

# Tridion Docs Content Manager upgrade guide

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***Tridion Docs Content Manager 15.0.0***

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# 1

## **Welcome to Content Manager Upgrade Guide**

This document presents a description of all needed checks and actions necessary for an upgrade from the previous version of Content Manager to the latest version.

## Customer support

To contact Technical Support, connect to the Customer Support Web Portal at <https://gateway.sdl.com> and log a case for your RWS product. You need an account to log a case. If you do not have an account, contact your company's RWS Support Account Administrator.

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## **Upgrading Content Manager**

These steps apply to Content Manager upgrade specifically.

The details provided in this chapter apply to an upgrade of the Content Manager application only, in a situation when the database system and the operating system are not upgraded.

The earliest version from which you can upgrade to the current Content Manager version is Content Manager 13.0.0. To upgrade from an earlier version, you must first upgrade to Content Manager 13.0.0 (and perform the post-upgrade operations).

## Upgrade preparation

The pre-upgrade tasks are essentially a backup and uninstallation of the old Content Manager version. You should always make a complete backup of both project and database before upgrading so you can restore to the current environment if necessary.

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### Note:

- Before beginning the upgrade it is recommended that you warn all users that the system will be temporarily unavailable.
  - No updates should be allowed beyond this point in time.
  - You should plan to copy the whole of the Content Manager environment to a secure destination.
  - The whole of the Content Manager environment includes all Content Manager websites, Content Manager website components, the Full Text Collection, the database backup(s), and the Content Manager registry keys.
  - Identify and plan to backup any custom files and information in the same way.
  - Remember all Trisoft COM+ Applications and all Virtual Directories will have to be removed as well.
- 

## Backing up the project

This backup operation makes a copy of everything installed and generated in this project.

### About this task

This does a backup of the business components and used configuration and makes a full copy of:

- the Full Text Collection
  - all PublishService, ImportService, ExportService generated data
  - all generated logging
- 

**Note:** This backup can take a lot of time. You can do an initial clean up of all data that needs no backup or do a manual backup of the necessary files and settings.

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**Procedure**

1. Login to the Windows system as the **Administrator** user or a user with Administrator privileges (a user in the Administrator group).
2. In Windows Explorer, go to  
`C:\ISHCD\yyyymmdd.CD.InfoShare<version_num>.ProjectName.IT\__InstallTool`
3. Locate and double-click on **InstallTool.exe**.
4. Select the backup option.
5. Select the project that you want to backup and a location where you can safely store everything.

## Backup the database

Follow the procedure to backup the Microsoft SQL Server or Oracle RDBMs database based on your current configuration.

**Note:** The complexity of the Oracle backup is much greater than that of the SQL Server. The SQL Server algorithm is described by its Windows UI. The Oracle procedure is explained by command line tools so that it is valid for both a Windows and UNIX environment).

## Backing up Microsoft SQL Server

Follow this procedure to backup your SQLServer.

**Procedure**

1. Open **SQL Server Management Studio**.
2. Open the **Databases** folder.
3. Right click on your database
4. Select **Tasks > Back Up**.
5. **Backup type** should be **Full**.
6. Enter a **Name** for the backup.  
 It is recommended that you use the format: `yyyymmdd.projectname.bak` to name the backup.
7. Ensure that **Backup set will expire: After 0 days**
8. In the **Destination** pane at the bottom of the window, click **Add**.
9. Add a destination folder such as: `yyyymmdd.projectname\SQLServer\Dump`.
10. Click **Options** in the left pane and verify that the information is accurate:
  - Backup to the existing media set.
  - Append to the existing backup set.
  - Verify backup when finished.
11. Click **OK**.  
 The backup of the database starts.

### Backing up Oracle RDBMs

The description makes use of command line programs so that a person with a mixture of Windows and UNIX knowledge can follow the procedure on any Oracle hosting machine.

This procedure guides a knowledgeable person through the configuration so that no important steps are forgotten. However, it does not provide an explanations, or all the options for each step.

The procedure includes suggestions about how to do the steps. It is out of scope of this document to give a step-by-step explanation on basic Oracle maintenance. An Oracle DBA can choose any option desired, as long as an exact restoration of the Content Manager environment can be made.

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#### Note:

- The description refers to a Windows environment concerning system variables and file paths.
  - The default database name is ISH.
  - The procedure is different depending on the Oracle version you will import back in.
- 

### Backing up the closed data files

You can just make a copy of closed data files. This action applies to cases when you are not planning to change the location of the files, the character set or the Oracle version, so you won't need to perform a complete export.

#### Procedure

1. For making a copy of closed data files, open a command line window and set the ORACLE\_SID and ORACLE\_HOME environment variables. For example, on Windows:

```
set ORACLE_SID=ISH
set ORACLE_HOME=C:\Oracle\Product\<version>\db_1
```

2. Start SQLPLUS /NOLOG:

```
SQLPLUS /NOLOG
```

3. Force a database to close by typing the following. The goal is to do this quickly enough so that no-one can make a connection and alter the database, ensuring that you copy a stable file version.

```
shutdown abort
startup open
shutdown normal
```

All pending connections are closed by force. The **startup open** checks the database and the **shutdown normal** closes all database files.

## Exporting for an Oracle database

A full database export is the way to go when you need to be independent from version, character set or location. Exporting from the previous Oracle version for importing to the latest supported version requires a specific procedure.

### Procedure

1. Copy the file `expdp.par` from `C:\ISHCD\yyyymmdd.CD.InfoShare<version_num>.ProjectName.IT\Database\InfoShareCM\Common\Oracle\expdp` to the dump directory (`DATA_PUMP_DIR`) on the database server.

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**Note:** The dump directory should be in the line of `C:\Oracle\admin\<DatabaseName>\dpdump`.

---

2. Goto the database server.
3. Adapt the file names for the `DUMPFILE` and `LOGFILE` in the `expdp.par` file.
4. Open a command prompt.
5. Set `ORACLE_SID`: `ORACLE_SID=ISH`
6. Set `ORACLE_HOME`:
  - Oracle 12.1: `ORACLE_HOME=C:\oracle\product\12.1.0\dbhome_1`
  - Oracle 12.2: `ORACLE_HOME=C:\oracle\product\12.2.0\dbhome_1`
  - Oracle 19: the location where you copied the application.

---

**Note:** All commands must be entered in the same window, ensuring that every environment variable set is available throughout the process. The next steps presume that you use the same shell with these variables set correctly.

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7. Start `sqlplus` as `sysdba`
8. Check if there is a dump directory `DATA_PUMP_DIR`

```
SELECT directory_path FROM dba_directories WHERE directory_name = 'DATA_PUMP_DIR';
```

9. Make sure the dedicated `isource` database user has read and write access to the directory

```
GRANT read, write ON DIRECTORY data_pump_dir TO isource;
```

10. Exit `SQLPlus`, it gets you back at the command prompt
11. Execute the following command

```
expdp parfile="C:\Oracle\admin\<DatabaseName>\dpdump\expdp.par"
```

12. Provide the user name and password for the dedicated `isource` database user.  
The dump file is exported in the dump directory, you can import it back after you have uninstalled the old version of Content Manager.

## Uninstalling Content Manager

Removal of all Content Manager items of the installed environment is required before starting an upgrade.

### Before you begin

In the context of a Content Manager install or uninstall operation, before you run InstallTool you need to make sure the Microsoft Distributed Transaction Coordinator MSDTC service is running.

### About this task

All items which were installed and in the `installplan.xml` are removed from your system. Items which are not removed are:

- the Full Text Collection,
- all PublishService, ImportService, ExportService generated data,
- all generated logging,
- files that have changed after the initial installation (such as configuration files).

### Procedure

1. Login to your Windows system as the **Administrator** user or a user with Administrator privileges (a user in the Administrator group).
2. In Windows Explorer, go to the location where the previous installation software is located, or to the CD that was used to install the current environment, to access the correct version of the tool for uninstalling the software. Go to:

```
C:\IshCD\yyyymmdd.CD.InfoShare<version_num>.ProjectName.IT\__InstallTool
```

3. Locate and double-click on **InstallTool.exe**.
4. Select the uninstall option.
5. Select the project that you want to remove.
6. Uninstall.

---

**Note:** If the tool ends with errors you can find extensive info in `installtool.log`.

---

7. After the uninstall have completed, check that no Trisoft COM+ application remained in **Component Services > Computers > My Computer > COM+ Applications**. Remove remaining applications having a name starting with Trisoft-, if any.

## Installing the Content Manager server

You must install and configure the application and web server to use the Content Manager application, allowing you to connect to the repository.

Most of the Content Manager server installation process is automated. At the end of the process, some options must be set manually.

Be sure to check the installation requirements before initiating the application server installation.



## Configuring database connection strings

Before installing the Content Manager software, you need to configure the connection between the application server and the Content Manager database. The connection is defined with a database connection string.

The topics in this section explain in detail the tasks involved in configuring connection strings.

**Important:** If you are upgrading to Tridion Docs 15 from a version earlier than release 15, you must create a *new* connection string. You cannot reuse an existing string in this upgrade scenario because Tridion Docs 15 introduces a stricter policy for keywords in connection strings.

The following steps summarize the process in the order the tasks must be performed:

1. Create the connection string according to the requirements for the type of database you are using, that is, for Microsoft SQL Server or Oracle.
2. If using an Oracle database, update the `tnsnames.ora` file.
3. Add the connection string to the `inputparameter.xml` file.

The final step is part of the broader task of editing the `inputparameter.xml` file. The next topic in this section provides the details on this file. Once that is done, you are ready to run the Content Manager InstallTool. After completing the installation process, the system adds the connection string to the `connect` setting in the server's registry.

## Sample database connection strings

This topic provides examples of connection strings for SQL Server and Oracle databases.

### Connection strings for SQL Server

The following is an example of a standard connection string for Microsoft SQL Server:

```
Provider=MSOLEDBSQL.1;Data Source=myServerAddress;Initial Catalog=myDataBase;User Id=myUsername;Password=myPassword;
```

The following is an example of a standard connection string for Microsoft SQL Server that includes a trusted connection using Integrated Security:

```
Provider=MSOLEDBSQL.1;Data Source=myServerAddress;Initial Catalog=myDataBase;Integrated Security=SSPI;
```

When using Integrated Security, the user specified in the Input Parameter `osUser` used by InstallTool, should have sufficient privileges on the database.

#### Note:

- The provider shown is the Microsoft OLE DB Driver for SQL Server. Only this provider is supported.

- Communication between the application server and the database server is (by default) encrypted.  
One of the following is required:
    - A valid certificate issued by a certificate authority (CA) is installed on the Microsoft SQL Server.
    - The connection string contains "Trust server certificate = True" to indicate that you trust the server with a self-signed certificate.
  - Ensure that the connection string does not contain any of the following as keywords: *Access Token*, *Initial File Name* and *Server SPN*.
- 

### Connection strings for Oracle

The following is an example of a standard connection string for Oracle:

```
Provider=OraOLEDB.Oracle.1;Data Source=MyOracleDB;User Id=myUsername;  
Password=myPassword;
```

The following is an example of a standard connection string for Oracle with OS Authentication:

```
Provider=OraOLEDB.Oracle.1;Persist Security Info=False;User ID=/;Data Source  
=MyOracleDB
```

---

#### Note:

- The provider shown is the Oracle Provider for OLE DB. Only this provider is supported.
  - The data source is the *net\_service\_name* entry in the *oracle\_home\ network\ admin\ tnsnames.ora* file.
- 

### Editing *tnsnames.ora* for an Oracle database

For Oracle databases, the *tnsnames.ora* file defines the information for a connection to the database server and to the database instance for the Content Manager repository. Modify the file on the Oracle database server and on all systems that communicate with the Oracle database server.

#### About this task

If the Oracle database server and client software was installed on the same system, you must edit the *tnsnames.ora* file under each instance of *oracle\_home*.

## Procedure

1. Log in to the server as an administrator user.
2. Open the `oracle_home\network\admin\tnsnames.ora` file for editing.  
If the file does not exist create an empty text document named `tnsnames.ora` in the directory above.
3. Add the following to the file. Make sure that it is left-aligned (that is, no leading whitespace on the first line)

```
net_service_name =
(DESCRIPTION =
  (ADDRESS_LIST =
    (ADDRESS = (PROTOCOL = TCP)
      (HOST = hostname)
      (PORT = 1521))
  )
(CONNECT_DATA =
  (SERVICE_NAME = service_name)
)
```

where:

- `net_service_name` is an alias that is used for a connect descriptor. For example:

```
ISH.WORLD
```

- `hostname` is the IP address or name of the database server. For example:

```
(HOST = devserver01)
```

or

```
(HOST = 127.0.0.1)
```

- `SERVICE_NAME` is a combination of the `db_name` and `db_domain` values in the `C:\oracle\admin\ISH\pfile\PFIL\initISH.ora` file. For example:

```
SERVICE_NAME = ISH.ORASERVER.DOMAIN.NAME
```

where `ISH` is the `db_name` value and `ORASERVER.DOMAIN.NAME` is the `db_domain` value in the `initISH.ora` file.

4. Save and close the file.

## Preparing the `inputparameters.xml` file

The `inputparameters.xml` file stores parameters that are used by the Content Manager installer; therefore, the file must accurately reflect your environment before proceeding with installation. Only the mandatory parameters need to be considered in the vast majority of installations. The optional parameters cover rare and advanced cases.

### Before you begin

Before modifying the `inputparameters.xml` file, you need to do the following:

- Obtain and install the certificate.
- Configure HTTPS bindings.

### Procedure

1. From the `__InstallTool` folder of the installation directory, open the `inputparameters.xml` file for editing.
2. Edit the values of all mandatory parameters. Refer to the related topic for details. Each parameter in the `inputparameters.xml` file has the following syntax:

```
<param name="parameter">
  <currentvalue>value</currentvalue>
  <defaultvalue>example_value</defaultvalue>
  <description>description_of_how_used</description>
  <validate>if_validated</validate>
</param>
```

The XML elements perform the following functions:

#### **<currentvalue>**

Contains the value that is used by the Content Manager installer.

#### **<defaultvalue>**

Contains a predefined value as an example. Do not use the predefined value as a default value; its only purpose is to serve as an example.

#### **<description>**

Contains details describing how the current value of the parameter is used.

#### **<validate>**

Defines whether the value of the parameter is validated or not. If the element is empty, no validation is performed. The `<validate>` values are provided, and they should not be modified.

3. Edit the values of all optional parameters, as needed. Refer to the related topic for details.
4. Save and close the file.

## Mandatory input parameters in `inputparameters.xml`

This section lists and describes the main input parameters contained in the `inputparameters.xml` file, the ones you need to set for any installation. Some of these input parameters are mandatory: you need to set them in order for the installation to work correctly.

### **osuser**

The username of the designated operating system user. This user must be a local administrator and have the correct regional settings.

**ospassword**

The password for the designated operating system user. Set the password so that it never expires.

**connectstring**

The connection string for the Content Manager database (InfoShareCM). See the default suggestion or the documentation under "Sample database connection strings." For Oracle, use `'Provider=OraOLEDB.Oracle.1;Data Source=MyOracleDB;UserId=myUsername;Password=myPassword;'`

**ishamconnectstring**

The connection string for the Access Management database (InfoShareAM).

**ishbffconnectstring**

The connection string for the backend-for-frontend database (InfoShareBFF).

**ishidconnectstring**

The connection string for the Tridion Docs Identity Provider database (InfoShareID).

**apppath**

The root directory for the Content Manager installation.

By default, this is set to `c:\InfoShare`.

**baseurl**

The first part of the URL that your InfoShare users will need to browse to use it, say, `https://ish.example.com`

**ps\_java\_home**

The full path to an OpenJDK `JAVA_HOME` folder. This allows you to specify your path and, if needed, switch between compatible versions. Refer to the documentation for the version that was tested against.

---

**Note:** Do not use environment variables or put your file path in quotation marks.

---

**serviceusername**

Specify an existing InfoShare internal user profile `Username` to use for services like `TranslationBuilder`. Authentication happens over `AuthenticationContext` or using the deprecated WS-Trust authentication.

**servicepassword**

Specify an existing InfoShare internal user profile `Password` to use for services like `TranslationBuilder`. Authentication happens over `AuthenticationContext` or deprecated WS-Trust authentication.

**serviceaccountclientid**

Specify the InfoShare user profile `Username` to use for services like `TranslationOrganizer`. When the install tool for Access Management (`ISHAM`) is run, the value specified here is used, and thus becomes the service account client ID for requesting an access token from Access Management.

**serviceaccountclientsecret**

Specify any secret of your choice (it could be a GUID, for example) to use for services like `TranslationOrganizer`. When the install tool for Access Management (`ISHAM`) is run, the value specified here is used, and thus becomes the service account secret for requesting an access token from Access Management.

## Optional input parameters in `inputparameters.xml`

By default, the file `inputparameters.xml` contains only a set of mandatory properties. Optional parameters are either calculated by Content Manager, or they have a predefined default value. This section lists and describes the optional input parameters that you can set in the `inputparameters.xml` file. Only Content Manager experts should change these parameters.

### Optional parameters

**Note:** When you provide a value to a parameter that is calculated by default, the parameter is set to your value and is no longer calculated.

Name	Description	Default value
<code>projectsuffix</code>	Whenever more than one project is installed, the <code>projectsuffix</code> value indicates the project. Remember to make web application names and service ports unique as well. The value of this parameter is given as <code>PROJECTSUFFIX</code> in the rest of this table.	(none)
<code>webpath</code>	The path of the folder in which the website folder is created.	<code>APPPATH</code> (calculated)
<code>datapath</code>	The path of the folder in which the data folder is created. For example, when the <code>datapath</code> is <code>c:\InfoShare</code> the logs will be created in the folder <code>c:\InfoShare\Data\Logs\</code> .	<code>APPPATH</code> (calculated)
<code>workspacepath</code>	This path is a temporary folder in which all the folders and files are copied and modified before the actual installation.	<code>APPPATH\Workspace</code> (calculated)
<code>infosharecswebappname</code>	The name of the web application that offers Organize Space, Draft Space and Review Space Services.	<code>ISHCS + PROJECTSUFFIX</code>
<code>infoshareauthorwebappname</code>	The name of the Content Manager web application hosting <code>ClientConfig</code> and ASP.NET pages.	<code>ISHCM + PROJECTSUFFIX</code>
<code>infosharewswebappname</code>	The name of the web application for Content Manager web services.	<code>ISHWS + PROJECTSUFFIX</code>
<code>infosharestswebappname</code>	The name of the web application with the deprecated Content Manager Secure Token Service (STS).	<code>ISHSTS + PROJECTSUFFIX</code>
<code>websitename</code>	The name of the website in which all web applications will be created.	Default Web Site

Name	Description	Default value
infoshareidwebappname	The name of the web application with the Content Manager Identity Provider Service (ISHID).	ISHID + <i>PROJECTSUFFIX</i>
infoshareextwebappname	The name of the web application with the Web Extensions Service hosting customizations for Organize Space.	ISHEXT + <i>PROJECTSUFFIX</i>
infoshareamwebappname	The name of the Access Management web application (ISHAM).	ISHAM + <i>PROJECTSUFFIX</i>
localservicehostname	Indicates the local service hostname part of the base URL. This can be <code>localhost</code> or the machine name. It will be used by all service side components that access the WCF Services on the same box.	the <b>NetBIOS</b> name of this local computer (calculated)
ps_fo_processor	The fully qualified file name of the XSL-FO processor, for example <code>C:\Program Files\AntennaHouse\AHFormatterV6\AHFCmd.exe</code> .	the highest installed version in <code>%ProgramFiles%</code> (calculated).
ps_htmlhelp_processor	The fully qualified file name of the HTML Help processor.	<p><code>C:\Program Files (x86)\HTML Help Workshop\hhc.exe</code></p> <p><b>Note:</b> Do not use environment variables or quotation marks.</p>
ps_javaehelp_home	The full path to a <b>JavaHelp</b> <code>JHHOME</code> folder, used when you want to publish with the <b>JavaHelp</b> output type.	<p><code>C:\javaehelp\jh2.0</code></p> <p><b>Note:</b> Do not use environment variables or quotation marks.</p>
solrlucene_service_port	The port that the <code>SolrLucene</code> service uses. This port must be unique for each Content Manager instance installed on a server.	8983
basehostname	The hostname part of the base URL. This value will be calculated using <i>BASEURL</i> as input, stripping the protocol <code>http</code> or <code>https</code> (e.g. <code>ish.example.com</code> )	<i>BASEURL</i> (calculated)

Name	Description	Default value
<code>servicecertificatethumbprint</code>	The thumbprint of an already installed certificate (e.g. A43489159A520F0D93D032CCAF37E7FE20A8B419) for unique service identification. You can repurpose your SSL certificate. Note that all your linked web application servers in a farm should offer the same trusted certificate.	from HTTPS binding of <code>websitename</code>
<code>servicecertificatevalidationmode</code>	The validation mode specified here decides how the application-to-application communication validates service certificates (specified in <code>servicecertificatethumbprint</code> ). The allowed options are: <code>ChainTrust</code> , <code>PeerTrust</code> , <code>PeerOrChainTrust</code> or <code>None</code> . Setting the mode to <code>None</code> causes any certificate to be accepted.	<code>ChainTrust</code>
<code>servicecertificatesubjectname</code>	Specify the subject name of an already installed certificate for unique service identification. You can repurpose your SSL certificate. Note that all your linked web application servers in a farm should offer the same trusted certificate.	from HTTPS binding of <code>websitename</code>

## Executing the InstallTool

Use the Content Manager InstallTool to install and merge all standard and customer specific project files.

### Before you begin

In the context of a Content Manager install or uninstall operation, before you run InstallTool you need to make sure the Microsoft Distributed Transaction Coordinator MSDTC service is running.

### Procedure

1. Login to your Windows system as a Content Manager user with the Administrator user role.
2. In Windows Explorer, go to  
`C:\IshCD\yyyymmdd.CD.InfoShare<version_num>\ProjectName.IT\__InstallTool`
3. Locate and double-click on **InstallTool.exe**.
4. Select the **Install** option by entering the number **2**.
5. Hit enter to respond to all questions; the default options should be sufficient.

All standard and customer specific project files are merged and installed. All required services have to be started manually (the Crawler, SolrLucene, IISAdmin, W3SVC).



## Identifying reverse proxies

Various reverse proxy servers can be used in combination with Content Manager. Using reverse proxy servers may result in connection problems to the Content Manager repository. You can check the BASEURL to verify that it is not causing any problem in your internet browser.

When you identify reverse proxy servers, verify that the following URLs do not cause any problems in the internet browser:

- `BASEURL/ISHWS/Application.asmx?wsdl`
- `BASEURL/ISHWS/Application.asmx?disco`

The BASEURL is specified in the `inputparameters.xml` file used by the Content Manager installer.

The BASEURL must use the `https` schema. It must also reference a hostname that is valid for the SSL certificate.

For example if the server has a SSL certificate configured with `CN=example.com` then the BASEURL must be `https://example.com`.

Example:

```
<param name="baseurl">
<currentvalue>https://example.com</currentvalue>
<defaultvalue>https://example.com</defaultvalue>
<validate/>
</param>
```

Make sure that the URLs are accessible by your users.

## Post upgrade tasks

After you complete the upgrade of your Content Manager server, you should perform a number of post-upgrade tasks. These tasks help you to verify the installation and configure the components that you have just upgraded.

## Verifying Microsoft SQL System Administration role permissions

To ensure that the database upgrade tool (DBUpgradeTool or DBUT) works properly, the `isource` user must have system administrator permissions.

### About this task

To allow DBUT to fully execute all necessary tasks to update your MS SQL database now and for each new release, follow the procedure below to ensure the database user has the necessary permissions.

---

**Note:** This procedure applies only if you are using SQLServer. This procedure does not apply to Oracle.

---

### Procedure

1. Access the **SQL Server Management Studio**.

Windows 2012: To access the **SQL Server Management Studio** if not readily accessible, use the **Windows Powershell** icon on the bottom toolbar then at the prompt type: **Ssms.exe**.

---

**Note:** If prompted and required, connect to the server.

---

2. Under the folder for the MSSQL server in the left pane, open **Security > Logins**.
3. Right-click on the **isource** user and select **Properties**.  
A Login Properties - isource window displays.
4. In the left pane of the Login Properties - isource window select **Server Roles**.
5. In the right pane for Server Roles select **public** and **sysadmin**.
6. Click **OK**.
7. Click **File > Exit** to exit and close the Microsoft Server Management window.

## Running DBUpgradeTool for maintenance

DBUpgradeTool (DBUT), for all supported database engines, performs an overall verification of the database and updates database objects such as views, indexes, packages and stored procedures and modifies metadata structures.

### Before you begin

- System Administrator rights for the **isource** database user.
- Available, complete and correctly installed Content Manager server and Content Manager database (up and running).  
The installation ensures that the upgrade files and connections are in place to allow a successful upgrade.
- Exclusive access to the Content Manager database for DBUT.  
Be sure to stop all components and services, such as InfoShare Crawler, on all servers.

## Procedure

1. Login to the server as a Windows user with the Administrator user role.
2. In Windows Explorer, in the Content Manager installation directory, open: \ App\ Setup\ DBUpgradeTool\
3. Locate and double-click on DBUpgradeTool.exe
4. Optional, for ADFS only:  
Use DBUT to configure the FishExternalID of the administrator user with a value such as *domain\ username*, for the user who has to log in the system as administrator.
  - Run DBUpgradeTool, select option 1: **Maintenance**.
  - Select option 5: **Append** an user's externalid for initial STS logon.
  - Choose the installation and then fill in the appropriate value for the Content Manager admin user.
5. Select the **DatabaseUpgrade** option.
6. Hit the **Enter** key to respond to all questions; the default options are sufficient for the following questions:
  - Select your recently installed project (thereby selecting the database location and user, upgrade script paths, version and so on).
  - Default for the application.

The result is an upgrade from an older or same version to the installed version when applicable. The application pool needs to be restarted after a DBUT run.

## Troubleshooting DBUpgradeTool

You may encounter issues during DBUT execution for database upgrade purposes.

### Execution is interrupted

If the DBUT suddenly dies, it results in a hanging database upgrade logged in to the database. All other attempts to upgrade will fail since only one upgrade process is permitted to run at a time.

To force an undo of a hanging update, execute DBUT then select **Maintenance > Terminate** and your current project.

### Current user isource warnings

The following warnings can occur in DBUT:

- WARNING: The current user "isource" does not have permission to disable the standard database job for InfoShare.
- WARNING: The current user "isource" does not have permission to install the standard database job for InfoShare. Ask a System Administrator to manually execute ISH\_CreateStandardInfoShareJob.sql and ISH\_EnableStandardInfoShareJob.Sql to create and enable the standard InfoShare job!
- WARNING: The current user "isource" does not have permission to enable the standard database job for InfoShare.

These warnings are returned when the user executing DBUT has not enough rights to access/create database jobs.

- Creating a database job requires a database administrator to execute `CD-Package\Database\InfoShareCM\Common\<SQLServerVersion>\Create\ISH_CreateStandardInfoShareJob.sql` and `CD-Package\Database\InfoShareAM\Common\<SQLServerVersion>\Create\ISH_CreateStandardInfoShareJob.sql`
- Enabling a database job requires a database administrator to execute `CD-Package\Database\InfoShareCM\Common\<SQLServerVersion>\Create\ISH_EnableStandardInfoShareJob.Sql` and `CD-Package\Database\InfoShareAM\Common\<SQLServerVersion>\Create\ISH_EnableStandardInfoShareJob.Sql`

### Requesting assistance

In case you need to request assistance, you need to provide the following information:

- A screenshot of the failed execution of DBUpgradeTool.
- The log file: `\App\Setup\DBUpgradeTool\DBUpgradeTool.log`

## Installing ISHDeploy and ISHRemote

When installing or upgrading to Tridion Docs 15, you need to install the ISHDeploy and ISHRemote PowerShell modules on the Content Manager application server. The modules are needed to run the scripts delivered with Tridion Docs.

### Before you begin

- Microsoft Windows PowerShell 5.1 (part of Windows Management Framework 5.1)  
To quickly check your installed PowerShell version, execute the following script:

```
$PSVersionTable
```

If your operating system has an earlier version of PowerShell, then you need to install PowerShell 5.1.

- You must be logged on as an administrator user to perform this task.

### About this task

All scripts delivered with Tridion Docs, such as those in the `..\DatabaseIndependent\Examples` folder, expect ISHDeploy and ISHRemote to be installed. Install both of the PowerShell modules using the installation script delivered with your installation package or downloaded from the [PowerShell Gallery](#) (always the latest).

### Procedure

1. On the Content Manager application server, open a PowerShell prompt.
2. Run one of the following PowerShell scripts:

#### InstallPowerShellLibrariesFromLocal.ps1

This script is provided in the local NuGet packages delivered with the product. Get it from the following folder: `c:\InfoShare\App\Setup\PowerShell\Repository`

To run the script, use the following command:

```
& '.\InstallPowerShellLibrariesFromLocal.ps1'
```

**InstallPowerShellLibrariesFromPSGallery.ps1**

This script always installs the *latest* versions of ISHDeploy and ISHRemote. You can download from [PowerShell Gallery](#).

To run the script, use the following command:

```
& '.\InstallPowerShellLibrariesFromPSGallery.ps1'
```

Both ISHDeploy and ISHRemote are now installed.

## Using ISHDeploy to configure a new or upgraded Content Manager

ISHDeploy cmdlets to configure Content Manager following installation or upgrade.

ISHDeploy is a PowerShell module that enables the **code as configuration** concept for Tridion Docs. You can use ISHDeploy provides cmdlets for all basic setup operations, and many advanced configuration tasks. Although manual configuration is still available, we recommend you use ISHDeploy for improved simplicity and safety. ISHDeploy also gives you access to automation.

For information on how to use ISHDeploy, see *“Configuring Content Manager with ISHDeploy”* on page 0.

## The Administrator setup

Needs to be done only if you did not receive a fully prepared database dump-backup file, otherwise this is done and configured.

---

**Note:**

- This is the responsibility of a functional administrator not of a technical administrator.
  - The configurations handled in this section are all managed through the Author website Settings tab.
  - The delivered configuration files are available in `web\Author\EnterViaUI` or, for your customer specific files, in `\CustomerSpecificFiles\Websites\Author\EnterViaUI`.
- 

## Completing the Administrator setup

Needs to be done only if you did not receive a fully prepared database dump-backup file, otherwise this is done and configured.

**Procedure**

1. Sign in to Organize Space as a user with administrator-level credentials.
2. On the top tab level, select the **Settings** tab.
3. On the second tab level, select the **XML Settings** tab.
4. To configure each of the following:
  - a. Select the third-level tab in the **To configure, go to** column in the table below.
  - b. Delete the contents of the text box.
  - c. Copy the contents of the file indicated in the **Copy from** column to the text box. When you copy, ensure that there are no leading empty lines.  
The files are located on the server in the Content Manager\_home directory in \ web\ Author\EnterViaUI\

To configure, go to:	Copy from:	On the top menu bar, click:
<b>Inboxes</b>	Admin.XMLInboxConfigurat	<b>Save</b> xml
<b>Write Plug-ins</b>	Admin.XMLWriteObjPluginC	<b>Save</b> .xml
<b>Publish Plug-ins</b>	Admin.XMLPublishPluginCon	<b>Save</b> eration.xml
<b>Reports</b>	Admin.XMLReportConfigura	<b>Save</b> xml
<b>Statuses</b>	Admin.XMLStatusConfigura	<b>Save</b> xml
<b>Translations</b>	Admin.XMLTranslationconf	<b>Save</b> tion.xml
<b>Change Tracker</b>	Admin.XMLChangeTrackerCon	<b>Save</b> xml
<b>Background Tasks</b>	Admin.XMLBackgroundTaskC	<b>Save</b> uration.xml
<b>Extensions</b>	Admin.XMLExtensionConfig	<b>Save</b> on.xml
<b>Collective Spaces</b>	Admin.XMLCollectiveSpace	<b>Save</b> figuration.xml

**Validation XML configuration files**

As part of the introduction of the Settings API 2.5, a schema was made for all configuration XML files.

- Configuration files received a version number

```
<InfoShareStates version="1.0">
...
</InfoShareStates>
```

- Configuration files are validated against this schema when they are submitted through the user interface (UI). The rest of the application assumes that the configuration files in the database are valid.

Resubmit the legacy configuration XML files using Organize Space, **Settings > XML Settings**. The configuration file is validated and some corrections are made. For example, a @version attribute with the value, 1.0 is added. If there are validation errors when resubmitting the configuration files, remove all statuses in the status definitions with value "Not found as LOV Value".

```
<Status Elm="..." value="Not found as LOV Value"/>
```

## Upgrading Content Manager from 13.0.0 or 13.0.1

New features and feature changes that appeared between the 13.0.0 release and the service packs require specific actions for the upgrade.

### Upgrading the templates

Upgrading the templates will provide one or several of the following results, depending on which Content Manager version you are upgrading from: replacement of Oasis DTDs by RWS DTDs, creation of new templates, addition of template languages, addition of template descriptions (in English).

#### About this task

This new DOCTYPE incorporates `ishcondition` attributes as well as adaptations for DITA 1.3.

This task applies to restored databases from Content Manager 12.0.x., or Content Manager 13.0.x earlier than 13.0.2.

#### Procedure

1. Find and open the `App\Database\InfoshareCM\Common\DatabaseIndependent\Examples\UpdateEditorTemplates` directory in Content Manager home directory.
2. Locate and run the `Update-XmlEditorTemplates.ps1` script.

#### Results

Material is uploaded from the `\Web\Author\EnterViaUI\System\Editor template` directory, and is used to create the following items:

- A new version for the existing templates (including the API reference specific topic type), with RWS DTDs replacing the Oasis DTDs. This also affects objects used as templates.
- New templates according to the types introduced by DITA 1.3 (such as the troubleshooting type).
- Languages for the templates: English (en), German (de), Dutch (nl), Japanese (ja) and Chinese (zh).

- A description for each default template, to be used when an English language object is created.

## Upgrading templates for publications in combined languages

A publication with combined languages needs extra maps, extra indexes and specific headers. This requires that you enable specific templates.

### About this task

This task applies to restored databases from Content Manager 12.0.x.

### Procedure

1. Find and open the `App\Database\InfoShareCM\Common\DatabaseIndependent\Examples\CreateModuleCombineLanguages` directory in Content Manager home directory.
2. Locate and run the `CreateModuleCombineLanguages.ps1` script.

The script will create a header topic `ISHPUBLMODULECOMBINELANGUAGES` in all languages that are available in the Content Manager database using the files located in `\Web\Author\EnterViaUI\System\Publishing\Topics`.

For the Content Manager default two-letter language codes, the header topic is created using the matching file from `\Web\Author\EnterViaUI\System\Publishing\Topics`. For others language codes, the code is used as title. For example, from a `ISHPUBLMODULECOMBINELANGUAGES=1=en-us.xml`:

```
<!DOCTYPE topic PUBLIC "-//OASIS//DTD DITA Topic//EN" "topic.dtd" []>
<topic id="ISHPUBLMODULECOMBINELANGUAGES" xml:lang="en-us">
  <title>en-us</title>
  <body>
    <section></section>
  </body>
</topic>
```

During publishing the file `ISHPUBLMODULECOMBINELANGUAGES=1=en.xml` will create a section in the multi-language publication that will be labeled **English** (because `en` is a default code). On the other hand, `ISHPUBLMODULECOMBINELANGUAGES=1=en-us.xml` will create a section in the multi-language publication that will be labeled **en-us**.

3. If you want to create a user-readable label for any non default language or language code, you can either:
  - Create the corresponding XML file and specify the label inside the `<title>` element before running the script.
  - Or edit the header topic created by the script after it has been run.



## Cleaning up the EDTs

The Electronic Document Types (EDT) list needs to be cleaned up with the help of SDL Support.

Some EDT has been made obsolete in the new version, and mime types have been upgraded. Contact SDL Support to get help in removing the obsolete EDTs from your system's list as well as correcting the mime types.

## Configuring an upgraded Content Manager for publishing to Dynamic Delivery

Publishing to Dynamic Delivery requires additional steps if you are upgrading from version 12.0.x to 13.0.x or from 13.0.0 to 13.0.1.

### Upgrade to 13.0.x from 12.0.x

When you are planning to use Dynamic Delivery as delivery platform with Content Manager 13.0.x, the recommended procedure is:

1. Upgrade to Content Manager 13.0.x.
2. Install Content Delivery.
3. Configure Content Manager for Content Delivery, as described in Tridion Docs documentation (specify Discovery URL, Client ID and Client Secret).

The upgrade installs new settings that will enable the Write plugin to initiate the appropriate publish process, depending on the output format you are publishing to.

When Content Manager and Content Delivery are installed and configured, before publishing your content you need to:

- Create the Dynamic Delivery output format, preferably by running the `Create-DITADLVR.ps1` script that we provide.
- Provide values for the **Product family name** and **Product release name** lists, in Content Manager **Settings**.
- For each publication you want to publish, set the appropriate **Product family name** and **Product release name**, and create its Dynamic Delivery output format.

### Upgrade to 13.0.1 from 13.0.0

The output format name has changed between those two versions, therefore a label must be updated. It can be done either manually or by using a script.

- By script: run `Create-DITADLVR.ps1`. It will overwrite the output format old name with the new one.
- Manually: in **Settings > Output Formats**, open the **Properties** of the DITA Delivery output format and replace the DITA Delivery label with Dynamic Delivery.

## Configuring Content Manager for the new translation review flow

The new translation flow requires a list of object statuses that is slightly different than the one used by the previous version's flow. During an installation, the new status list is configured out-of-the-box. During an upgrade, however, the existing list of statuses is left unchanged and you need to add the new ones manually.

The new translation review flow includes an approval/rejection step. Statuses with specific names, and transitions, need to exist for this flow to run without error with WorldServer or TMS. After a Content Manager upgrade, you need to create them prior to run the out-of-the-box new flow with WorldServer and TMS.

New statuses:

- **Translation in review**
- **Translation rejected**

Status renamed:

- **Translated** has become **Translation approved**

The list of status - role - transition - inbox combinations that need to be added to the ones that already exist in Content Manager 12.0.0. You can find comprehensive descriptions in the Workflow chapter inside the usage section of Tridion Docs documentation.

User role	Initial status: Object type	Initial status: Object status	Transition(s)	Inbox(es)
Author	All types	Draft	Draft to To be reviewed	<b>Author</b> receiving each map/topic/image/library with Draft, In translation or Released status.
Reviewer	All types	NONE	Translation approved to [To be translated; Released]  Translation in review to [Translation approved; Translation rejected]	<b>Reviewer</b> receiving each map/topic/image/library with To be reviewed status.  <b>Translated</b> receiving each object with Translation approved status.

User role	Initial status: Object type	Initial status: Object status	Transition(s)	Inbox(es)
Translator	All types	NONE	In translation to [Translation approved; To be translated] Translation approved to To be translated	<b>In Translation</b> receiving each object with In translation status.  <b>Translator</b> receiving each map/topic/image/libraries with To be translated status.
TRANSLATORSERVICE	All types	To be translated	In translation to [To be translated; Translation approved; Translation in review] Translation in review to [To be translated; Translation approved; Translation rejected]  Translation rejected to [To be translated; In translation]	NONE

You can also customize Content Manager workflow and use entirely different statuses and transitions than the ones provided out-of-the-box. Before you add or change statuses and transitions, make sure you add a `<translationstatuses>` element to the **XML Translation Settings**, according to the instructions provided in Tridion Docs documentation.

## Checking translation services roles and privileges

An active TRANSLATORSERVICE role is necessary for translation services (TranslationOrganizer, TranslationBuilder) to operate. This role is part of the out-of-the-box settings for Content Manager 10.0.0 and later. As from Tridion Docs 15, the user used for translation services must have an "Administrator" user role, or be a part of any other role that as "System Administrator" privilege or "Translation Mangement" privilege. In case TRANSLATIONSERVICE role needs to be created with all status transitions, follow the procedure:

**Procedure**

1. Sign in to Organize Space as a user with administrator-level credentials.
2. On the top tab level, select the **Settings** tab.
3. On the second tab level, select the **Users** tab.
4. On the third tab level, select the **User Roles** tab.
5. Do one of the following:
  - If *TRANSLATORSERVICE* is part of the list, select it and select **Properties** from the button toolbar. In the dialog that opens, make sure that **Active** is selected.
  - If *TRANSLATORSERVICE* is not part of the list, create it by selecting **New** from the button toolbar and, in the dialog that opens, specifying *TRANSLATORSERVICE* in the **Name** field. Then select **OK** to close the dialog and apply your changes.
6. On the second tab level, select the **XML Settings** tab.
7. On the third tab level, select the **Statuses** tab.
8. Check that the following status transitions are configured as `<FromStatus>` sections in the `<Transitions>` section of the XML you see:

From Status	To Status	User Role
To be translated	In translation	TRANSLATORSERVICE
In translation	Translation in review	TRANSLATORSERVICE
In translation	Translation approved	TRANSLATORSERVICE
Translation in review	Translation approved	TRANSLATORSERVICE
Translation in review	Translation rejected	TRANSLATORSERVICE
Translation rejected	In translation	TRANSLATORSERVICE

If you see XML for all these transitions, then no other action is required.

9. However, if any of these transitions are not part of the list, create them by adding the following XML fragment within the `<Transitions>` section:

```
<FromStatus ref="FROMSTATUS" userrole="TRANSLATORSERVICE">
  <ToStatus ref="TOSTATUS" />
</FromStatus>
```

where *FROMSTATUS* is the item in the **From Status** column above for the missing transition, and *TOSTATUS* is the item in the **To Status** column above for the missing transition.

10. If you made any changes, select **Save** to commit those changes.

## Upgrading your Inboxes configuration

Tridion Docs 15 introduces some changes to the XML of the configuration for Inboxes. To transform your existing inbox configuration XML from old format to new format, run a Powershell script.

### About this task

The script assumes to find your old inbox configuration XML file in the folder `C:\InfoShare\Web\Author\EnterViaUI\`. If you would like the conversion to occur in another folder, you can edit the script to change the path.

### Procedure

1. On your installation media, go to the folder `__Resources\InfoShareScripts\Upgrade140xTo1500\`.
2. Copy the script `ConvertInboxConfiguration.ps1` to your Content Manager server machine.
3. Run the Powershell script.  
The script reads `Admin.XMLInboxConfiguration.xml` and creates a converted file `Admin.XMLInboxConfiguration.converted.xml` in the same folder.
4. Replace your existing XML inbox configuration in the Content Manager database with the contents of the converted file. You can do this in one of the following ways:
  - In the new Organize Space user interface, go to **Settings > XML Settings > Inboxes**. Clear the XML content you see, and paste the contents of `Admin.XMLInboxConfiguration.converted.xml` into it. Then select **Save** to apply the change.
  - Write a script that replaces the XML in the database with the contents of `Admin.XMLInboxConfiguration.converted.xml`, and run it.

## Upgrading your Background Task configuration

Tridion Docs 15 introduces some changes to the XML of the configuration for Background Tasks. To transform your existing Background Task configuration XML from old format to new format, run a Powershell script.

### About this task

The script assumes to find your old Background Task configuration XML file in the folder `C:\InfoShare\Web\Author\EnterViaUI\`. If you would like the conversion to occur in another folder, you can edit the script to change the path.

### Procedure

1. On your installation media, go to the folder `__Resources\ InfoShareScripts\ Upgrade140xTo1500\`.
2. Copy the script `ConvertBackgroundTaskConfiguration.ps1` to your Content Manager server machine.
3. Run the Powershell script.  
The script reads `Admin.XMLBackgroundTaskConfiguration.xml` and creates a converted file `Admin.XMLBackgroundTaskConfiguration.converted.xml` in the same folder.
4. Replace your existing XML Background Tas configuration in the Content Manager database with the contents of the converted file. You can do this in one of the following ways:
  - In the new Organize Space user interface, go to **Settings > XML Settings > Background Tasks**. Clear the XML content you see, and paste the contents of `Admin.XMLBackgroundTaskConfiguration.converted.xml` into it. Then select **Save** to apply the change.
  - Write a script that replaces the XML in the database with the contents of `Admin.XMLBackgroundTaskConfiguration.converted.xml`, and run it.

## Updating your taxonomy connector configuration

### Before you begin

As of SDL Tridion Docs 14 SP1, the taxonomy connector configuration accepts identifiers for its Category and its root Keyword that persists across Content Manager instances in a DTAP (Development, Test, Acceptance, Production) setup. Modify your taxonomy connector configuration to make it portable across such a setup.

### About this task

Before SDL Tridion Docs 14 SP1, you could only specify the two named parameters `CategoryId` and `RootKeywordId` by their SDL Tridion Sites Content Manager URIs. These identifiers are different across Content Manager instances. To improve portability, SDL Tridion Docs 14 SP1 now allows you to use portable identifiers instead, and recommends that you change the existing URIs in your configuration to such portable identifiers instead.

### Procedure

1. Sign in to Organize Space.
2. On the top tab level, select the **Settings** tab.
3. On the second tab level, select the **XML Settings** tab.
4. On the third tab level, select the **Extensions** tab.
5. Find the `source` section that has a `parameter` subelement with its `name` attribute set to the value `CategoryId`.
6. Change the value of this subelement from a Content Manager URI to the equivalent WebDAV URL. Refer to the Tridion Sites documentation to learn more about WebDAV URLs.
7. In the same `source` section, check for a `parameter` subelement that has a `name` attribute

set to the value `RootKeywordId`.

8. Change the value of this subelement from a Content Manager URI to the equivalent Keyword key. To find this key, in the Tridion Sites Content Manager Explorer user interface, enter the URI, open the properties of the Keyword, and copy the value of the **Key** field into the parameter value in Tridion Docs.
9. Repeat steps 5-8 for the other `source` sections.
10. Select **Save** to apply your changes.

## Enabling Content Manager user interfaces and features

After installing Content Manager, you can individually enable the individual user interfaces and subfeatures that are part of Collective Spaces.

### Enabling Draft Space

Enable Draft Space by running an ISHDeploy command and setting the **Enable Draft Space** flag in the Organize Space user interface.

#### Before you begin

To learn how to access and use ISHDeploy, refer to the section on "" on page 0.

#### About this task

Draft Space is one of two tools that are grouped under the name Collective Spaces.

#### Procedure

1. In a Powershell command shell, enter the following command:

```
Enable-ISHUICollectiveSpaces -DraftSpace -ISHDeployment ISHDEPLOYMENT
```

where *ISHDEPLOYMENT* is the deployment you want to use. (If you have only one deployment, you can omit the `-ISHDeployment` parameter and its value.)

2. Enable Draft Space from the Organize Space user interface by doing the following:
  - a. On the top tab level, select the **Settings** tab.
  - b. On the second tab level, select the **System** tab.
  - c. On the third tab level, select the **Default Settings** tab.
  - d. Select **Enable Draft Space**.
  - e. Select **Save** to apply your changes.

### Results

You now have access to Draft Space for web browser-based content authoring.

## Enabling Review Space

Enable Review Space by running an ISHDeploy command and setting the **Enable Review Space** flag in the Organize Space user interface.

### Before you begin

To learn how to access and use ISHDeploy, refer to the section on "" on page 0.

### About this task

Review Space is one of two tools that are grouped under the name Collective Spaces.

### Procedure

1. In a Powershell command shell, enter the following command:

```
Enable-ISHUICollectiveSpaces -ReviewSpace -ISHDeployment ISHDEPLOYMENT
```

where *ISHDEPLOYMENT* is the deployment you want to use. (If you have only one deployment, you can omit the `-ISHDeployment` parameter and its value.)

2. Enable Review Space from the Organize Space user interface by doing the following:
  - a. On the top tab level, select the **Settings** tab.
  - b. On the second tab level, select the **System** tab.
  - c. On the third tab level, select the **Default Settings** tab.
  - d. Select **Enable Review Space**.
  - e. Select **Save** to apply your changes.

### Results

You now have access to Review Space for web browser-based content reviewing.

## Enabling Document History for Draft Space

Enable Document History for Draft Space by running an ISHDeploy command and setting the **Enable Draft Space Document History** flag in the Organize Space user interface.

### Before you begin

In order to be able to use Document History for Draft Space, Draft Space must be enabled.

To learn how to access and use ISHDeploy, refer to the section on "" on page 0.



### About this task

Document History is one of the tools that are grouped under the name Collective Spaces. It lets you trace the history of each document in detail, but you should only enable it if you have the required license for this feature.

### Procedure

1. In a Powershell command shell, enter the following command:

```
Enable-ISHUICollectiveSpaces -DocumentHistoryForDraftSpace  
-ISHDeployment ISHDEPLOYMENT
```

where *ISHDEPLOYMENT* is the deployment you want to use. (If you have only one deployment, you can omit the `-ISHDeployment` parameter and its value.)

2. Enable Document History for Draft Space from the Organize Space user interface by doing the following:
  - a. On the top tab level, select the **Settings** tab.
  - b. On the second tab level, select the **System** tab.
  - c. On the third tab level, select the **Default Settings** tab.
  - d. Select **Enable Draft Space Document History**.
  - e. Select **Save** to apply your changes.

### Results

You now have access to Document History for web browser-based content authoring. The **Show Changes** option is now enabled for documents in Draft Space.

## Enabling Document History for Review Space

Enable Document History for Review Space by running an ISHDeploy command and setting the **Enable Review Space Document History** flag in the Organize Space user interface.

### Before you begin

In order to be able to use Document History for Review Space, Review Space must be enabled.

To learn how to access and use ISHDeploy, refer to the section on "" on page 0.

### About this task

Document History is one of the tools that are grouped under the name Collective Spaces. It lets you trace the history of each document in detail, but you should only enable it if you have the required license for this feature.

### Procedure

1. In a Powershell command shell, enter the following command:

```
Enable-ISHUICollectiveSpaces -DocumentHistoryForReviewSpace  
-ISHDeployment ISHDEPLOYMENT
```

where *ISHDEPLOYMENT* is the deployment you want to use. (If you have only one deployment, you can omit the `-ISHDeployment` parameter and its value.)

2. Enable Document History for Draft Space from the Organize Space user interface by doing the following:
  - a. On the top tab level, select the **Settings** tab.
  - b. On the second tab level, select the **System** tab.
  - c. On the third tab level, select the **Default Settings** tab.
  - d. Select **Enable Review Space Document History**.
  - e. Select **Save** to apply your changes.

### Results

You now have access to Document History for web browser-based content authoring. The **Show Changes** option is now enabled for documents in Review Space.

## Setting the Collective Spaces URL for your accounts

### Before you begin

As of SDL Tridion Docs 14 SP2, Publication Manager users can copy the Draft Space URL or Review Space URL of each topic to the clipboard. To enable this feature for an account, the Collective Spaces URL must be configured in the account settings.

### Procedure

1. Start Publication Manager.
2. Select **Tools > Accounts**.
3. In the **Repository** tab, find the **Collective Spaces address** property.
4. Fill in the Collective Spaces URL and select **OK**.

## Enabling services

After the install is complete, services will not start automatically, since the database is not guaranteed to be in the right state until you run DBUT tool. Also, you might decide not to start some services on the specific installation depending on the server role. To enable typical services you can locate and run the `Enable-DefaultServices.ps1` script.

## Before you begin

To run the `Enable-DefaultServices.ps1` script the `ISHDeploy` module is required.

- `DBUT` completed successfully.
- The Administrator setup completed successfully.
- The `TRANSLATORSERVICE` role is created and the translation status transitions have been assigned to it.
- System Administrator rights.

## Procedure

1. Run the script `\\App\\Setup\\Manage\\Enable-DefaultServices.ps1`  
Typical services (Trisoft InfoShare Crawler One, Trisoft InfoShare SolrLucene, Trisoft InfoShare BackgroundTask One, Trisoft InfoShare TranslationBuilder One etc.) are started, startup type is set to "Automatic (Delayed Start)".

# Rebuilding the full text index

You can rebuild the full text index if it is no longer synchronized with the current database, or after a Content Manager upgrade on a new server for example. It should be done using `Invoke-ISHFullTextIndexMaintenance` cmdlet available over `ISHDeploy` module.

## Before you begin

- You need to run `ISHDeploy` cmdlets as an administrator for the application server
- The crawler service must be running.
- To learn how to access and use `ISHDeploy`, refer to the section on "" on page 0.

**Note:** We recommend that you rebuild the index outside regular business hours as the initialization uses database resources. In addition, the index may take a while to rebuild depending on the size of the repository.

## Procedure

1. In a Powershell command shell, enter the following command:

```
Invoke-ISHFullTextIndexMaintenance -ISHDeployment $deployment  
ISHDEPLOYMENT -Cleanup
```

to remove the existing index, where `ISHDEPLOYMENT` is the deployment you want to use. (If you have only one deployment, you can omit the `-ISHDeployment` parameter and its value.)

2. In a Powershell command shell, enter the following command:

```
Invoke-ISHFullTextIndexMaintenance -ISHDeployment $deployment  
ISHDEPLOYMENT -ReIndex
```

to rebuild the full text index, where *ISHDEPLOYMENT* is the deployment you want to use. (If you have only one deployment, you can omit the `-ISHDeployment` parameter and its value.)

## Configure Security Token Service for authenticating WCF .SVC web services (deprecated)

The WCF .SVC web services require that you configure a Security Token Service (STS) for authentication, which uses ISHSTS as the default identity provider.

Using ISHDeploy is an alternative to the manual tasks described in this section.

Security Token Service for externalized authentication and Single Sign-On is deprecated as of Tridion Docs 15. Prior to Tridion Docs 15, the Content Manager user interfaces also used Security Token Service; however, these applications now use Tridion Access Management. At this time, only the WCF .SVC web services continue to use the deprecated Security Token Service.

### Web Services requirements for Security Token Service

The WCF .SVC web services (ISHCM) require identifiers and certificates to configure Security Token Service.

#### Profile

WCF .SVC web services rely on an *Active profile* to do *Federated Authentication*. The profile refers to SOAP-based web services implementing the WS Trust protocol. Token encryption is mandatory.

#### Identifiers and encryption certificates

The web service ISHCM expects specific identifiers in combination with an encryption certificate to be configured on a Security Token Service.

The encryption certificate is the public key of the certificate referenced through the `servicecertificatethumbprint` input parameter.

The identifiers are as follows:

- `https://example.com/ISHWS/`
- `https://example.com/ISHWS/Wcf/API25/Application.svc`
- `https://example.com/ISHWS/Wcf/API25/Baseline.svc`
- `https://example.com/ISHWS/Wcf/API25/DocumentObj.svc`
- `https://example.com/ISHWS/Wcf/API25/EDT.svc`
- `https://example.com/ISHWS/Wcf/API25/EventMonitor.svc`
- `https://example.com/ISHWS/Wcf/API25/Folder.svc`

- <https://example.com/ISHWS/Wcf/API25/ListOfValues.svc>
- <https://example.com/ISHWS/Wcf/API25/MetadataBinding.svc>
- <https://example.com/ISHWS/Wcf/API25/OutputFormat.svc>
- <https://example.com/ISHWS/Wcf/API25/PublicationOutput.svc>
- <https://example.com/ISHWS/Wcf/API25/Search.svc>
- <https://example.com/ISHWS/Wcf/API25/Settings.svc>
- <https://example.com/ISHWS/Wcf/API25/TranslationJob.svc>
- <https://example.com/ISHWS/Wcf/API25/TranslationTemplate.svc>
- <https://example.com/ISHWS/Wcf/API25/User.svc>
- <https://example.com/ISHWS/Wcf/API25/UserGroup.svc>
- <https://example.com/ISHWS/Wcf/API25/UserRole.svc>
- <https://example.com/ISHWS/Wcf/API20/Application.svc>
- <https://example.com/ISHWS/Wcf/API20/DocumentObj.svc>
- <https://example.com/ISHWS/Wcf/API20/EDT.svc>
- <https://example.com/ISHWS/Wcf/API20/EventMonitor.svc>
- <https://example.com/ISHWS/Wcf/API20/Folder.svc>
- <https://example.com/ISHWS/Wcf/API20/MetaDataAssist.svc>
- <https://example.com/ISHWS/Wcf/API20/OutputFormat.svc>
- <https://example.com/ISHWS/Wcf/API20/Publication.svc>
- <https://example.com/ISHWS/Wcf/API20/PublicationOutput.svc>
- <https://example.com/ISHWS/Wcf/API20/Reports.svc>
- <https://example.com/ISHWS/Wcf/API20/Search.svc>
- <https://example.com/ISHWS/Wcf/API20/Settings.svc>
- <https://example.com/ISHWS/Wcf/API20/Workflow.svc>
- <https://example.com/ISHWS/Wcf/API/Application.svc>
- <https://example.com/ISHWS/Wcf/API/ConditionManagement.svc>

## ISHSTS with Windows Authentication

You need to perform several settings before ISHSTS can provide Windows Authentication. Both server and SQL server database must be properly configured. You can either make these settings manually or use the scripts provided with the package.

ISHSTS is automatically configured through the installation.

InstallTool creates an application pool such as `TrisoftAppPoolISHSTS` based on the input parameter `infosharestswebappname`. The application pool is assigned an identity based on the input parameter `osuser`. This user is responsible for hosting the endpoints provided by ISHSTS.

For Windows Authentication endpoints to work, the following changes based on the requirements of `Service Principal Names` defined in the Active Directory must be made,

either manually or through a script.

---

**Note:** The following needs to be applied per installation server and are valid only for deployments that do not include network balanced front end servers

---

### Application pool identity

A change of the application pool identity in order to use the integrated `ApplicationPoolIdentity`. This changes the user who hosts the endpoints to an account that the correct Service Principal Names is assigned to. The expected Service Principal Names are

- `http/baseurl`
- `host/baseurl`

---

**Note:** The new user is identified locally as `IIS AppPool\infosharestswebappname` and it requires certain permissions to access resources. When this user accesses network resources it is identified as the computer account `Domain\Computer$` where the `Domain` and `Computer` are netbios based. e.g. `TESTDOMAIN\SERVER01$`

---

### Read permissions

Read permissions to the token signing certificate's private key are assigned to the `IIS AppPool\infosharestswebappname`. The token signing certificate in ISHSTS is configured through the `InstallTool` parameter `issuercertificatethumbprint`

Read/write permissions to the three target installation paths defined in the input parameters are assigned to the `IIS AppPool\infosharestswebappname`:

- `webpath`
- `datapath`
- `apppath`

### Integrated authentication

If the database is SQL Server and the connection string utilizes integrated authentication then we grant the computer account permissions to the database.

The only permission required is `SELECT`

## Configure application server for Windows Authentication

Here is how you execute the script that configures the server for ISHSTS with Windows Authentication.

### Before you begin

This task requires a PowerShell session that with `Execution Policy` set to `Unrestricted`.

If it is not set, you need to set it permanently by executing the following:

```
Set-ExecutionPolicy Unrestricted
```

The task requires administrator privileges.

---

**Note:** InstallTool has already transformed the script based on the input parameters.

---

### Procedure

1. Locate the PowerShell script `SDL.ISH-ISHSTS-Configure for Windows Authentication.ps1` in the folder `\InfoShare\App\Setup\STS\ISHSTS\Scripts`
2. Open PowerShell with elevated administrator privileges. Run As Administrator.  
If the PowerShell session is not running with administrator privileges, the script will launch a new session and administrator privileges will be requested to the user.
3. Navigate to the script folder `\InfoShare\App\Setup\STS\ISHSTS\Scripts`
  - a. `cd \InfoShare\App\Setup\STS\ISHSTS\Scripts`
4. Execute script `SDL.ISH-ISHSTS-Configure for Windows Authentication.ps1`
  - a. `.\SDL.ISH-ISHSTS-Configure for Windows Authentication.ps1`

### PowerShell session

```
cd \InfoShare\App\Setup\STS\ISHSTS\Scripts
& '.\SDL.ISH-ISHSTS-Configure for Windows Authentication.ps1'
```

## Configuring the Content Manager SQL Server database for Windows Authentication

Here is how you execute the script that allows the server's computer account to access a SQL Server database.

### Before you begin

The task applies for SQL Server database when the connection string used integrated authentication.

The task requires sysadmin rights on the SQL Server.

---

**Note:** InstallTool has already transformed the script based on the input parameters.

---

### Procedure

1. Locate the script `GrantComputerAccountPermissions.sql` in the `\InfoShare\App\Database\InfoShareCM\Common\` folder. Depending on your version of SQL Server:
  - For SQL Server 2019, the script path is `\InfoShare\AppPROJECTSUFFIX\Database\InfoShareCM\Common\SQLServer2019\Tools\GrantComputerAccountPermissions.sql`
  - For SQL Server 2017, the script path is `\InfoShare\AppPROJECTSUFFIX\Database\InfoShareCM\Common\SQLServer2017\Tools\GrantComputerAccountPermissions.sql`

where *PROJECTSUFFIX* is a suffix string.

2. Execute the script on the target SQL server instance.

### SQL Server script that grants necessary permissions

If the target database is INFOSHAREDB and the computer account is TESTDOMAIN\SERVER01\$ then the script looks like this:

```
USE [master]
GO
CREATE LOGIN [TESTDOMAIN\SERVER01$] FROM WINDOWS WITH DEFAULT_DATABASE=
[INFOSHAREDB]
GO
USE [INFOSHAREDB]
GO
CREATE USER [GLOBAL\MEDEVASARAFIA01$] FOR LOGIN [TESTDOMAIN\SERVER01$]
GO
USE [INFOSHAREDB]
GO
GRANT SELECT TO [TESTDOMAIN\SERVER01$]
GO
```

## Verifying the installation

Follow these procedures to test and verify the critical parts of the new Content Manager installation.

### About this task

In general the following should never result in an error and cause no harm on a production system. Testing more complex setups, such as the batch servers is out-of-scope.

---

**Note:** Before verifying the upgrade clean the internet browser cache to make sure that there are no leftovers from a previous version.

---

### Procedure

1. Sign in to Organize Space as an existing user.  
For example, go to <http://servername/ISHCS/OrganizeSpace/> and sign in using an existing username and password, or the admin name and password.
2. Test the inbox by going to **Content > Inbox** and selecting an inbox from the list.  
The test is successful if the contents of the inbox are displayed in the content pane as a list.
3. Create a folder in the repository:
  - a. On the top tab level, select the **Content** tab.
  - b. On the second tab level, select the **Structure Content** tab.
  - c. Create a folder by selecting **Add new > Folder**.
  - d. In the dialog that opens, enter a name and select the content type **None**.
  - e. Select **Save**.



The test is successful if the folder is created (shown in the folder tree on the left, and in the list on the right). After verifying, remove the folder after verifying by selecting it in the list and selecting **Delete** from the button toolbar.

4. Test publishing; if a publication is not available, skip this test.
  - a. On the top tab level, select the **Content** tab.
  - b. On the second tab level, select the **Structure Content** tab.
  - c. In the folder tree, navigate to a folder that contains a publication and double-click it in the list.
  - d. In the detail view of the publication that appears, expand a version and select a language and output.
  - e. Select **Publish**.  
A dialog opens, explaining that publishing has started. The publication output status changes to **Pending**.

The test is successful if the output status changes to **Draft**; refresh the view to confirm that the status changes to **Draft**.

5. Execute a full text search:
  - a. On the top tab level, select the **Content** tab.
  - b. On the second tab level, select the **Search** tab.
  - c. Enter a term in the input box.  
Be sure to enter a word that you know exists in your topics. For example, enter the search word: **the**.
  - d. Select **Search**.

The test is successful if search results are displayed in the right pane.

6. Verify web services, synchronization, and network availability by starting the Client Tools such as Publication Manager, Condition Manager or Authoring Bridge.

The test is successful if you can view the repository through the client tools and can view or preview a topic in the repository.

7. Verify requested customizations to your system such as PDF stylesheets, extra metadata, or extra development for integration with other systems (such as TMS, PLMs, SingleSignOns).

Ask your Content Manager administrator or documentation manager what customizations, if any, were requested.

## Verifying URLs

If your environment includes reverse proxy servers, after you install Content Manager, you need to check that certain URLs are accessible.

### Procedure

1. Using an internet browser, ensure that you can reach the following URLs:
  - *BaseURL*/ISHWS/Application.asmx?wsdl
  - *BaseURL*/ISHWS/Application.asmx?disco where *BaseURL* is the value specified for the `baseurl` parameter, and *ISHWS* is the value specified for the `infosharewebappname` parameter. These parameters are set in the `inputparameter.xml` file that is used by the Content Manager installer.
2. If you cannot access the URLs, verify that the reverse proxy servers are correctly configured. See the documentation for the reverse proxy servers.

## Verify read access to the database by viewing an inbox

To verify read access to the database, request to view an inbox in Organize Space.

### Procedure

1. Open an internet browser and enter the address for Organize Space.

---

**Note:** The Organize Space address is a combination of two parameter values in the parameters in the `inputparameters.xml` file, `baseurl` and `infosharecswebappname`, followed by the string `/OrganizeSpace/`

For example, if:

```
<param name="baseurl">  
<currentvalue>https://example.corp</currentvalue>
```

and

```
<param name="infosharecswebappname">  
<currentvalue>ISHCS</currentvalue>
```

then the URL is:

```
https://example.corp/ISHCS/OrganizeSpace/
```

---

Enter a Content Manager username and password. If you are not sure about the login/password and you imported the default database you can use **admin/admin** to login.

2. On the top tab level, select the **Content** tab.
3. On the second tab level, select the **Inbox** tab.
4. In the left pane, select an inbox. For example, select **Reviewer**.  
If no objects are in the inbox, an empty inbox is displayed; **There are no items to show** is reported in the content pane.  
If there are objects in the inbox, a list of objects is displayed in the content pane.

## Verify read and write access to the database by creating a folder

Create, modify, and delete actions are handled through transactions and verifies read and write access to the database.

### Procedure

1. Sign in to Organize Space as an existing user, for example as the administrator user.
2. On the top tab level, select the **Content** tab.
3. On the second tab level, select the **Structured Content** tab.
4. Select the **General** node and select **Add new > Folder**.  
An Add new folder dialog opens.
5. Enter a name in the **Folder Name** field. For example, enter the folder name **Test**.
6. Under **Content type**, select **None**.
7. Select **OK**.  
The folder is created and displayed in the left pane.

### What to do next

You can remove the test folder by selecting it in the list and then selecting **Delete** in the button toolbar. You are asked to confirm the delete action, select **Delete** to confirm and delete the folder.

## Creating an account and connecting to the Repository

Before you can use Content Importer, you need to set up your user account. If you installed Content Importer on a system where Publication Manager is already installed, the user account settings are recognized.

### Before you begin

You must create the user account and configure the connection to the Repository to allow a user to connect and access data in the Content Manager Repository. Use this procedure to create a new user account for testing purposes.

To create the account and connect to the Repository, you need the URL of the Content Manager web services.

### Procedure

1. In Content Importer, select **Create an account**.  
The account window is displayed.
2. Enter an **Account Name** and the URL of the Content Manager **Web Service**.
3. Select **Next**.
4. If necessary, select the **Authentication Method**.
5. Enter the username and password.  
Check **Remember password** if you do not want to enter the information each time you use the application.

6. Select **Next**.

Content Manager validates the account and synchronizes files.

## Running a client tool

When started, the client tools verify availability of the synchronization website and web services.

### Before you begin

- A desktop client workstation must be installed with the client tools. If not done, refer to the section for installing desktop clients.
- The client tool must be configured with a user login and account.
- To fully test the client, the database should contain data.

### Procedure

1. If necessary, create an account and connection to the repository.
2. Start a client tool such as Publication Manager, Condition Manager or Authoring Bridge from the **Start** menu or desktop shortcut.

If you can view and access the repository through the client tool, and can view or preview a topic in the repository then web services, synchronization, and network availability have been successfully verified.

## Testing publishing

You can test the publish functionality if your database contains topics, maps and publications, and it is configured to render an output type.

### Before you begin

If your database is not configured to render an output, refer to the [Content Manager Information Portal](#) documentation for information about adding output formats.

### Procedure

1. Sign in to Organize Space as an existing user, say, the administrator.
2. On the top tab level, select the **Content** tab.
3. On the second tab level, select the **Structured Content** tab.
4. In the folder tree, navigate to a folder that contains a publication you want to publish.
5. In the list, double-click the publication.  
A detail view of the publication appears.
6. Expand the version of the publication that you want to publish, and select language and output for the publication version.
7. Select **Publish** in the button toolbar at the top.  
A dialog reports that publishing has started, and invites you to see event details.
8. To display progress, select **View event details** or select **Refresh** in the button toolbar above the list.

When viewing event details, verification is complete when the Event Description is **Publish Process ended** and the status says **SUCCESS**.

## Executing the full text search

You can test the search functionality if the database contains content.

### Procedure

1. Sign in to Organize Space.
2. On the top tab level, select the **Content** tab.
3. On the second tab level, select the **Search** tab.
4. Think of a word that frequently occurs in your content, enter that word in the **Search for** field and press **Enter** (or select **Apply**).

If there is no search result, verify if a rebuild of the full-text-index collection is required. Note that the full-text-index collection is not immediately available after installation since it takes some time to build.

## Verifying customer specific components

If you requested customizations of the out-of-the-box Content Manager software, a check that they were delivered is recommended at this time.

### About this task

Customizations of the delivered software may be, for example, PDF stylesheets, extra metadata, or extra development to integrate with other systems such as SDL-TMS, PLMs, SingleSignOns.

If you contracted for additional customizations, check that they were delivered and functioning as required.

# System management reference for Content Manager upgrade

A few system management concepts are good to know in the context of a complex Content Manager upgrade.

## Server roles

An overview of the different server roles which can be recognized within a Content Manager installation

In a standard Content Manager installation some functionality relies on the combination of some components and configurations. The combination of components and configurations which provide a specific functionality are referenced as a "server role".

### Web role

The web role provides all web endpoints like the web site, the web services and the internal security token service

The web role provides the following web endpoints

- **ISHCS** which is the Organize Space web application
- **ISHWS** which hosts all web services
- **ISHSTS** which is the internal Security Token Service
- **ISHCM** which is used for hosting MVC pages and other files for Client Tools synchronization files

Since the **Web role** is required on every Content Manager installation, an out-of-the-box Content Manager installation will enable all web endpoints.

The **Web role** is used to serve external clients, but it is also used to serve the internal roles like the Translation role and the Default background task role. When it is used for external web endpoints, the **Web role** can be scaled out via Network Load Balancing (NLB).

### Full text indexing role

This role groups everything for the full text search functionality by SolrLucene

The full text indexing role contains all components for the full text search functionality.

- The **Trisoft InfoShare SolrLucene** windows service that hosts and controls **SolrLucene**.
- The **Trisoft InfoShare Crawler** windows service that is responsible for gathering all data that needs to be indexed by **SolrLucene**.

### How to enable the full text indexing role?

Execute the following steps in the described order to enable the full text indexing role:

- Goto **Start > Administrative Tools > Services**
- Goto the **Trisoft InfoShare SolrLucene** windows service
  - Open the **Properties**
  - Set the **Startup type** to *Automatic (Delayed Start)*
  - Click OK
  - Start the service
- Goto the **Trisoft InfoShare Crawler One** windows service
  - Open the **Properties**
  - Set the **Startup type** to *Automatic (Delayed Start)*
  - Click OK
  - Start the service
- If the server can handle more load, you can also start the **Trisoft InfoShare Crawler Two** windows service.

## Remarks

We strongly advise you to allow only one deployment of this role per database. Typically this role is installed next to one of the Web roles, but it can also be a dedicated server.

## Default background task role

This role provides everything which is necessary to execute all possible background tasks

The *default background task role* runs the **Trisoft InfoShare BackgroundTask One** service configured with a role that contains all possible `eventTypes`.

## Prerequisites

Out of the box, the **Trisoft InfoShare BackgroundTask One** service is configured with the `Default` role, which contains all possible `eventTypes`. With this configuration, starting the **Trisoft InfoShare BackgroundTask One** service is enough to enable the default background task role.

However, should you wish to double-check the configuration, do the following:

1. Go to **Start > Administrative Tools > Services**
2. Right-click the **Trisoft InfoShare BackgroundTask One** service, and from the context menu, select **Properties**.
3. Check the value for **Path to executable**. The value should contain something like:

```
C:\InfoShare\App\BackgroundTask\Bin\BackgroundTask.exe --service
"Trisoft InfoShare BackgroundTask One" Default
```

The last parameter in the command line is the name of the service role. Out of the box, the role is `Default`.

4. Sign in to Organize Space.
5. From the top tab level, select the **Settings** tab.
6. From the second tab level, select the **XML Settings** tab.
7. From the third tab level, select the **Background Tasks** tab.
8. Find all `eventType` values by checking that attribute in the XPath `handlers/ handler`.
9. Go to the server definition with the role used by the service (e.g. "Default") and check that all `eventTypes` from the previous step are referenced in one of the groups. If necessary, add the missing `eventTypes`.

---

**Note:** If you had to change the configuration, you need to restart all **Trisoft InfoShare BackgroundTask** services on all servers.

---

Make sure that all required third-party software is installed and configured properly on this server, because if one of the dependencies is not present, the background tasks will fail.

### How do I enable the default background task role?

Execute the following steps to enable the default background task role:

- Go to **Start > Administrative Tools > Services**.
- Right-click the **Trisoft InfoShare BackgroundTask One** item and from the context menu, select **Start**.

### How do I scale out?

There are two ways of scaling out the **Trisoft InfoShare BackgroundTask** service:

- Adding extra services with the same role
- Introducing specialized roles with a limited set of `eventTypes`.

## Translation role

This role provides everything for the translation related functionality.

The `Translation` role groups all components which are required for the translation related functionality:

- The **Trisoft InfoShare BackgroundTask One** service running with a role that minimally includes the following `eventTypes`:
  - `CREATETRANSLATIONFROMREPORT`
  - `CREATETRANSLATIONFROMLIST`
  - `CREATETRANSLATION`
  - `RELEASETRANSLATIONS`

These background tasks will create the necessary target language objects which can be used by the `TranslationBuilder` to be sent for translation

- The **Trisoft InfoShare TranslationBuilder One** service will group all language objects which needs to be translated for a specified translation job
- Finally, the **Trisoft InfoShare TranslationOrganizer One** service will
  - send the files to the configured translation service (TMS, WorldServer, ...)
  - retrieve the translated files back from the translation service (TMS, WorldServer, ...)
  - submit the translations back into the Content Manager repository

### How to enable the translation role?

There are two possible scenario's for the translation role:

- Use the translation role on a dedicated translation server
- Use the translation role in combination with "Default background task role " on page 47

In the first scenario, you need to configure a new service role in **Background Tasks**

1. Sign in to Organize Space as an administrator user
2. Click **Settings > XML Settings > Background Tasks**.
3. Add an extra service definition with role `Translation`



```

<service role="Translation">
  <matrix>
    <group name="Translations" maxExecutions="2">
      <handlers>
        <add ref="CREATETRANSLATIONFROMREPORT" />
        <add ref="CREATETRANSLATIONFROMLIST" />
        <add ref="CREATETRANSLATION" />
        <add ref="RELEASETRANSLATIONS" />
      </handlers>
    </group>
  </matrix>
  <leaseRecovery isEnabled="true" interval="00:05:00" />
  <poller isEnabled="true" interval="00:00:10" />
  <aggregationRecovery isEnabled="true" gracePeriod="00:10:00" interval="00:10:00" maximumRetries="3" />
</service>

```

4. Adapt **Trisoft InfoShare BackgroundTask One** service to use the role `Translation`.

For both scenario's you can now continue with the following steps:

1. Configure the **TranslationBuilder** and the **TranslationOrganizer**.
2. Start all services
  - Go to **Start > Administrative Tools > Services**
  - Start the **Trisoft InfoShare TranslationBuilder One** service
  - Start the **Trisoft InfoShare TranslationOrganizer One** service
  - Start the **Trisoft InfoShare BackgroundTask One** service (if it is not running already)

## Publish role

This role is the sub set of the default background task role that is responsible for exporting and publishing.

The *publish role* runs the **Trisoft InfoShare BackgroundTask** service configured with a role that contains the following `eventTypes`

- PUBLISH
- PUBLISHDITADELIVERY
- PUBLISHCONTENTDELIVERY
- INBOXEXPORT
- REPORTEXPORT
- SEARCHEXPORT
- PUBLICATIONEXPORT

## Prerequisites

Make sure that all required third-party software is installed and configured properly on this server, because if one of the dependencies is not present the background tasks will fail.

## How to enable the publish role?

- Configure the role in the XML settings for background tasks:
  1. Sign in to Organize Space as an administrator-level user.
  2. Go to **Settings > XML Settings > Background Tasks**.
  3. Add an extra service definition with role `Publish`:

```
<service role="Publish">
  <matrix>
    <group name="Export" maxExecutions="2">
      <handlers>
        <add ref="INBOXEXPORT" />
        <add ref="REPORTEEXPORT" />
        <add ref="SEARCHEXPORT" />
        <add ref="PUBLICATIONEXPORT" />
        <!-- New publish -->
        <add ref="PUBLISH" />
        <add ref="PUBLISHDITADELIVERY" />
        <add ref="PUBLISHCONTENTDELIVERY" />
        <!-- Legacy publish -->
        <add ref="EXPORTFORPUBLICATION" />
      </handlers>
    </group>
  </matrix>
  <leaseRecovery isEnabled="true" interval="00:05:00" />
  <poller isEnabled="true" interval="00:00:10" />
  <aggregationRecovery isEnabled="false" gracePeriod="00:10:00"
    interval="00:10:00" maximumRetries="3" />
</service>
```

- Create a **Trisoft InfoShare BackgroundTask** service with the role `Publish`.
- Start the service.

## Best practices for creating a Trisoft InfoShare BackgroundTask service with a specific role

The topic described how to create a Trisoft InfoShare BackgroundTask service with a specific role

Of course, there are multiple ways to make a **Trisoft InfoShare BackgroundTask** service run with a specific role.

However, if possible try to create the **Trisoft InfoShare BackgroundTask** service immediately with the correct role configured by adapting the install plan.

If you want to adapt the role of an existing background task service after the installation, refer to the corresponding section in the documentation.

## How to create a new BackgroundTask service with a role

This topic explains how to adapt the install plan to create a Trisoft InfoShare BackgroundTask service with the specified service role.

### Before you begin

- There is no Content Manager installation yet.
- Check the name of the service role via **Settings > XML Settings > Background Tasks**. If the name is `newServiceRole`, there should be a XML fragment like the following:

```
<service role="newServiceRole">
  <matrix>
    ...
  </matrix>
  <leaseRecovery isEnabled="true" interval="00:05:00" />
  <poller isEnabled="false" interval="00:00:10" />
  <aggregationRecovery isEnabled="false" gracePeriod="00:10:00" interval="00:10:00" maximumRetries="3" />
</service>
```

### About this task

The following procedure describes how to adapt the out-of-the-box configuration of the Trisoft InfoShare BackgroundTask One windows service before installing. Of course, you can also add extra services by adapting the install plan.

### Procedure

1. Open the install plan (`_InstallTool\installplan.xml`) from a Content Manager CD
2. Goto to the service definition for `Trisoft-InfoShare-BackgroundTask`

```
<serviceapp name="Trisoft-InfoShare-BackgroundTask">
  <servicename>Trisoft InfoShare##installtool:PROJECTSUFFIX##
  BackgroundTask One</servicename>
  <filepath>##installtool:APPPATH##\App##installtool:PROJECTSUFFIX##
  \BackgroundTask\Bin\BackgroundTask.exe --service "Trisoft
  InfoShare##installtool:PROJECTSUFFIX## BackgroundTask One" Default</
  filepath>
  ...
</serviceapp>
```

3. Replace the `Default` role with `newServiceRole`

```
<serviceapp name="Trisoft-InfoShare-BackgroundTask">
  <servicename>Trisoft InfoShare##installtool:PROJECTSUFFIX##
  BackgroundTask One</servicename>
  <filepath>##installtool:APPPATH##\App##installtool:PROJECTSUFFIX##
  \BackgroundTask\Bin\BackgroundTask.exe --service "Trisoft
  InfoShare##installtool:PROJECTSUFFIX## BackgroundTask One"
  newServiceRole</filepath>
  ...
</serviceapp>
```

4. Save the modified install plan

## Results

An install plan that will install a Trisoft InfoShare BackgroundTask One windows service with the specified service role

## How to adapt the role of an existing BackgroundTask service

This topic explains how to adapt the role of an existing Trisoft InfoShare BackgroundTask service.

### Before you begin

Check the name of the service role via **Settings > XML Settings > Background Tasks**.

If the name is `newServiceRole`, there should be a XML fragment like the following:

```
<service role="newServiceRole">
  <matrix>
    ...
  </matrix>
  <leaseRecovery isEnabled="true" interval="00:05:00" />
  <poller isEnabled="false" interval="00:00:10" />
  <aggregationRecovery isEnabled="false" gracePeriod="00:10:00" interval="00:10:00" maximumRetries="3" />
</service>
```

---

**Warning:** Using Registry Editor incorrectly can cause serious problems that may require you to reinstall your operating system.

---

### Procedure

1. Modify the `Default` service role configured for the Trisoft InfoShare BackgroundTask One windows service.
  - a. Open the Registry Editor with Administrator rights.
  - b. Open the key `HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Trisoft InfoShare BackgroundTask One`.
  - c. Open the value with name `ImagePath`.  
The current data looks like.

```
D:\InfoShare\App\BackgroundTask\Bin\BackgroundTask.exe --service
"Trisoft InfoShare BackgroundTask One" Default
```

where `Default` is the default service role name configured out-of-the-box and present in the XML Background Task Settings.

- d. Edit the data and change `Default` to the new service role name `newServiceRole`  
The data should now look like.

```
D:\InfoShare\App\BackgroundTask\Bin\BackgroundTask.exe --service
"Trisoft InfoShare BackgroundTask One" newServiceRole
```

- e. Save the data.

At this point we have configured the Trisoft InfoShare BackgroundTask One windows

service to run with the `newServiceRole`.

2. Start the `Trisoft InfoShare BackgroundTask One` windows service

## Firewalls and blocked ports

There is a variety of possibilities regarding network and firewall configurations. Only some of typical firewall configurations are described. A user knowledgeable about networking can infer the required ports and protocol settings needed for more complex configurations.

---

**Note:** The following description is intended to guide you in your network and firewall configuration. Its intention is not to be a complete how-to guide for setting up firewalls. Several settings are subject to change in newer software versions. Be certain to refer to the latest reference materials.

---

### Network configuration using a single firewall

The first firewall is located between the Internet and the internal network

This is the first line of protection from the world wide web. All information passed through the Content Manager web sites or web services are based on the HTTPS protocol.

The techniques described in the section for HTTPS (SSL) could be required depending on the task of the Content Manager server.

### Network configuration using two firewalls

The first firewall is located between the Internet and the DMZ as described above and the second is located between the DMZ and the intranet

The second line of protection protects servers which are open to the general public from the more critical company intranet servers. The zone between the first and second line of protection is also called the DMZ (DeMilitarized Zone).

The following techniques could be required depending on the task of the Content Manager server

- SMTP - when SMTP communication is required
- Database engines
  - Microsoft SQL Server access is required
  - Oracle RDBMs access is required
- HTTP(S)

## SMTP

Ports and protocols used by the Simple Mail Transfer Protocol (SMTP).

Simple Mail Transfer Protocol (SMTP) is the standard for e-mail transmissions across the internet. Formally SMTP is defined in RFC 821 (STD 10) as amended by RFC 1123 (STD 3) chapter 5. The protocol used today is also known as ESMTP, and it is defined in RFC 2821.

Used by:

- Content Manager Publishing components
- Content Manager Author components

Settings:

What	Protocol	Port	Direction
SMTP	TCP	25	IN/OUT

For more information, refer to:

- <http://msdn2.microsoft.com/en-us/library/ms942998.aspx>
- <http://en.wikipedia.org/wiki/SMTP>

## Microsoft SQL Server ports

Ports and protocols used by Microsoft SQL Server database engine (SQLServer).

### About this task

Microsoft SQL Server is a relational database management system (RDBMS) produced by Microsoft. Its primary query language is Transact-SQL, an implementation of the ANSI/ISO standard Structured Query Language (SQL) which is used by Microsoft. You need to allow distant users to connect to the SQL server so they can address it their queries.

SQL Server is used by:

- Content Manager End User components;
- Content Manager Author components;
- Content Manager Database.

---

**Note:** The first step of this procedure is sufficient in most cases. Go through the other steps if you encounter any issue.

---

## Procedure

1. Enable remote connections to your SQL Server.
  - a. Open **SQL Server Management Studio**.
  - b. Right-click your server's name and select **Properties**.
  - c. Tick the checkbox **Allow remote connections to this server**.
  - d. Select **OK**.

Microsoft SQL Server by default uses TCP 1433 but this can be changed using **SQL Server Enterprise Manager** or the database **Management Studio**.

2. Enable TCP/IP.
  - a. Open the **SQL Server Configuration Manager**.
  - b. In **SQL Server Network Configuration** select **Protocols for [yourServerInstance]**.
  - c. In the right-hand pane, make sure that **TCP/IP** is **Enabled**.
3. Open the 1433 port in your firewall.
  - a. In the **SQL Server Configuration Manager**, right-click *TCP/IP* and select **Properties**.
  - b. Select the **IP Addresses** tab and make sure the *TCP Port* for *IP1* is 1433.
4. If you are using a named instance, create an extra rule in your firewall with the port 1434.

---

**Note:** For a named SQL Server instance (e.g. [yourServerInstance] \ SQL2012SP2), the firewall needs an extra rule on the UDP protocol with the specific port 1434. Without this rule the system will return the exception error: 26 - Error Locating Server/Instance Specified.

---

- a. Display the firewall advanced settings by navigating to **Control Panel > System and Security > Windows Firewall > Advanced settings**.
- b. Select **Inbound Rules** in the left-hand pane, then click **New Rule** in the right-hand pane.
- c. In the **New Inbound Rule Wizard, Rule Type step**, select **Port**.
- d. **Protocols and Ports** step, select **UDP** and set **Specific local ports** to 1434.
- e. **Action** step, select **Allow the connection**.
- f. **Profile** step, tick the **Domain** checkbox.
- g. **Name** step, enter a name for this rule, e.g. Named instance port 1434.
- h. Select **Finish**.

## What to do next

For more information, refer to:

- <http://support.microsoft.com/kb/287932>
- <http://msdn.microsoft.com/en-us/library/ms942998.aspx>

## Oracle RDBMS

Ports and protocols used by the Oracle RDBMS.

Oracle Database, Oracle RDBMS, or simply Oracle is a relational database management system (RDBMS) software product released by Oracle Corporation that has become a major feature of database computing.

Used by:

- Content Manager End User components
- Content Manager Author components
- Content Manager Database

The Oracle database server communicates with the Content Manager application server using a port, so make sure this port is opened IN/OUT in your firewall. The port by default is 1521.

What	Protocol	Port	Direction
Listener (runs on the database server)	TCP	1521 (default)	IN/OUT

## HTTPS (SSL)

Ports and protocols used by Microsoft Internet Information Server (IIS).

HTTPS is a URI scheme used to indicate a secure HTTP connection. It is syntactically identical to the `http://` scheme normally used for accessing resources using HTTP. The `https:` URL indicates that HTTP is to be used but with a different default TCP port (443) and an additional encryption/authentication layer between the HTTP and TCP.

HTTPS is not a separate protocol, but refers to the combination of a normal HTTP interaction over an encrypted Secure Sockets Layer (SSL). An `https:` URL may specify a TCP port. If it does not, the connection uses port 443.

Used by:

- Content Manager End User Website
- Content Manager Author Website
- Content Manager WebServices

Settings:

What	Protocol	Port	Direction
HTTPS	TCP	443	IN/OUT



## Background tasks

A background task is an application logic that is triggered on certain events, does not require user interaction and runs in a background by a background task service. Typical example is publishing process: it has to be triggered by user, but after it is triggered, it does not require user input neither does it require user to wait. Instead, the publishing process runs in a background, and user can know that it is finished by periodically checking the status of a publication.

### Starting background tasks

Typically, background tasks are created by plugins. For example, it is possible to register a plugin that will run when user changes the status of the topic and create the background task. Typically, background task does not start executing immediately after it is created. Instead it is added to the queue from where it can be later picked up by a background task service which executes the task. This allows better distribution of load since the task can be picked up by the service (or server, because background task services can run on different servers) which is less busy.

### Executing background tasks

There is only one background tasks queue which is available to every background task service. Under the hood, it is implemented as a database table, which means that once added, task will not get lost. Practically it means that task will survive the server reboot, and even if the task execution fails in the middle, task remains in the queue and can be re-started.

Every background task has an event type it is created for. For example, when you trigger the publish, there will be a background task created with event type `EXPORTFORPUBLICATION`. Tasks can be picked up by one of the installed background task services. You can limit event types that service is allowed to pick and amount of background tasks with the same event type that can be executed in parallel.

When task fails for one reason or another, it is automatically retried later. You can adjust this behavior by changing the limit of retry attempts.

### Monitoring background tasks

Typically, background tasks update the status of the execution by writing to the event log. For example, background task that executes publishing will update the corresponding Publish event.



There is only one queue for background tasks. There can be any number of background task services picking up tasks.

# Overview of the background task configuration

The background task configuration contains all information for running background task services and handling background tasks.

## Introduction

The configuration is stored inside the Content Manager database and is accessible via Organize Space by going to **Settings > XML Settings > Background Tasks**.

---

**Tip:** For detailed information, check the `Admin.XMLBackgroundTaskConfiguration.xml` file.

---

## Configuration for the background task services

The configuration can contain different types of services. Every background service runs with a specific *role*. For every role the configuration describes the behavior:

- Should the service execute background tasks?
- How often should it poll for a new background task?
- Should the service recover failed background tasks?

If the service is configured to execute background tasks, the configuration specifies for which groups of event types the service is responsible. The configuration defines for every group how many background tasks are allowed to run in parallel.

Out-of-the-box, the services are installed with the 'Default' role and will pick up all possible background tasks. However, it is possible to configure for instance a service with the role 'Publish' picking up only the background tasks with event type *EXPORTFORPUBLICATION*

## Configuration for the handlers

The configuration contains a list with handlers. Each handler is handling one *eventType* and can be executed synchronously or asynchronously. The handler is responsible for (1) starting the activator which will execute the background task and (2) handling any exception which occurs.

Per type of activator, the configuration not only contains the necessary information to create and run the activator, but it also contains the configuration with parameters that are used during the execution of the background task.

---

**Note:** These parameters can contain (environment) variables that are resolved by the background task service configuration.

---

The configuration also specifies if the background task must be executed within the same process (of the service) or within a new process, and for how long the background task is allowed to execute. Each background task is executed within the security context of the user that submitted the background task. How the security context is created depends on the authorization type.

When the execution of the background fails, the configuration indicates for each error number if the background task must be retried and how many times the background task can be scheduled to re-execute.

## Usage of variables inside the background task configuration

Referencing environment variables inside the background task configuration is useful when exact configuration value varies from server to server and therefore cannot be single-sourced. Environment variables are resolved at the moment background task service is being initialized with the actual values set on that specific server.

Normally background task gets its parameters from the background task configuration. This way the background task parameters are defined in a single place and can be easily accessed by the task regardless of which server or service executes it.

However, sometimes it is not easy (or even possible) to provide a value that would work on every server. The typical case is the file path, which may differ from one server to another. For example, PUBLICATIONEXPORT event type needs to know the export location, which can be a different folder depending which server picks up the task.

To solve this problem, background task configuration allows referencing environment variables. Environment variable can be provided as a value of any element or attribute.

**PUBLICATIONEXPORT references %ISHPROJECTDATAPATH% in the value of exportlocation and exportspeclocation parameters.**

```
<handler eventType="PUBLICATIONEXPORT">
<scheduler executeSynchronously="false" />
<authorization type="authenticationContext" />
<execution timeout="01:00:00" recoveryGracePeriod="00:10:00"
isolationLevel="Process" useSingleThreadApartment="true" />
<activator>
<comIEEventHandler projectName="IshPluginsIso" className="cout">
<configuration>
<parameters>
<parameter name="exportlocation" type="value">%ISHPROJECTDATAPATH%
\ExportService\Data\DataExports</parameter>
<parameter name="exportspeclocation" type="value">%ISHPROJECTDATAPATH%
\ExportService\Data\WatchFolder</parameter>
<parameter name="separateInlg" type="value">yes</parameter>
<parameter name="requestedmetadata" type="ishfields">
<ishfields>
<ishfield name="FSTATUS" level="lng" />
</ishfields>
</parameter>
<parameter name="raiseevent" type="value">ZIPFILES</parameter>
<parameter name="filenameprefix" type="ishfields">
<ishfields>
<ishfield name="FTITLE" level="logical" />
</ishfields>
</parameter>
</parameters>
</configuration>
</comIEEventHandler>
</activator>
<errorHandler maximumRetries="0" />
</handler>
```

When the background task service is being initialized, every environment variable is replaced with the actual value.

---

**Remember:** It is your responsibility to make sure that every environment variable referenced in the background task configuration is set!

---

---

**Remember:** Setting environment variable to empty string deletes the environment variable!

---

The easy way to set the environment variables for the lifetime of the background task service is to add them to the background task service configuration file. The file is located on the Content Manager server: `\InfoShare\App\BackgroundTask\Bin\BackgroundTask.exe.config`

Variables are configured in the **variables** element within the section **trisoft.infoShare.backgroundTask**. Background task service will read these values during initialization and use them to set the actual environment variables.

### Providing the environment variable values for PUBLICATIONEXPORT in the background task service configuration file.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <configSections>
    <section name="trisoft.infoShare.backgroundTask" type="Trisoft.
InfoShare.BackgroundTask.BackgroundTaskConfigurationSection, Trisoft.
InfoShare.BackgroundTask, Version=11.0.0.0, Culture=neutral,
PublicKeyToken=555d9fcb450e0935"/>
    <!-- Other <section> and <sectionGroup> elements. -->
  </configSections>
  <startup>
    <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.5" />
  </startup>
  <trisoft.infoShare.backgroundTask>
    <variables>
      <!-- Value cannot be an empty string! -->
      <add key="ISHPROJECTAPPPATH" value="C:\InfoShare\App" />
      <add key="ISHPROJECTDATAPATH" value="C:\InfoShare\Data" />
    </variables>
  </trisoft.infoShare.backgroundTask>
</configuration>
```

## Understanding the availability matrix

The availability matrix defines which types of events, and how many of their instances, the background task service is allowed to execute in parallel.

Executing background tasks consumes system resources, most importantly CPU time and system memory. Deciding which kind of tasks and how many instances of them are allowed to run in parallel on the same server is important because this will affect stability, throughput and overall system performance.

This decision is a trade-off: on the one hand, increasing the task parallelism can increase the throughput (more tasks are executed within the same amount of time), but on the other hand, it puts the system under pressure and may even result in situations when your process on the server runs out of memory.

The availability matrix is configured in the background task configuration, per server role, under the `matrix` element. The default background task configuration is located in `\Websites\Author\EnterViaUI\Admin.XMLBackgroundTaskConfiguration.xml`, which is delivered with the release and contains the latest suggested out-of-the-box values for the matrix. You can also find the contents of this file in Organize Space under **Settings > XML Settings > Background Tasks**.

Here is an example of a `matrix` section for a server role:

```
<matrix>
  <group name="Translations" maxExecutions="2">
    <handlers>
      <add ref="CREATETRANSLATIONFROMREPORT" />
      <add ref="CREATETRANSLATIONFROMLIST" />
      <add ref="CREATETRANSLATION" />
      <add ref="RELEASETRANSLATIONS" />
    </handlers>
  </group>
  <group name="Export" maxExecutions="2">
    <handlers>
      <add ref="EXPORTFORPUBLICATION" />
      <add ref="INBOXEXPORT" />
      <add ref="REPORTEXPORT" />
      <add ref="SEARCHEXPORT" />
      <add ref="PUBLICATIONEXPORT" />
    </handlers>
  </group>
  <group name="SynchronizeToLiveContent" maxExecutions="1">
    <handlers>
      <add ref="SYNCHRONIZETOLIVECONTENT" />
    </handlers>
  </group>
  <group name="Others" maxExecutions="2">
    <handlers>
      <add ref="THUMBNAILSUBMIT" />
      <add ref="ISHBATCHIMPORT" />
    </handlers>
  </group>
</matrix>
```

The matrix defines groups of handlers with common features, requirements or functionality. For every group, the `maxExecutions` attribute specifies how many instances of the specified background task handler can be executed concurrently. The availability matrix works proactively by controlling what the background task service will poll each time. Only tasks that are valid for the current state of execution and the availability matrix are allowed to begin executing.

Here is an example flow to better understand what happens when the service begins to execute.

Looking at the first group, `Translations`, the service will try to execute any background task with the configured handler, for example `CREATETRANSLATIONFROMREPORT`. While a `CREATETRANSLATIONFROMREPORT` instance is executing, the service is allowed to pick one more item from the queue matching the configured handlers of this specific group (including `CREATETRANSLATIONFROMREPORT`), for example, `RELEASETRANSLATIONS`. As long as both background tasks are executing, the service is not allowed to execute any more from this group because the limit 2, defined in `maxExecutions` attribute, is reached. Once one of the tasks has finished, the service is allowed once again to execute background tasks from the this group. The above reasoning is applied to every configured group and the service will always try to execute a background task from any group that still hasn't reached its `maxExecutions` limit.

---

**Important:** You can only put one event type in one group. If you configure the same event type in 2 different groups, you will get an error when trying to submit this configuration.

---

The default background task configuration comes with two background task service roles, `Default` and `Console`. The `Console` background task service role is optimized for testing through the console mode. This role has only one group, containing all background tasks, and is configured to restrict the process to execute at most one background task at any given time.

## Understanding the isolation level of the handler

Explains the significance of isolation level configuration value for a background task handler.

Every handler configuration in the `Background task XML settings` defines an `isolationLevel` within the `execution` element .

The isolation level is allowed to have one of the following values

- `None`
- `Process`

When the value is `None` then all background tasks of this handler will execute within the process of the background task service.

Every operating system process has a limited amount of resources that it can access. With the background task service, we are interested in the memory limitation. The process's maximum memory must be shared between the requirements of the service's components but also the running background tasks.

There is also the potential of memory leaks than can be caused by a background task. Although the background task service is optimized against memory leaks it can run out of memory because a background task had misused the memory.

Different combinations can result to an unstable background task service process or handler that runs out of memory. To protect the background task service but also provide an isolated memory space to a specific background task, the `Process` value was introduced for the `isolationLevel`. When this configuration is enabled for a handler, the background task service will spawn a new process with the sole goal to execute this specific background task instance. This way the execution is isolated within the memory space of a specific process that is dedicated fully for the background task. Also any memory leak caused by the handler's execution is limited to the lifetime of this process and has no effect to the background task service process. There is an overhead though. A new process means that everything has to be loaded resulting to slower startup times of the actual execution. The total overhead depends on the load on the server.

This way the handler receives maximum memory space and also the background task service is protected against memory leaks. The only tradeoff is a potential overhead in the total execution time.

Based on the above, here are some suggestions to help you get to the correct value for `isolationLevel` of a handler:

- If the handler of the background task requires a lot of memory then it must be isolated.
- If the handler has the potential to execute for long then it should be isolated.

- Choosing `Process` for the `isolationLevel` should take into account the overhead of the startup time compared to the average actual execution time of the handler

Out of the box configuration has all handlers configured to execute with `isolationLevel` set to `None`. Only for `EXPORTFORPUBLICATION` is configured to execute with `isolationLevel` set to `Process` because it is very memory intensive. Because it has the potential to execute for long the extra overhead in startup time is small relative to the average expected execution time.

## Installing desktop client tools

You can choose to install desktop client tools (Authoring Bridge, Publication Manager, Condition Manager and Content Importer) based on the role and responsibilities of the user. The versions of the desktop clients tools must match the version of Content Manager installed on the server.

## Installing the Authoring Bridge

The Authoring Bridge is used to access the repository using an authoring tool.

### About this task

Choose the Authoring Bridge installer for the XML editor software that you are using (XMetaL or Oxygen). The type and version of the editor you are using must be supported by the installed version of Content Manager.

If an incompatible version of the .NET runtime framework is installed, the installer will install a correct one after your validation.

The install package's names match the following format, one for each compatible XML Editor:

- `<date>.AuthoringBridge.<version>-XMetaL-Connector.msi`
- `<date>.AuthoringBridge.<version>-oXygen-Connector.msi`

The development kit's executable name matches the following format:

- `<date>.AuthoringBridgeSDK.<version>.exe`

### Procedure

1. Double-click the Authoring Bridge install package, or **Setup Wizard**, and follow the proposed list of steps. After you hit the **Finish** button, the installation is complete and the Tridion Docs menu is now available in your authoring tool's menu bar.

### Results

When you first try to access the Repository from your authoring tool, you will be requested to specify a user account in order to establish the connection.

For uninstall, be aware of the following:

- If you are using XMetaL on Windows, you must uninstall the Authoring Bridge before uninstalling XMetaL.
- If the Authoring Bridge is uninstalled, the Tridion Docs menu will remain in the menu bar, with all menu options greyed out. You must start XMetaL while pressing the **CTRL** key in order to have XMetaL clean up the menu bar and remove the Tridion Docs menu.

## Installing Publication Manager

The publication manager is used to create, modify, check the status of, and produce publications in various formats.

### About this task

If an incompatible version of the .NET runtime framework is installed, the installer will install a correct one after your validation.

The install package's name matches the following format: <date>.PublicationManager.<version>.msi

### Procedure

1. Double-click the Publication Manager install package, or **Setup Wizard**, and follow the proposed list of steps. After you hit the **Finish** button, the installation is complete and Publication Manager is now available for you to use.

## Installing Condition Manager

The Condition Manager is used to create and manage conditions for your publications.

### About this task

If an incompatible version of the .NET runtime framework is installed, the installer will install a correct one after your validation.

The install package's name matches the following format: <date>.ConditionManager.<version>.msi

### Procedure

1. Double-click the Condition Manager install package, or **Setup Wizard**, and follow the proposed list of steps.
2. Select the **Enable Synchronization** option when proposed (on the tab where you specify the installation folder). Content Manager can synchronize the set of conditions with definitions from another system. Synchronization needs to be configured separately, **Enable Synchronization** only makes the menu items available in the application.
3. After you hit the **Finish** button, the installation is complete and Condition Manager is now available for you to use.



## Installing Content Importer

Content Importer helps you import content through Organize Space commands.

### About this task

If an incompatible version of the .NET runtime framework is installed, the installer will install a correct one after your validation.

The install package's name matches the following format: *DATE.ContentImporter.VERSION.msi*, where *DATE* is a date and *VERSION* is the version of Content Importer.

### Procedure

1. Double-click the Content Importer install package, or **Setup Wizard**, and follow the proposed list of steps. After you hit the **Finish** button, the installation is complete.





# Acknowledgments

Tridion Docs products include open source or similar third-party software.

### **7zip**

Is a file archiver with a high compression ratio. 7-zip is delivered under the GNU LGPL License.

### **7zip SFX Modified Module**

The SFX Modified Module is a plugin for creating self-extracting archives. It is compatible with three compression methods (LZMA, Deflate, PPMd) and provides an extended list of options. Reference website <http://7zsfx.info/>.

### **Akka**

Akka is a toolkit and runtime for building highly concurrent, distributed, and fault tolerant event-driven applications on the JVM.

### **Amazon Ion Java**

Amazon Ion Java is a Java streaming parser/serializer for Ion. It is the reference implementation of the Ion data notation for the Java Platform Standard Edition 8 and above.

### **Amazon SQS Java Messaging Library**

This Amazon SQS Java Messaging Library holds the Java Message Service compatible classes, that are used for communicating with Amazon Simple Queue Service.

### **Animal Sniffer Annotations**

Animal Sniffer Annotations provides Java 1.5+ annotations which allow marking methods which Animal Sniffer should ignore signature violations of.

### **ANTLR**

ANTLR is a powerful parser generator that you can use to read, process, execute, or translate structured text or binary files.

### **Apache ActiveMQ**

Apache ActiveMQ is the most popular and powerful open source messaging and Integration Patterns server.

### **Apache Ant**

Apache Ant is a Java library and command-line tool whose mission is to drive processes described in build files as targets and extension points dependent upon each other. The main known usage of Ant is the build of Java applications. Ant supplies a number of built-in tasks allowing to compile, assemble, test and run Java applications. Ant can also be used effectively to build non Java applications, for instance C or C++ applications. More generally, Ant can be used to pilot any type of process which can be described in terms of targets and tasks.

### **Apache Commons BeanUtils**

The Java language provides *Reflection* and *Introspection* APIs (see the `java.lang.reflect` and `java.beans` packages in the JDK Javadocs). However, these APIs can be quite complex to understand and utilize. The *BeanUtils* component provides easy-to-use wrappers around these capabilities.

### **Apache Commons Codec**

Apache Commons Codec (TM) software provides implementations of common encoders and decoders such as Base64, Hex, Phonetic and URLs.

### **Apache Commons Collections**

The Java Collections Framework was a major addition in JDK 1.2. It added many powerful data structures that accelerate development of most significant Java applications. Since that time it has become the recognized standard for collection handling in Java.

### **Apache Commons Compress**

The Apache Commons Compress library defines an API for working with ar, cpio, Unix dump, tar, zip, gzip, XZ, Pack200, bzip2, 7z, arj, lzma, snappy, DEFLATE, lz4 and Z files.

### **Apache Commons Configuration**

The Commons Configuration software library provides a generic configuration interface which enables a Java application to read configuration data from a variety of sources. Commons Configuration provides typed access to single, and multi-valued configuration parameters.

### **Apache Commons DBCP (Database Connection Pools)**

Many Apache projects support interaction with a relational database. Creating a new connection for each user can be time consuming (often requiring multiple seconds of clock time), in order to perform a database transaction that might take milliseconds. Opening a connection per user can be unfeasible in a publicly-hosted Internet application where the number of simultaneous users can be very large. Accordingly, developers often wish to share a "pool" of open connections between all of the application's current users. The number of users actually performing a request at any given time is usually a very small percentage of the total number of active users, and during request processing is the only time that a database connection is required. The application itself logs into the DBMS, and handles any user account issues internally. There are several Database Connection Pools already available, both within Apache products and elsewhere. This Commons package provides an opportunity to coordinate the efforts required to create and maintain an efficient, feature-rich package under the ASF license.

### **Apache Commons FileUpload**

The Commons **FileUpload** package makes it easy to add robust, high-performance, file upload capability to your servlets and web applications.

### **Apache Commons HttpClient**

HttpClient was started in 2001 as a subproject of the Jakarta Commons, based on code developed by the Jakarta Slide project.

### **Apache Commons IO**

Commons IO is a library of utilities to assist with developing IO functionality.

### **Apache Commons JEXL (Java EXpression Language)**

JEXL is a library intended to facilitate the implementation of dynamic and scripting features in applications and frameworks written in Java.

JEXL implements an Expression Language based on some extensions to the JSTL Expression Language supporting most of the constructs seen in shell-script or ECMAScript. Its goal is to expose scripting features usable by technical operatives or consultants working with enterprise platforms.

### **Apache Commons Lang**

The standard Java libraries fail to provide enough methods for manipulation of its core classes. Apache Commons Lang provides these extra methods.

Lang provides a host of helper utilities for the java.lang API, notably String manipulation methods, basic numerical methods, object reflection, concurrency, creation and serialization and System properties. Additionally it contains basic enhancements to

java.util.Date and a series of utilities dedicated to help with building methods, such as hashCode, toString and equals.

### **Apache Commons Logging**

The Logging package is an ultra-thin bridge between different logging implementations. A library that uses the commons-logging API can be used with any logging implementation at runtime. Commons-logging comes with support for a number of popular logging implementations, and writing adapters for others is a reasonably simple task.

### **Apache Commons Net**

Apache Commons Net™ library implements the client side of many basic Internet protocols. The purpose of the library is to provide fundamental protocol access, not higher-level abstractions.

### **Apache Commons Pool**

Pool provides an Object-pooling API, with three major aspects:

1. A generic object pool interface that clients and implementers can use to provide easily interchangeable pooling implementations.
2. A toolkit for creating modular object pools.
3. Several general purpose pool implementations.

### **Apache FOP**

Apache FOP (Formatting Objects Processor) is a print formatter driven by XSL formatting objects (XSL-FO) and an output independent formatter. It is a Java application that reads a formatting object (FO) tree and renders the resulting pages to a specified output. Output formats currently supported include PDF, PS, PCL, AFP, XML (area tree representation), Print, AWT and PNG, and to a lesser extent, RTF and TXT. The primary output target is PDF.

### **Apache Geronimo**

Apache Geronimo is an open source server runtime that integrates the best open source projects to create Java/OSGi server runtimes that meet the needs of enterprise developers and system administrators.

### **Apache HttpClient**

Although the java.net package provides basic functionality for accessing resources via HTTP, it doesn't provide the full flexibility or functionality needed by many applications. HttpClient seeks to fill this void by providing an efficient, up-to-date, and feature-rich package implementing the client side of the most recent HTTP standards and recommendations.

Designed for extension while providing robust support for the base HTTP protocol, HttpClient may be of interest to anyone building HTTP-aware client applications such as web browsers, web service clients, or systems that leverage or extend the HTTP protocol for distributed communication.

### **Apache HttpComponents**

The Apache HttpComponents™ project is responsible for creating and maintaining a toolset of low level Java components focused on HTTP and associated protocols.

Within the HttpComponents project, [HttpCore](#) is a set of low level HTTP transport components that can be used to build custom client and server side HTTP services with a minimal footprint. HttpCore supports two I/O models: blocking I/O model based on the classic Java I/O and non-blocking, event driven I/O model based on Java NIO

### **Apache Log4j**

Apache Log4j 2 is an upgrade to Log4j that provides significant improvements over its predecessor, Log4j 1.x, and provides many of the improvements available in Logback while fixing some inherent problems in Logback's architecture.

### **Apache Lucene, SOLR**

The Apache Lucene™ project develops open-source search software.

### **Apache Tomcat, Tomcat Embed**

Apache Tomcat is an open source software implementation of the Java Servlet and JavaServer Pages technologies.

### **Apache XBean :: Spring**

XBean :: Spring provides a schema-driven proprietary namespace handler for Spring contexts.

### **Apache Xerces**

The Apache Xerces Project is responsible for software licensed to the Apache Software Foundation intended for the creation and maintenance of:

- XML parsers
- related software components

### **Apache XML**

The Apache XML Project used to be the home for many XML-related subprojects, many of which have moved to top-level project status recently or are currently in migration. The Apache XML Project slowly transforms into an place where you can find pointers to XML-related projects here in The Apache Foundation.

### **Apache XML Commons External Components**

The External Components portion of xml-commons contains interfaces that are defined by external standards organizations.

### **ASM**

ASM is an all purpose Java bytecode manipulation and analysis framework. It can be used to modify existing classes or dynamically generate classes, directly in binary form. Provided common transformations and analysis algorithms allow to easily assemble custom complex transformations and code analysis tools.

### **Aspectj**

Aspectj is a seamless aspect-oriented extension to the Java programming language. It is Java platform compatible easy to learn and use.

### **AWS SDK for Amazon SQS**

The AWS Java SDK for Amazon SQS module holds the client classes that are used for communicating with Amazon Simple Queue Service.

### **AWS SDK for Java Core**

The AWS SDK for Java - Core module holds the classes that are used by the individual service clients to interact with Amazon Web Services. Users need to depend on aws-java-sdk artifact for accessing individual client classes.

### **Byte Buddy**

Byte Buddy is a code generation and manipulation library for creating and modifying Java classes during the runtime of a Java application and without the help of a compiler.

### **CDI APIs**

APIs for CDI (Contexts and Dependency Injection for Java).

### **cglib**

cglib is a powerful, high performance and quality Code Generation Library, It is used to extend JAVA classes and implements interfaces at runtime.

### **Checker Qual**

Checker Qual is the set of annotations (qualifiers) and supporting classes used by the Checker Framework to type check Java source code.

### **ClassMate**

ClassMate is a library for introspecting generic type information of types, member/static methods, fields. Especially useful for POJO/Bean introspection.

### **Config (Typesafe)**

A configuration library for JVM languages.

### **DITA-OT**

The DITA Open Toolkit is a Java-based implementation of the OASIS DITA Technical Committee's specification for DITA DTDs and schemas. It contains ANT, SAXON,...

### **DockPanel Suite**

.Net Docking Library for Windows Forms

### **dom4j**

*dom4j* is an easy to use, open source library for working with XML, XPath and XSLT on the Java platform using the Java Collections Framework and with full support for DOM, SAX and JAXP.

### **dsinfo**

The dsinfo library enables you to easily use Scala-side information in implementations of embedded (internal) domain-specific languages. dsinfo is implemented using Scala macros which are an experimental feature of Scala 2.10 and 2.11.

### **dsprofile**

The dsprofile library provides general facilities to implement domain-specific profiling in Scala and Java programs.

### **edtFTPj/Free**

Free Java FTP library gives Java developers extensive FTP functionality.

### **Ehcache**

Ehcache is an open source, standards-based cache for boosting performance, offloading your database, and simplifying scalability. It's the most widely-used Java-based cache because it's robust, proven, and full-featured. Ehcache scales from in-process, with one or more nodes, all the way to mixed in-process/out-of-process configurations with terabyte-sized caches.

### **Elasticsearch RESTful client**

A RESTful client for the Elasticsearch search engine.

### **Error Prone**

Error Prone is a static analysis tool for Java that catches common programming mistakes at compile-time.



### **Fast Serialization**

Fast Serialization reimplements Java Serialization with focus on speed (up to 10 times faster), size and compatibility. This allows the use of FST with minimal code change.

### **FastInfoSet**

Fast Infoset (or FI) is an international standard that specifies a binary encoding format for the XML Information Set (XML Infoset) as an alternative to the XML document format. It aims to provide more efficient serialization than the text-based XML format.

### **Fizzler**

Fizzler is a W3C Selectors parser and generic selector framework for document hierarchies.

### **Font Awesome**

Font Awesome gives you scalable vector icons that can instantly be customized - size, color, drop shadow, and anything that can be done with the power of CSS.

### **Fonto Editor**

Fonto is an online XML editor designed for people with no knowledge of XML or any other technology that comes with structured content authoring.

### **GeckoFX**

Gecko is a free and open source layout engine used in many applications developed by the Mozilla Foundation and the Mozilla Corporation (notably the Firefox web browser).

### **globalize**

JavaScript globalization and localization. Formats and parses strings, dates and numbers in over 350 cultures.

### **GNU Aspell**

GNU Aspell is a Free and Open Source spell checker designed to eventually replace Ispell. It can either be used as a library or as an independent spell checker. Its main feature is that it does a superior job of suggesting possible replacements for a misspelled word than just about any other spell checker out there for the English language. Unlike Ispell, Aspell can also easily check documents in UTF-8 without having to use a special dictionary. Aspell will also do its best to respect the current locale setting. Other advantages over Ispell include support for using multiple dictionaries at once and intelligently handling personal dictionaries when more than one Aspell process is open at once.

Specifically we are using GNUASpell dictionaries for de-CH, de-DE, en-CA, en-GB, en-US, es-ES, fr-FR, fr-CH, nl-NL.

### **google-code-prettify**

google-code-prettify is a Javascript module and CSS file that allows syntax highlighting in an html page.

### **google-gson**

google-gson is a Java library to convert JSON to Java objects and vice-versa.

### **Google Guava**

The Guava project contains several of Google's core libraries that we rely on in our Java-based projects: collections, caching, primitives support, concurrency libraries, common annotations, string processing, I/O, and so forth.

### **Google J2ObjC**

J2ObjC is an open-source command-line tool from Google that translates Java source code to Objective-C for the iOS (iPhone/iPad) platform. This tool enables Java source to be part of an iOS application's build, as no editing of the generated files is necessary.

### **GraphQL-Java**

The Java implementation of GraphQL.

### **HdrHistogram**

A High Dynamic Range Histogram that supports recording and analyzing sampled data value counts across a configurable integer value range with configurable value precision within the range. Value precision is expressed as the number of significant digits in the value recording, and provides control over value quantization behavior across the value range and the subsequent value resolution at any given level.

### **Hibernate**

Hibernate is a high-performance Object/Relational persistence and query service. The most flexible and powerful Object/Relational solution on the market, Hibernate takes care of the mapping from Java classes to database tables and from Java data types to SQL data types. It provides data query and retrieval facilities that significantly reduce development time. Hibernate's design goal is to relieve the developer from 95% of common data persistence-related programming tasks by eliminating the need for manual, hand-crafted data processing using SQL and JDBC.

### **HK2 Framework**

HK2 is a light-weight and dynamic dependency injection framework.

### **HSQLDB (HyperSQL DataBase)**

HSQLDB (HyperSQL DataBase) is the leading SQL relational database engine written in Java. It offers a small, fast multithreaded and transactional database engine with in-memory and disk-based tables and supports embedded and server modes. It includes a powerful command line SQL tool and simple GUI query tools.

### **Hunspell**

Hunspell is the spell checker of LibreOffice, OpenOffice.org, Mozilla Firefox 3 & Thunderbird, Google Chrome, and it is also used by proprietary software packages, like Mac OS X, InDesign, MemoQ, Opera and Trados Studio.

### **InstallAnywhere**

InstallAnywhere is the leading multi-platform development solution for application producers who need to deliver a professional and consistent cross installation experience for physical, virtual and cloud environments. From a single project file and build environment, InstallAnywhere creates reliable installations for on-premises platforms - Windows, Linux, Apple OS X, Solaris, AIX, HP-UX, and IBM iSeries - and enables you to take existing and new software products to a virtual and cloud infrastructure.

### **Jackson tooling**

Inspired by the quality and variety of XML tooling available for the Java platform (StAX, JAXB, etc.), the Jackson is a multi-purpose Java library for processing JSON data format. Jackson aims to be the best possible combination of fast, correct, lightweight, and ergonomic components for developers.

### **Jakarta Activation API**

The JavaBeans Activation Framework API JAR.

### **Jakarta XML Bind API**

Jakarta's XML bind API.

### **Java API for RESTful web services (javax.ws.rs)**

Java API for RESTful Web Services.

### **JavaBeans Activation Framework**

With the JavaBeans Activation Framework standard extension, developers who use Java technology can take advantage of standard services to determine the type of an arbitrary piece of data, encapsulate access to it, discover the operations available on it, and to instantiate the appropriate bean to perform said operation(s).

### **JavaBeans Validation**

Bean Validation (JSR-303) API.

### **Javassist (*Java Programming Assistant*)**

Javassist (*Java Programming Assistant*) makes Java bytecode manipulation simple. It is a class library for editing bytecodes in Java; it enables Java programs to define a new class at runtime and to modify a class file when the JVM loads it. Unlike other similar bytecode editors, Javassist provides two levels of API: source level and bytecode level. If the users use the source-level API, they can edit a class file without knowledge of the specifications of the Java bytecode. The whole API is designed with only the vocabulary of the Java language. You can even specify inserted bytecode in the form of source text; Javassist compiles it on the fly. On the other hand, the bytecode-level API allows the users to directly edit a class file as other editors.

### **javax.annotation**

JSR 250 Common Annotations For The Java Platform.

### **javax.cache**

Caching Java API

### **javax.Expression Language**

Expression Language Java API

### **javax.inject**

Dependency Injection Java API

### **javax.validation**

Bean Validation API

### **javax.jms**

The Java Message Service (JMS) API is a messaging standard that allows application components based on the Java 2 Platform, Enterprise Edition (J2EE) to create, send, receive, and read messages. It enables distributed communication that is loosely coupled, reliable, and asynchronous.

### **JAXB**

The goal of the JAXB project is to develop and evolve the code base for the Reference Implementation (RI) of JAXB, the Java Architecture for XML Binding. The JAXB specification is developed through the Java Community Process following the process described at [jcp.org](http://jcp.org). This process involves an Expert Group with a lead that is responsible for delivering the specification, a reference implementation (RI) and a Technology Compatibility Kit (TCK). The primary goal of an RI is to support the development of the specification and to

validate it. Specific RIs can have additional goals; the JAXB RI is a production-quality implementation that is used directly in a number of products by Oracle and other vendors.

### **JBoss Java Annotation Indexer (Jandex)**

A Java Annotation Indexer for JBoss

### **JBoss Logging Framework**

The JBoss Logging Framework.

### **jedis**

A blazingly small and sane Redis Java client.

### **Jersey RESTful WS**

Developing RESTful Web services that seamlessly support exposing your data in a variety of representation media types and abstract away the low-level details of the client-server communication is not an easy task without a good toolkit. In order to simplify development of RESTful Web services and their clients in Java, a standard and portable JAX-RS API has been designed. Jersey RESTful Web Services framework is open source, production quality, framework for developing RESTful Web Services in Java that provides support for JAX-RS APIs and serves as a JAX-RS (JSR 311 & JSR 339) Reference Implementation.

### **Jettison**

Jettison is a collection of Java APIs (like STaX and DOM) which read and write JSON. This allows nearly transparent enablement of JSON based web services in services frameworks like CXF or XML serialization frameworks like XStream.

### **Jetty**

The Jetty Web Server provides an HTTP server and Servlet container capable of serving static and dynamic content either from a standalone or embedded instantiations. Starting from Jetty version 7, the Jetty webserver and other core components are hosted by the Eclipse Foundation.

### **JLine**

JLine is a Java library for handling console input. It is similar in functionality to BSD editline and GNU readline. People familiar with the readline/editline capabilities for modern shells (such as bash and tcsh) will find most of the command editing features of JLine to be familiar.

### **JMESPath Java**

JMESPath is a query language for JSON. You can extract and transform elements from a JSON document. This is a Java implementation

### **Joda-Convert**

Joda-Convert provides a small set of classes to provide round-trip conversion between Objects and Strings. It does not tackle the wider problem of Object to Object transformation.

### **Joda-Time**

Joda-Time provides a quality replacement for the Java *date* and *time* classes. The design allows for multiple *calendar* systems, while still providing a simple API. The 'default' calendar is the [http://www.joda.org/joda-time/cal\\_iso.html](http://www.joda.org/joda-time/cal_iso.html) standard which is used by XML. The Gregorian, Julian, Buddhist, Coptic, Ethiopic and Islamic systems are also included, and we welcome further additions. Supporting classes include time zone, duration, format and parsing.

### **JOL (Java Object Layout)**

JOL (Java Object Layout) is the tiny toolbox to analyze object layout schemes in JVMs. These tools are using Unsafe, JVMTI, and Serviceability Agent (SA) heavily to decoder the *actual* object layout, footprint, and references.

### **jQuery**

jQuery is a fast, small, and feature-rich JavaScript library. It makes things like HTML document traversal and manipulation, event handling, animation, and Ajax much simpler with an easy-to-use API that works across a multitude of browsers. With a combination of versatility and extensibility, jQuery has changed the way that millions of people write JavaScript.

### **jQuery CheckBoxTree**

A jQuery based checkbox tree plugin that displays your hierarchical data in a tree structure with checkboxes.

### **jquery-cookie**

jQuery plugin for reading, writing and deleting cookies.

### **jquery.datatables**

DataTables is a plug-in for the jQuery Javascript library. It is a highly flexible tool, based upon the foundations of progressive enhancement, which will add advanced interaction controls to any HTML table.

### **jquery.dataTables.columnFilter**

Adds advanced filter capabilities to the DataTables. JS file.

### **jQueryFileUpload**

File Upload widget with multiple file selection, drag&drop support, progress bar, validation and preview images, audio and video for jQuery.

### **jquery.TypeScript.DefinitelyTyped**

TypeScript Definitions (d.ts) for jquery.

### **jQuery.Gantt**

Draw Gantt charts with the famous jQuery ease of development.

### **jQuery Highlight**

Highlights the search keywords/terms in a preview.

### **jQuery UI**

jQuery UI is a set of user interface interactions, effects, widgets, and themes built on top of the jQuery JavaScript Library.

### **JSON-js**

JSON is a light-weight, language independent, data interchange format. See <http://www.JSON.org> / The files in this collection implement JSON encoders/decoders in JavaScript. JSON became a built-in feature of JavaScript when the ECMAScript Programming Language Standard - Fifth Edition was adopted by the ECMA General Assembly in December 2009. Most of the files in this collection are for applications that are expected to run in obsolete web browsers. For most purposes, json2.js is the best choice.

### **Json.NET**

Json.NET is a popular high-performance JSON framework for .NET.

### [jsoup](#)

jsoup is a Java library for working with real-world HTML. It provides a very convenient API for extracting and manipulating data, using the best of DOM, CSS, and jquery-like methods.

### [JTA \(Java Transaction API\)](#)

The `javax.transaction` package. It is appropriate for inclusion in a classpath, and may be added to a Java 2 installation.

### [Kiama](#)

The Kiama test library contains a collection of examples, tests that use those examples, and useful test support code.

### [Knockout JavaScript library](#)

Knockout is a JavaScript library that helps you to create rich, responsive display and editor user interfaces with a clean underlying data model. Any time you have sections of UI that update dynamically (e.g., changing depending on the user's actions or when an external data source changes), KO can help you implement it more simply and maintainably.

### [Kryo](#)

Kryo is a fast and efficient binary object graph serialization framework for Java. The goals of the project are high speed, low size, and an easy to use API. The project is useful any time objects need to be persisted, whether to a file, database, or over the network.

Kryo can also perform automatic deep and shallow copying/cloning. This is direct copying from object to object, not object to bytes to object.

### [kXML 2](#)

kXML is a small XML pull parser, specially designed for constrained environments such as Applets, Personal Java or MIDP devices. In contrast to kXML 1, kXML 2 is based on the XML pull API.

### [LatencyUtils](#)

The LatencyUtils package includes useful utilities for tracking latencies. Especially in common in-process recording scenarios, which can exhibit significant coordinated omission sensitivity without proper handling.

### [Logback](#)

Logback is intended as a successor to the popular log4j project, picking up where log4j leaves off.

### [MapStruct](#)

MapStruct is a code generator that greatly simplifies the implementation of mappings between Java bean types based on a convention over configuration approach. The generated mapping code uses plain method invocations and thus is fast, type-safe and easy to understand.

### [MathJAX](#)

MathJax is an open-source JavaScript display engine for LaTeX, MathML, and AsciiMath notation that works in all modern browsers. It was designed with the goal of consolidating the recent advances in web technologies into a single, definitive, math-on-the-web platform supporting the major browsers and operating systems.

### **Micrometer**

Micrometer provides a simple facade over the instrumentation clients for the most popular monitoring systems, allowing you to instrument your JVM-based application code without vendor lock-in. Think SLF4J, but for metrics.

### **Microsoft JDBC Driver for SQL Server**

Microsoft provides a Java Database Connectivity (JDBC) driver for use with SQL Server, and Azure SQL Database. The driver provides Java database connectivity from any Java application, application server, or Java-enabled applet. This driver is a Type 4 JDBC driver that provides database connectivity through the standard JDBC application program interfaces (APIs).

### **Minlog**

MinLog is a tiny Java logging library.

### **MXP1**

MXP1 is a stable XmlPull parsing engine that is based on ideas from XPP and in particular XPP2 but completely revised and rewritten to take the best advantage of latest JIT JVMs such as Hotspot in JDK 1.4+.

### **NHunspell**

NHunspell brings the spell checking, hyphenation and thesaurus to the Microsoft® .NET Framework. NHunspell is C# library and wraps native libraries for Hunspell, Hyphen and MyThes. One design goal of this library and wrapper is to keep the source code of the included libraries as unmodified as possible. New versions of the base libraries can therefore easily adopted to NHunspell.

The integrated libraries are used in OpenOffice and they work with the dictionaries published on OpenOffice.org.

### **NLog**

NLog is a free logging platform for .NET, Silverlight and Windows Phone with rich log routing and management capabilities. NLog makes it easy to produce and manage high-quality logs for your application regardless of its size or complexity.

### **Objenesis**

Objenesis is a small Java library that serves one purpose: to instantiate a new object of a particular class.

### **okhttp**

An HTTP+HTTP/2 client for Android and Java applications.

### **okio**

A modern I/O API for Java.

### **Oracle JDBC Drivers**

Drivers used for making a JDBC connection from Java to an Oracle database.

### **Oracle PKI (Public Key Infrastructure)**

Oracle public key infrastructure (PKI) is used by Oracle Enterprise Security Manager, LDAP-enabled Oracle Enterprise Manager, Oracle's Secure Socket Layer (SSL) authentication, Oracle Database, and Oracle Application Server.

### **Oracle Security Developer Tools (OSDT)**

Oracle Security Developer Tools provide you with the cryptographic building blocks necessary for developing robust security applications, ranging from basic tasks like secure messaging to more complex projects such as securely implementing a service-oriented architecture. The tools build upon the core foundations of cryptography, public key infrastructure, web services security, and federated identity management.

### **PATRICIA Trie in Java**

An implementation of the Practical Algorithm to Retrieve Information Coded in Alphanumeric (PATRICIA).

### **Postal.Mvc5**

Generate emails using ASP.NET MVC views

### **Project Reactor**

Reactor is a fourth-generation Reactive library for building non-blocking applications on the JVM based on the Reactive Streams Specification.

### **PS Cmdlet Help Editor**

PowerShell Cmdlet Help Editor is the tool that helps you to create and edit XML-based help files for your PowerShell modules and PSSnap-Ins.

### **ReactJS**

React is a JavaScript library for building user interfaces.

### **Reactive Streams**

A Protocol for Asynchronous Non-Blocking Data Sequence

### **Reactor Core**

Reactor Core is a non-blocking reactive foundation for the JVM.

### **Red Hat Linux**

Red Hat Enterprise Linux OpenStack Platform delivers an integrated foundation to create, deploy, and scale a secure and reliable public or private OpenStack cloud. Red Hat Enterprise Linux OpenStack Platform combines the world's leading enterprise Linux and the fastest-growing cloud infrastructure platform to give you the agility to scale and quickly meet customer demands without compromising on availability, security, or performance.

### **ReflectASM**

ReflectASM is a very small Java library that provides high performance reflection by using code generation. An access class is generated to set/get fields, call methods, or create a new instance. The access class uses bytecode rather than Java's reflection, so it is much faster. It can also access primitive fields via bytecode to avoid boxing.

### **Rx .NET**

Reactive Extensions for .NET library used to validate entered values

### **Scala**

The Scala programming language fuses object-oriented and functional programming in a statically typed programming language. It is aimed at the construction of components and component systems.



### [Scallop](#)

Scallop is a command line parser.

### [SitemapGen4j](#)

SitemapGen4j is a library to generate XML sitemaps in Java.

### [SLF4J](#)

The Simple Logging Facade for Java (SLF4J) serves as a simple facade or abstraction for various logging frameworks (e.g. java.util.logging, logback, log4j) allowing the end user to plug in the desired logging framework at deployment time.

### [SnakeYAML](#)

YAML is a data serialization format designed for human readability and interaction with scripting languages. SnakeYAML is a YAML parser and emitter for the Java programming language.

### [SNMP4J](#)

SNMP4J is an enterprise class free open source and state-of-the-art SNMP implementation for Java™ 2SE 1.4 or later. SNMP4J supports command generation (managers) as well as command responding (agents). Its clean object oriented design is inspired by SNMP++, which is a well-known SNMPv1/v2c/v3 API for C++.

### [SpringFox](#)

Automated JSON API documentation for API's built with Spring.

### [Spring Framework](#)

The Spring Framework provides a comprehensive programming and configuration model for modern Java-based enterprise applications - on any kind of deployment platform. A key element of Spring is infrastructural support at the application level: Spring focuses on the "plumbing" of enterprise applications so that teams can focus on application-level business logic, without unnecessary ties to specific deployment environments.

### [StAX](#)

StAX is a standard XML processing API that allows you to stream XML data from and to your application. This StAX implementation is the standard pull parser implementation for JSR-173 specification.

### [SVG.NET](#)

Public fork of the C# SVG rendering library. This started out as a minor modification to enable the writing of proper SVG strings. But now after almost two years we have so many fixes and improvements that we decided to share our current codebase to the public in order to improve it even further.

### [Swagger](#)

Swagger is a simple yet powerful representation of your RESTful API. With the largest ecosystem of API tooling on the planet, thousands of developers are supporting Swagger in almost every modern programming language and deployment environment. With a Swagger-enabled API, you get interactive documentation, client SDK generation and discoverability.

### [Swashbuckle.Core](#)

Seamlessly adds a Swagger to WebApi projects.

### **Thinkecture IdentityModel**

Helpers and client libraries for OpenID Connect, OAuth 2.0 and claims-based Identity.

### **Thinkecture IdentityServer**

Front-end Secure Token Service to serve SAML tokens.

### **TwelveMonkeys Common**

TwelveMonkeys Common library contains common utility classes relating to languages, I/O and images.

### **TwelveMonkeys ImageIO**

TwelveMonkeys ImageIO is a collection of plugins and extensions for Java's ImageIO. These plugins extends the number of image file formats supported in Java, using the `javax.imageio.*` package. The main purpose of this project is to provide support for formats not covered by the JRE itself.

### **TXW2**

TXW is a library that allows you to write XML documents.

### **ua-parser**

A multi-language port of Browserscope's user agent parser.

### **WebGrease**

Web Grease is a suite of tools for optimizing javascript, css files and images.

### **WiX**

The WiX toolset builds Windows installation packages from XML source code. The tool-set integrates seamlessly into build processes.

### **Woodstox**

Woodstox is a high-performance validating namespace-aware StAX-compliant (JSR-173) Open Source XML-processor written in Java.

### **Xalan-Java**

Xalan-Java is an XSLT processor for transforming XML documents into HTML, text, or other XML document types. It implements XSL Transformations (XSLT) Version 1.0 and XML Path Language (XPath) Version 1.0 and can be used from the command line, in an applet or a servlet, or as a module in other program.

### **Xerces Java Parser**

The Xerces Java Parser 1.4.4 supports the XML 1.0 recommendation and contains advanced parser functionality, such as support for the W3C's XML Schema recommendation version 1.0, DOM Level 2 version 1.0, and SAX Version 2, in addition to supporting the industry-standard DOM Level 1 and SAX version 1 APIs.

### **XML Pull Parsing**

An XML Pull Parsing API.

### **XStream**

XStream is a simple library to serialize objects to XML and back again.

### **XULRunner**

XULRunner is a runtime environment developed by the Mozilla Foundation to provide a common back-end for previewing.