERM.stopped
Writing upgrade version.
Wrote upgrade version.
Pre-install tasks complete.
 1:jive_sbs ##### [100%]
Removing unused files...
...done.
Fixing permissions..
...done.
Fixing symlinks...
...done.
Installing init script and logrotate...
...done.
*****
*** Post-install tasks complete! To configure the Jive platform,
*** become the jive user and run 'jive setup'.
*****
```

11. If the RPM output shows that any `.rpmnew` or `.rpmsave` files were written during the upgrade, merge those changes as required.
12. Run `jive setup` as the `jive` user on all nodes. For more information, see [Using jive setup](#). Do this so that the Jive CLI installer can detect any service-specific startup properties that need to be set:

```
jive setup
```

13. Once you get the `setup ok` message on all nodes, you can start the enabled services on all nodes **except the web application nodes**. For example, start services on the Cache nodes first, and then on the Activity Engine, Search, Ingress Replicator, and Document Conversion nodes.

```
jive start
```

14. Run `jive start` on one of the Web Application nodes as the Jive installation user.

15. With a supported web browser, go to `http://hostname:8080`, where `hostname` is the DNS-resolvable name of the server of the Web Application node you're using to upgrade. Once there, proceed with the upgrade by using the Admin Console.
16. After you've finished the upgrade, log into the Web Application node you used for the upgrade tasks and restart the application.  

```
jive restart
```
17. If you are upgrading to the 9.0.7.1 or later, copy the files from the `applications/sbs/home/crypto/*` directory in WebApp1 (Node 1), then paste them to the same directory in all other nodes.  
  
To support FIPS compliant encryption, the upgrade is converting the old crypto key files into a new format. You need to copy the new keys to all nodes.
18. Start the `webapp` and `httpd` services on all other webapp nodes.  

```
jive start
```

  
You're finished upgrading and should perform post-upgrades tasks.
19. Re-install your plugins.
20. If you had any custom themes and templates, see [Upgrading custom themes and templates](#) on page 15.

## Upgrading custom themes and templates

For each customized theme and template, you should run a comparison against core and update your themes and templates accordingly.

In the comparison, current core version is on the left, new version is on the right, and customized version is in the middle.

1. Upgrade your existing Jive instance, as described in [Upgrading Jive package](#) on page 12.
2. Copy your production themes to the target server. Your themes are located in `/usr/local/jive/applications/sbs/home/themes`.
3. Copy your production templates to the target server. Your templates are located in `/usr/local/jive/applications/sbs/home/templates`.
4. For each customized theme and template, run a comparison against core  
  
For example, you can use DiffMerge that is a useful tool for performing a 3-way diff against core. Usually in DiffMerge, the current core version is on the left, the new version is on the right, and the customized version is in the middle.
5. Merge from the right all differences between the old and new core themes and templates, keeping your custom modifications.