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# MarkLogic Server

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## Installation Guide for All Platforms

MarkLogic 9  
May, 2017

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## Table of Contents

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### Installation Guide for All Platforms

|       |  |    |
|-------|--|----|
| 1.0   | Requirements and Database Compatibility .....                                    | 3  |
| 1.1   | Introduction .....   | 3  |
| 1.2   | MarkLogic Server Assumptions .....   | 4  |
| 1.3   | Memory, Disk Space, and Swap Space Requirements .....                            | 4  |
| 1.4   | Supported Platforms .....  | 5  |
| 1.5   | Supported Filesystems .....  | 6  |
| 1.6   | Upgrades and Database Compatibility .....  | 6  |
| 1.6.1 | Prerequisites for Application Services Portion of the Upgrade .....              | 7  |
| 1.6.2 | MarkLogic 9 Databases are Compatible With MarkLogic 7 and<br>MarkLogic 8 8       |    |
| 2.0   | Procedures .....   | 9  |
| 2.1   | Upgrading from Previous Releases .....   | 9  |
| 2.1.1 | Note That Reindexing is On By Default .....                                      | 9  |
| 2.1.2 | Upgrading from Release 9.0-1 or Later .....                                      | 10 |
| 2.1.3 | Upgrading from MarkLogic 7 or MarkLogic 8 .....                                  | 11 |
| 2.1.4 | Upgrading from Release 6.0 or earlier .....                                      | 12 |
| 2.2   | Installing MarkLogic Server .....  | 12 |
| 2.3   | Starting MarkLogic Server .....  | 15 |
| 2.4   | Configuring the First and Subsequent Hosts .....                                 | 15 |
| 2.4.1 | Configuring a Single Host or the First Host in a Cluster .....                   | 16 |
| 2.4.2 | Configuring an Additional Host in a Cluster .....                                | 17 |
| 2.4.3 | Leaving a Cluster and Becoming a Single Host .....                               | 20 |
| 2.5   | Entering a License Key .....   | 21 |
| 2.6   | Checking for the Correct Software Version .....                                  | 21 |
| 2.7   | Configuring MarkLogic Server on UNIX Systems to Run as a Non-daemon User .<br>22 |    |
| 2.8   | Removing MarkLogic Server .....  | 25 |
| 3.0   | Copyright .....  | 27 |
| 3.0   | COPYRIGHT .....  | 27 |
| 4.0   | Technical Support .....  | 28 |

## 1.0 Requirements and Database Compatibility

This chapter introduces MarkLogic Server, lists the product requirements and supported platforms, and describes the database compatibility with previous releases. It includes the following sections:

- [Introduction](#)
- [MarkLogic Server Assumptions](#)
- [Memory, Disk Space, and Swap Space Requirements](#)
- [Supported Platforms](#)
- [Supported Filesystems](#)
- [Upgrades and Database Compatibility](#)

### 1.1 Introduction

MarkLogic Server is a powerful NoSQL database for harnessing your digital content base, complete with Enterprise features demanded by real world, mission-critical applications. MarkLogic enables you to build complex applications that interact with large volumes of content in JSON, XML, SGML, HTML, and other popular content formats, as well as binary formats. The unique architecture of MarkLogic ensures that your applications are both scalable and high-performance, delivering query results at search-engine speeds while providing transactional integrity over the underlying content repository. MarkLogic can be configured for a distributed environment, enabling you to scale your infrastructure through hardware expansion.

This installation guide explains the procedures needed to install MarkLogic on your system. It is intended for a technical audience, specifically an IT staff with experience in JSON and XML. This document only explains how to install the software, not how to use the software. To learn how to get started using the software, see the rest of the MarkLogic documentation (available on [docs.marklogic.com](http://docs.marklogic.com)), including the following documents:

- *Getting Started With MarkLogic Server*
- *MarkLogic Server Release Notes*
- *MarkLogic Server Concepts Guide*
- *MarkLogic Server Administrator's Guide*
- *MarkLogic Server Application Developer's Guide*
- *MarkLogic Server Search Developer's Guide*
- *JavaScript Reference Guide*
- *MarkLogic XQuery and XSLT Function Reference*

## 1.2 MarkLogic Server Assumptions

When MarkLogic installs, it sets memory and other settings based on the size of the computer in which it is running. MarkLogic is a scalable, multi-threaded server product, and as such it assumes it has the entire machine available to it, including the cpu and disk I/O capacity. It is important to follow the guidelines set up in this chapter. Furthermore, MarkLogic assumes there is only one MarkLogic Server process running on any given machine, so it is not recommended to run multiple instances of MarkLogic on a single machine.

## 1.3 Memory, Disk Space, and Swap Space Requirements

Before installing the software, be sure that your system meets the following requirements:

- 2 GB of system memory, minimum. 4 GB or more recommended, depending on database size.

The first time it runs, MarkLogic Server automatically configures itself to the amount of memory on the system, reserving as much as it can for its own use. If you need to change the default configuration, you can manually override these defaults at a later time using the Admin Interface.

- 1.5 times the disk space of the total forest size. Specifically, each forest on a filesystem requires its filesystem to have at least 1.5 times the forest size in disk space (or, for each forest less than 48 GB, 3 times the forest size) when the `merge max size` database merge setting is set to the default of 48 GB. This translates to approximately 1.5 times the disk space of the source content after it is loaded. \*

For example, if you plan on loading content that will result in a 200 GB database, reserve at least 300 GB of disk space. The disk space reserve is required for merges.

- System temp space sizing - when using telemetry allow for 20 GB maximum in system temp space, although normal usage will likely be less than 100 MB.
- On Linux systems, swap space equal to the amount of physical memory on the machine or 32 GB, whichever is lower. MarkLogic also recommends setting Linux Huge Pages on Red Hat Enterprise Linux 7 systems to 3/8 the size of your physical memory. For details on setting up Huge Pages, see <https://access.redhat.com/solutions/46111>.

If you have Huge Pages set up on a Linux system, your swap space on that machine should be equal to the size of your physical memory minus the size of your Huge Page (because Linux Huge Pages are not swapped), or 32 GB, whichever is lower. For example, if you have 48 GB of physical memory, and if you have Huge Pages set to 18 GB, then you need swap space of 30 GB (48 - 18).

At system startup on Linux machines, MarkLogic Server logs a message to the `ErrorLog.txt` file showing the Huge Page size, and the message indicates if the size is below the recommended level.

If you are using Red Hat Enterprise Linux 7, you must turn off Transparent Huge Pages (Transparent Huge Pages are configured automatically by the operating system).

- On Windows systems twice the physical memory is also recommended for the swap (page) file. You configure this in the System Control Panel > Advanced system settings > Performance Settings > Advanced tab. Set the Virtual memory settings on that tab to twice your physical memory.

\* You need at least 2 times the `merge_max_size` of free space per forest, regardless of the forest size. Therefore, with the default `merge_max_size` of 48 GB, you need at least 96 GB of free space. Additionally, if your journals are not yet created, you need 2 times the journal size of free disk space (if the journal space is not yet allocated). Therefore, to be safe, you need (with the default `merge_max_size` and a 2 GB journal size) at least 100 GB of free space for each forest, no matter what size the forest is.

## 1.4 Supported Platforms

MarkLogic Server is supported on the following platforms:

- Microsoft Windows Server 2012 (x64), Windows 7 and Windows 10 64-bit (x64)\*
- Red Hat Enterprise Linux 7 (x64)\*\* \*\*\* \*\*\*\*
- CentOS 7 (x64)\*\* \*\*\* \*\*\*\*
- Amazon Linux (x64)\*\* \*\*\*
- Mac OS X 10.11\*\*\*\*\*

\* Microsoft Windows 7 and Windows 10 are supported for development only.

If MarkLogic Server fails to start up on Windows with the error “the application failed to initialize properly (0xc0150002)”, then a dependency is missing from your environment and you need to download and install the following DLL for 64-bit versions of Windows:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=eb4ebe2d-33c0-4a47-9dd4-b9a6d7bd44da&DisplayLang=en>. Additionally, if you get an error on startup saying you need MSVCR100.dll, then install the Microsoft Visual C++ 2010 SP1 Redistributable Package (x64) <http://www.microsoft.com/en-us/download/details.aspx?id=13523>.

\*\* Either `deadline` or `noop` I/O scheduler is required to ensure efficient disk I/O for MarkLogic Server on Linux. You should not use `noop` unless your MarkLogic host has intelligent I/O controllers or is only connected to SSDs. For more details, see <http://help.marklogic.com/Knowledgebase/Article/View/8/0/notes-on-io-schedulers>.

\*\*\*The `redhat-lsb-core`, `glibc`, `gdb`, and `cyrus-sasl-lib` packages are required on Red Hat Enterprise Linux. Additionally, on 64-bit Red Hat Enterprise Linux, both the 32-bit and the 64-bit `glibc` packages are required.

\*\*\*\*Red Hat Enterprise Linux 7 (x64) is also supported in a VMWare ESXi 6.0 (installed on bare metal) environment.

\*\*\*\*\*Mac OS X is supported for development only. Conversion (Office and PDF) and entity enrichment are not available on Mac OS X. Mac OS X 10.8 or 10.11 (Mountain Lion through El Capitan) on a 64-bit capable processor is required (<http://support.apple.com/kb/HT3696>).

**Note:** Red Hat Enterprise Linux 6 is not supported for MarkLogic 9.

## 1.5 Supported Filesystems

MarkLogic relies on the operating system for filesystem operations. While any filesystem that works properly (including under heavy load) should work, the following table lists the operating systems along with the filesystems under which they are supported. Other filesystems may work but have not been thoroughly tested by MarkLogic.

| Operating System      | Supported Filesystems   |
|-----------------------|---|
| Linux (all varieties) | <p>XFS (recommended), EXT3, and EXT4 as well as the clustered filesystems for shared-disk failover mentioned in <a href="#">Requirements for Shared-Disk Failover</a> in the <i>Scalability, Availability, and Failover Guide</i>.</p> <p><b>Warning</b> Do not use <code>data=writeback</code> with EXT3 and EXT4 filesystems.</p> <p>NAS is supported on Red Hat Enterprise Linux 7 and NetAPP.</p> |
| Windows               | NTFS  |
| Mac OS                | HFS+  |
| All                   | Hadoop HDFS, Amazon S3 (no journaling with S3)  |

Additionally, HDFS storage is supported with MarkLogic on the HDFS platforms described in [HDFS Storage](#) in the *Query Performance and Tuning Guide*.

**Note:** The Solaris OS is not certified for MarkLogic 9.

## 1.6 Upgrades and Database Compatibility

MarkLogic 9 supports upgrades from MarkLogic 7 or from MarkLogic 8 or later databases. If you are upgrading from an earlier version of MarkLogic Server, you must first upgrade to 7 or 8 before moving to MarkLogic 9. For the procedure for upgrading, see “Upgrading from Previous Releases” on page 9.

During the upgrade, the Security database, the Schemas database, and the configuration files are automatically upgraded. The Security database is upgraded with the latest execute privileges and the Schemas database is upgraded with the latest version of the Schemas used by MarkLogic Server. The upgrade occurs as part of the installation procedure.

Databases that contain your own content are also upgraded to work with MarkLogic 9; once you upgrade to MarkLogic 9, you will no longer be able to use that database with previous versions of MarkLogic.

**Note:** MarkLogic Corporation strongly recommends performing a backup of your databases before upgrading to MarkLogic 9. Additionally, MarkLogic Corporation recommends that you first upgrade to the latest maintenance release of the major version of MarkLogic you are running before upgrading to MarkLogic 9.

For the procedure for upgrading to MarkLogic 9, see “Upgrading from Previous Releases” on page 9. For details about known incompatibilities between MarkLogic 7 or MarkLogic 8 and MarkLogic 9, see [Known Incompatibilities with Previous Releases](#) in the *Release Notes*.

This section contains database compatibility information between various releases, and includes the following sections.

- [Prerequisites for Application Services Portion of the Upgrade](#)
- [MarkLogic 9 Databases are Compatible With MarkLogic 7 and MarkLogic 8](#)

### 1.6.1 Prerequisites for Application Services Portion of the Upgrade

When upgrading from releases prior to MarkLogic 7 to MarkLogic 9, the upgrade reconfigures the Docs and App Services App Servers, which by default are on port 8000 and port 8002 in older releases. In order for those App Servers to be upgraded, the following conditions must be met:

- Either no App Server is running on port 8000 or the App Server on port 8000 has a root of `Docs/`.
- Either no App Server is running on port 8002 or the App Server on port 8002 has a root of `Apps/` OR `Apps/appbuilder`.

If the above conditions are met, then those App Servers are reconfigured during the MarkLogic 9 upgrade and the resulting configurations have the following settings:

App-Services:

| App-Services App Server |                   |
|-------------------------|-------------------|
| Port                    | 8000              |
| Name                    | App-Services      |
| Root                    | Apps/             |
| Error Handler           | error-handler.xqy |
| URL Rewriter            | rewriter.xqy      |
| Database                | App-Services      |

Manage:

| Manage App Server |                          |
|-------------------|--------------------------|
| Port              | 8002                     |
| Name              | Manage                   |
| Root              | Apps/                    |
| Error Handler     | manage/error-handler.xqy |
| URL Rewriter      | manage/rewriter.xqy      |
| Database          | App-Services             |
| Privilege         | manage                   |

If the conditions are not met, then the upgrade logs an error to the `ErrorLog.txt` file and the Application Services portion of the upgrade is skipped. MarkLogic Server will still operate, but you will not be able to use Query Console, the Management API, and the rest of the Application Services features. To restore the Application Services functionality after a failed upgrade, create two App Servers with the configurations shown above. If you have any problems, contact MarkLogic technical support.

### 1.6.2 MarkLogic 9 Databases are Compatible With MarkLogic 7 and MarkLogic 8

MarkLogic 9 does not require a reindex from MarkLogic 7 or MarkLogic 8 databases. Therefore, if you are upgrading from MarkLogic 7 or MarkLogic 8, the database will not reindex, even if `reindex enable` is set to `true`.



## 2.0 Procedures

This section describes the following procedures to install MarkLogic on your system.

- [Upgrading from Previous Releases](#)
- [Installing MarkLogic Server](#)
- [Starting MarkLogic Server](#)
- [Configuring the First and Subsequent Hosts](#)
- [Entering a License Key](#)
- [Checking for the Correct Software Version](#)
- [Configuring MarkLogic Server on UNIX Systems to Run as a Non-daemon User](#)
- [Removing MarkLogic Server](#)

### 2.1 Upgrading from Previous Releases

If you have previously installed MarkLogic on a machine, you must uninstall the old release before proceeding with the new installation. For information on removing the software, see “Removing MarkLogic Server” on page 25 or the *Installation Guide* from the previous release. This section describes the following information and upgrade paths:

- [Note That Reindexing is On By Default](#)
- [Upgrading from Release 9.0-1 or Later](#)
- [Upgrading from MarkLogic 7 or MarkLogic 8](#)
- [Upgrading from Release 6.0 or earlier](#)

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

#### 2.1.1 Note That Reindexing is On By Default

Before upgrading to MarkLogic 9 from MarkLogic 6 or earlier, be aware that database reindexing is enabled by default.

**Note:** If you are upgrading from MarkLogic 7 or MarkLogic 8, a reindex is not required, so you can skip this section.

If you have a very large database, or if you have many databases configured, they will start reindexing after you install MarkLogic 9, as soon as you accept the license key. Reindexing is a CPU and disk-intensive process, and it can take some time. Consequently, it can slow down the machine, particularly if the machine has a slow disk system (for example, a development laptop).

If you want to delay reindexing, set `reindex enable to false` in your database configurations *before* you install MarkLogic 9 (that is, you must set `reindex enable to false` in MarkLogic 6 or earlier). MarkLogic 9 will then run in 6.0 compatibility mode until reindexing is enabled and completes. To re-enable indexing, set `reindex enable to true` in each of your database configurations after completing the installation (that is, after accepting the license key and after performing the configuration and Security database upgrades). After reindexing has been enabled, it will commence immediately and continue until it is done, or until reindexing is disabled. For details about database compatibility, see “Upgrades and Database Compatibility” on page 6.

### 2.1.2 Upgrading from Release 9.0-1 or Later

To upgrade from release 9.0-1 or later to the current MarkLogic 9 release (for example, if you are installing a maintenance release of MarkLogic 9), perform the following basic steps:

1. Shut down MarkLogic 9 (as described in step 1 of “Removing MarkLogic Server” on page 25).
2. Uninstall the old release (as described in “Removing MarkLogic Server” on page 25).
3. Install the new MarkLogic 9 release (as described in “Installing MarkLogic Server” on page 12).

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

If you are upgrading two clusters that make use of database replication to replicate the Security database on the master cluster, then you must enter the following to manually upgrade the Security database configuration files on the machine that hosts the replica Security database:

```
http://host:8001/security-upgrade-go.xqy?force=true
```

**Warning:** There is no direct upgrade path from Early Access releases of MarkLogic 9 to this release. If you need to move any data from an Early Access release to this release, you must re-create the data in the current release.

### 2.1.3 Upgrading from MarkLogic 7 or MarkLogic 8

MarkLogic 9 installs in the same default directory as earlier versions of MarkLogic, so there is no need to move any old files around. The upgrade to MarkLogic 9 does incorporate an automatic update to the Security database and to the configuration files. The Security database upgrade occurs when you first access the Admin Interface after the MarkLogic 9 installation.

When upgrading to MarkLogic 9, you must first uninstall previous releases of MarkLogic Server. Uninstalling a previous release of MarkLogic does not remove or delete the user data files (the forests and configuration information).

**Note:** If you are upgrading a cluster of two or more servers, you must first upgrade the server in which the Security database is mounted. The Security database must be available before subsequent hosts can join the cluster.

The basic steps to upgrade from earlier version to MarkLogic 9 are as follows:

1. As a precaution, perform database backups on your earlier versions of MarkLogic Server databases.
2. If you are upgrading from MarkLogic 7 and do not want to reindex a database, disable reindexing for that database before installing the new release (for example, set `reindexer enable` to `false` on the Database Configuration page of the Admin Interface in MarkLogic 7). The entire database will be reindexed after upgrading to MarkLogic 9 unless you disable reindexing. For details, see “Upgrades and Database Compatibility” on page 6. You can always reindex the database later by setting `reindexer enable` database configuration option to `true`.
3. Shut down MarkLogic Server (as described in step 1 of “Removing MarkLogic Server” on page 25).
4. Uninstall MarkLogic Server (as described in “Removing MarkLogic Server” on page 25).
5. Install MarkLogic 9 (as described in “Installing MarkLogic Server” on page 12).
6. Start MarkLogic 9 (as described in “Starting MarkLogic Server” on page 15).
7. Open the Admin Interface in a browser (<http://localhost:8001/>).
8. When the Admin Interface prompts you to upgrade the Security database and the configuration files, click the button to confirm the upgrade.
9. If you have CPF installed in any database and you want to use any of the new pipelines in MarkLogic 9, then you must reinstall CPF for those databases. To reinstall CPF for a database, in the Admin Interface navigate to Databases -> *database-name* -> Content Processing, click the Install tab, and click the Reinstall button. This loads all of the new pipelines into the triggers database configured for that database.

There are some known application incompatibilities between MarkLogic 8 and MarkLogic 9, as well as some incompatibilities between MarkLogic 7 and MarkLogic 9. Some of the incompatibilities might require minor code changes to your applications. For details on these incompatibilities, see the [Release Notes](#).

### 2.1.4 Upgrading from Release 6.0 or earlier

MarkLogic 9 only supports upgrading from Release 7.0 or later; it does not provide a direct upgrade path for previous releases of MarkLogic Server. If you are upgrading from a 6.0 or earlier release of MarkLogic Server, either install this release as a clean installation or upgrade your existing release to the latest Release 7.0 or 8.0 before installing this release. For details on upgrading a Release 6.0 or earlier release, see the *Installation Guide* for MarkLogic Server 6.0. If you are upgrading from 6.0 and do not want to reindex your content, set the `reindexer.enable` to `false` before upgrading. You can run MarkLogic 9 in either 7.0 or 8.0 compatibility mode, as described in “Upgrades and Database Compatibility” on page 6.

## 2.2 Installing MarkLogic Server

This section describes the procedure for installing MarkLogic Server on each platform. Perform the procedure corresponding to the platform to which you are installing.

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

| Platform    | Perform the following:   |
|-------------|--|
| Windows x64 | <ol style="list-style-type: none"> <li data-bbox="428 1041 1414 1188">1. Shut down and uninstall the previous release of MarkLogic Server (if you are upgrading from 8.0 or 7.0, see “Upgrading from MarkLogic 7 or MarkLogic 8” on page 11, if you are upgrading from 9.0-1 or later, see “Removing MarkLogic Server” on page 25).</li> <li data-bbox="428 1209 1414 1314">2. Download the MarkLogic Server installation package to your desktop. The latest installation packages are available from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a>.</li> <li data-bbox="428 1335 1414 1482">3. Double click the <code>MarkLogic-9.0-1-amd64.msi</code> icon to start the installer.<br/><br/><b>Note:</b> If you are installing a release other than 9.0-1, double-click on the appropriately named installer icon.</li> <li data-bbox="428 1524 1414 1556">4. The Welcome page displays. Click Next.</li> <li data-bbox="428 1577 1414 1608">5. Select Typical.</li> <li data-bbox="428 1629 1414 1661">6. Click Install.</li> <li data-bbox="428 1682 1414 1713">7. Click Finish.</li> </ol> |

| Platform          | Perform the following:  |
|-------------------|---|
| Red Hat Linux x64 | <ol style="list-style-type: none"> <li data-bbox="428 279 1414 426">1. Shut down and uninstall the previous release of MarkLogic Server (if you are upgrading from 8.0 or 7.0, see “Upgrading from MarkLogic 7 or MarkLogic 8” on page 11, if you are upgrading from 9.0-1 or later, see “Removing MarkLogic Server” on page 25).</li> <li data-bbox="428 447 1414 810">2. Download the package to <code>/tmp</code> or another location using your web browser. The latest installation packages are available from the <a href="http://developer.marklogic.com">http://developer.marklogic.com</a>.<br/><br/><b>Note:</b> If you are using Firefox or another browser that is configured to associate <code>rpm</code> files, the browser will prompt you for the <code>root</code> password (if you are not already running as <code>root</code>) and you can follow the prompts to complete the installation. When the installation is complete, you can skip the next step. Otherwise, continue to the next step.</li> <li data-bbox="428 852 1414 1098">3. As the <code>root</code> user, install the package with the following command:<br/><br/><pre>rpm -i /tmp/MarkLogic-9.0-1.x86_64.rpm</pre><br/><b>Note:</b> If you are installing a release other than 9.0-1, replace the characters 9.0-1 in the line above with the appropriate release number.</li> <li data-bbox="428 1140 1414 1281">4. If you are using HDFS, make sure the server is configured to use HDFS with a Hadoop HDFS client and any needed environment variables set in the <code>/etc/sysconfig/MarkLogic</code> file. For details, see <a href="#">HDFS Storage</a> in the <i>Query Performance and Tuning Guide</i>.</li> </ol> |

| Platform | Perform the following:  |
|----------|---|
| Mac OS X | <ol style="list-style-type: none"> <li>1. Download the MarkLogic Server installation package to your desktop. The latest installation packages are available from the <a href="http://developer.marklogic.com">http://developer.marklogic.com</a>.</li> <li>2. Double click the <code>MarkLogic-9.0-1-x86_64.dmg</code> icon to open the folder that contains the <code>MarkLogic-9.0-1-x86_64.pkg</code> installer. Double click on the installer to start.</li> <li>3. The Welcome page displays. Click Continue.</li> <li>4. In the Select a Destination window, select a destination to install MarkLogic Server or Continue to select the default destination.</li> <li>5. In the Installation Type window, click Install. An Installation window appears that displays the progress of the installation.</li> <li>6. When the installation Summary window appears, click Close.</li> <li>7. A MarkLogic control window appears from which you can start/stop MarkLogic Server, open the Admin Interface, and view the Error Log.</li> </ol> |

The following table shows the installation directory (<marklogic-dir>) and the default data directory for each platform:

| Platform         | Installation Directory      | Default Data Directory<br>(for configuration and log files) |
|------------------|-----------------------------|---|
| Windows          | c:\Program Files\MarkLogic\ | c:\Program Files\MarkLogic\Data                             |
| Red Hat<br>Linux | /opt/MarkLogic              | /var/opt/MarkLogic  |
| Mac OS X         | ~/Library/MarkLogic         | ~/Library/Application Support/MarkLogic/Data                |

The default forest directory is the same as the default data directory if the optional data directory is not specified during forest creation. On UNIX platforms, if you want MarkLogic Server to use another location for its default data directory, make your data directory (`/var/opt/MarkLogic` on Linux) a soft link to the alternate location.

## 2.3 Starting MarkLogic Server

MarkLogic Server will automatically start when the computer reboots. To start MarkLogic Server without rebooting, perform the following command for the platform on which you are running:

| Platform      | Perform the following:   |
|---------------|--|
| Windows       | <p>Select Start &gt; Programs &gt; MarkLogic Server &gt; Start MarkLogic Server.</p> <p><b>Note:</b> When you start MarkLogic Server from the Start menu, the Windows service configuration for MarkLogic Server is set to start automatically. Also, if you are using Windows Vista or Windows 7, to start the service you must right-click the Start MarkLogic Server link in the Start menu and choose Run as Administrator, then choose to allow the action.</p> |
| Red Hat Linux | <p>As the <code>root</code> user, enter the following command:</p> <pre>/sbin/service MarkLogic start</pre>  |
| Mac OS X      | <p>Select System Preferences &gt; MarkLogic to open the MarkLogic control window. Click Start MarkLogic Server.</p>  |

This starts all of the App Servers that are configured on your MarkLogic Server.

## 2.4 Configuring the First and Subsequent Hosts

The following configuration procedures differ depending on if you run MarkLogic Server in a cluster configuration or on a single host. The procedures are as follows:

- [Configuring a Single Host or the First Host in a Cluster](#)
- [Configuring an Additional Host in a Cluster](#)
- [Leaving a Cluster and Becoming a Single Host](#)

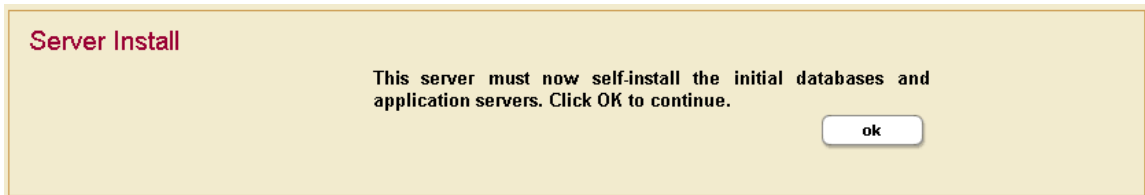
If you are configuring MarkLogic Server as a standalone host, or if this is the first host in a cluster configuration, follow the installation instructions in Section [2.4.1](#). Otherwise, follow the installation instructions in Section [2.4.2](#).

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

## 2.4.1 Configuring a Single Host or the First Host in a Cluster

To configure this installation as a single host, or as the first host in a cluster, perform the following steps:

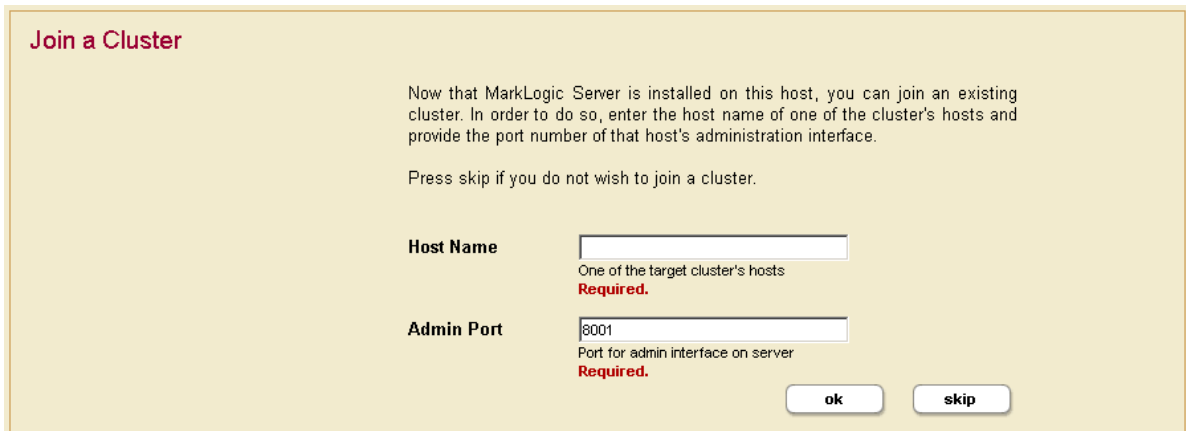
1. Install MarkLogic and start MarkLogic as described in “Installing MarkLogic Server” on page 12 and “Starting MarkLogic Server” on page 15.
2. Log into the Admin Interface in a browser. It is on port 8001 of the host in which MarkLogic is running (for example, on the localhost, <http://localhost:8001>). The Server Install page appears.



**Server Install**

This server must now self-install the initial databases and application servers. Click OK to continue.

3. Click OK to continue.
4. Wait for the server to restart.
5. After the server restarts, you will be prompted to join a cluster.



**Join a Cluster**

Now that MarkLogic Server is installed on this host, you can join an existing cluster. In order to do so, enter the host name of one of the cluster's hosts and provide the port number of that host's administration interface.

Press skip if you do not wish to join a cluster.

**Host Name**   
One of the target cluster's hosts  
**Required.**

**Admin Port**   
Port for admin interface on server  
**Required.**

6. Click Skip.



7. You will be prompted to create an admin user. Enter the login name and password for the admin user.

The screenshot shows a 'Security Setup' dialog box with a yellow background. It contains the following text and fields:

**Security Setup**

MarkLogic Server has detected that Administration has not been secured. Please supply a user name and password for the Administrative user to set up security.

You also need to specify a realm for this security database. This is the realm that will be displayed to clients authenticating against this database. Since this value is used in password hashes it is recommended that you not change this value once it is set. Please read the further documentation about realms.

**Admin**   
User/Login name (unique)  
**Required. You must supply a value for user-name.**

**Password**   
Encrypted Password.  
**Required.**

**Confirm Password**   
Encrypted Password.  
**Required.**

**Realm**   
The authentication realm.

8. Click OK.
9. You will be prompted to log in with your admin username and password.

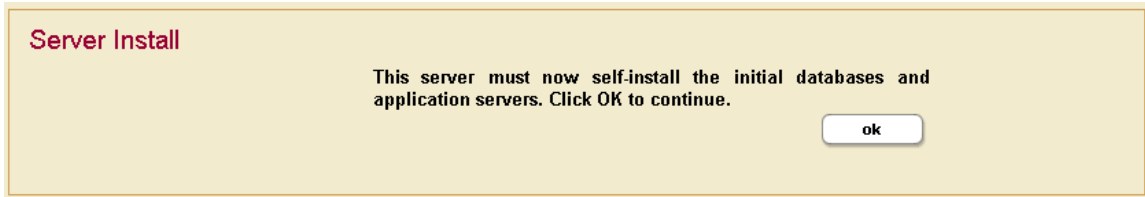
You will now see the Admin Interface. If you do not need to add any hosts at this time, skip to [Section 2.6](#) on page 21.

## 2.4.2 Configuring an Additional Host in a Cluster

All hosts in a cluster have to be on the same platform. To configure this installation as an additional host in a cluster of the same platform, perform the following steps:

1. On the node you want to add to an existing cluster, install MarkLogic and start MarkLogic, as described in “Installing MarkLogic Server” on page 12 and “Starting MarkLogic Server” on page 15.

2. Log into the Admin Interface in a browser. It is on port 8001 of the host in which MarkLogic is running (for example, on the localhost, `http://localhost:8001`). The Server Install page appears.

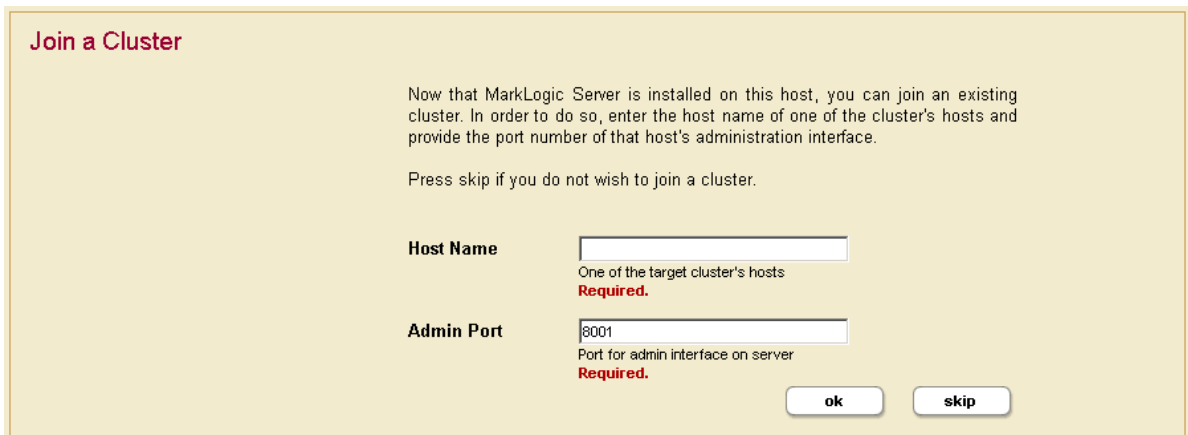


**Server Install**

This server must now self-install the initial databases and application servers. Click OK to continue.

ok

3. Click OK to continue.
4. Wait for the server to restart.
5. After the server restarts, you will be prompted to join a cluster.



**Join a Cluster**

Now that MarkLogic Server is installed on this host, you can join an existing cluster. In order to do so, enter the host name of one of the cluster's hosts and provide the port number of that host's administration interface.

Press skip if you do not wish to join a cluster.

**Host Name**   
One of the target cluster's hosts  
**Required.**

**Admin Port**   
Port for admin interface on server  
**Required.**

ok skip

6. Enter the DNS name or the IP address of one of the machines in the cluster. For instance, if this is the second host you are installing, you can enter the DNS name of the first host you installed.
7. Click OK.
8. You will be prompted for an admin username and password. You can use the admin username and password you created when installing the first host. Click OK.

9. Select a Group to assign this host. Click OK.



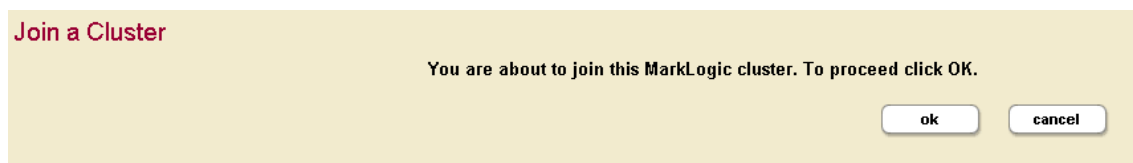
**Join a Cluster**

In order to join this MarkLogic cluster, the new host must be assigned to one of the cluster's groups and its name confirmed. Please select a group to join and confirm the new host's name:

**Group**  The groups in the cluster

**Host Name**  The name of the new host in the cluster.

10. Click OK to confirm that you are joining the cluster.



**Join a Cluster**

You are about to join this MarkLogic cluster. To proceed click OK.

11. You have now joined the cluster.



**Joined a Cluster**

**Joined a Cluster**  
**MarkLogic Server**

A new host has joined the MarkLogic cluster. Press ok to transfer cluster configuration information to the new host.

12. Click OK to transfer the cluster configuration information.

You have completed the process to join a cluster and will now see the Admin Interface.

### 2.4.3 Leaving a Cluster and Becoming a Single Host

If your host is currently in a cluster of multiple hosts, and you would like to leave the cluster and switch to a single host environment, follow the steps in this section.

A host cannot leave a cluster if there are still forests assigned to it or if it has any foreign clusters associated with it. You must delete all forests assigned to the host and de-couple any clusters associated with a host before you can leave the cluster. However, you can delete the configuration only for a forest and the forest data will remain on the filesystem, allowing you to add the forest back to the host after changing the configuration. For instructions on adding a forest to a host, see the *Administrator's Guide*.

Perform the following steps to leave the cluster to which a host is connected:

1. Run the Admin Interface from the host you want to remove from the cluster.
2. Click the Hosts icon in the left menu tree. The Host Summary page appears.
3. Click the name of the host you want to remove from the cluster, either from the left menu tree or from the Host Summary page. The Host Configuration page appears:

The screenshot shows a 'Host Configuration' dialog box. At the top, there are tabs for 'Summary', 'Configure', 'Status', and 'Help'. The 'Configure' tab is selected. Below the tabs are 'ok' and 'cancel' buttons. The main area is titled 'host -- The host specification.' and contains a 'leave' button. Below this are three fields: 'host name\*' with the value 'raymond.marklogic.com', 'group\*' with a dropdown menu set to 'Default', and 'bind port\*' with the value '7999'. Each field has a small text description below it. At the bottom, there is a note: '\* -- requires restart of one or more hosts' and two 'ok' and 'cancel' buttons.

**Note:** The Leave button only appears if the Admin Interface is running from this host.

4. Click the Leave button
5. Click OK to confirm leaving the cluster.
6. The host restarts to load the new configuration.
7. Follow the instructions in sections “Configuring a Single Host or the First Host in a Cluster” or “Configuring an Additional Host in a Cluster” as appropriate.

## 2.5 Entering a License Key

MarkLogic will run without a license key, but after installing MarkLogic you should enter a valid license key for the usage and features for which you are licensed. At any time, you can change the license key for a host from the Host Status page.

You might need to change the license key if your license key expires, if you need to use some features that are not covered in your existing license key, if you upgrade your hardware with more CPUs and/or more cores, if you need a license that covers a larger database, if you require different languages, or for various other reasons. Changing the license key sometimes results in an automatic restart of MarkLogic (for example, if your new license enables a new language).

To change the license key for a host, perform the following steps using the Admin Interface:

1. Click the Hosts icon on the left tree menu.
2. Click the name of the host for which you want to change the license key, either on the tree menu or the summary page. The Host Configuration page appears.
3. Click the Status tab. The Host Status page appears.
4. Click the License Key button. The License Key Entry page appears.
5. Enter your new license key information. For information about licensing of MarkLogic Server, contact your MarkLogic sales representative.
6. After entering valid information in the Licensee and License Key fields, click OK. If it needs to, MarkLogic will automatically restart, and the new license key will take effect.

## 2.6 Checking for the Correct Software Version

After logging in with your admin username and password, the Admin Interface appears. In the left corner of the Admin Interface, the version number and product edition are displayed.

To view more details about the release of MarkLogic Server that is installed and licensed, complete the following steps:

1. Click the Hosts icon on the left tree menu.
2. Select the name of the host you just installed, either from the left menu tree or from the Host Summary page.
3. Click the Status tab. The Host Status page appears.

4. Check that `<version>` is correct.

The screenshot shows the 'Host Status' page in the MarkLogic Admin Interface. The page title is 'Host: raymond.marklogic.com'. Below the title, there are buttons for 'license key', 'restart', and 'shutdown'. The main content area displays a table of host details:

|                          |  |
|--------------------------|--|
| Host                     | raymond.marklogic.com  |
| Group                    | Default  |
| Online                   | Host up since December 5, 2013 3:47:31 PM  |
| Version                  | 7.0-1  |
| License Key              | B081-1E63-7583-3C33-A9BB-9E11-EA07-68B9-C15E-A279-93DC-17EA-37B8-F991-3A20   |
| Licensee                 | raymond  |
| Edition                  | Essential Enterprise Edition   |
| Environment              | production   |
| CPUs                     | 2  |
| Cores                    | 32   |
| Options                  | conversion, failover, geospatial, alerting, entity enrichment, compartment security, flexible replication, tiered storage, semantics, Spanish, English |
| Data Directory Available | 7,239 MB   |
| Log Space Available      | 7,239 MB   |

To begin using MarkLogic Server, see the following document:

- *Getting Started With MarkLogic Server*

Otherwise, you are finished with the Admin Interface for now. You have successfully installed MarkLogic on your system.

## 2.7 Configuring MarkLogic Server on UNIX Systems to Run as a Non-daemon User

On UNIX-based systems (Linux), MarkLogic runs as the UNIX user named `daemon`. This section describes how to change a configuration to run as a different named UNIX user. This procedure must be run by the `root` user. Additionally, the `root` user is still required for installing and uninstalling MarkLogic and for starting and stopping MarkLogic from the startup scripts.

To modify an installation to run as a user other than `daemon`, perform the following steps:

1. In a command window on the machine in which you installed MarkLogic, log in as the `root` user.

2. Make sure MarkLogic is stopped. If it is still running, stop it as follows:

| Platform      | Perform the following to stop MarkLogic:   |
|---------------|--|
| Red Hat Linux | As the <code>root</code> user, enter the following command:<br><br><code>/sbin/service MarkLogic stop</code> |

3. Edit the configuration file for your platform using a text editor such as `vi`.

| Platform      | Configuration File to Edit       |
|---------------|----------------------------------|
| Red Hat Linux | <code>/etc/marklogic.conf</code> |

You must create the `/etc/marklogic.conf` file if it does not exist. This file is only read by the MarkLogic startup; it is never written to; therefore, it will survive an uninstallation of MarkLogic.

4. In the file, edit the `MARKLOGIC_USER` environment variable to point to the user in which you want MarkLogic Server to run. For example, if you want it to run as a user named `raymond`, change the following line:

```
MARKLOGIC_USER=daemon
```

to the following:

```
MARKLOGIC_USER=raymond
```

5. Save the changes to the `/etc/marklogic.conf` file.
6. If you have not yet started MarkLogic after performing a clean installation (that is, after installing into a directory where MarkLogic has never been installed), then you are done and you can skip the rest of the steps in this procedure. If you have an existing installation (for example, if you are upgrading to a maintenance release), then continue with the following steps.

7. For all of the MarkLogic files owned by `daemon`, you need to change the owner to the new user. This includes all forest data and all of the configuration files. By default, the forest data is in the following directories:

| Platform      | Default Data Directory<br>(for configuration and log files, and<br>default forest directory) |
|---------------|--|
| Red Hat Linux | <code>/var/opt/MarkLogic</code>  |

For example, on a Linux system, perform a command similar to the following, which changes the owner to the user specified earlier in the `/etc/sysconfig/MarkLogic` file:

```
chown -R raymond /var/opt/MarkLogic
```

8. Make sure to change the owner for all forests in the system, otherwise forests will fail to mount upon startup. Note that the above command only changes the owner for forests installed in the default directory. You need to run a similar command on the data directory for each forest in which a data directory is specified.
9. When you have completed all the file and directory ownership changes, start MarkLogic as described in “Starting MarkLogic Server” on page 15.

Once you have performed this procedure, all new files created by MarkLogic are created with the new user ownership; there will be no need to change any ownership again.

**Warning:** On Linux systems, use the `/etc/marklogic.conf` script to set environment variables. Any configuration changes you make to the MarkLogic-supplied startup script (for example, `/etc/sysconfig/MarkLogic`) will not survive an upgrade and need to be merged in during any upgrade of MarkLogic (because the installation installs a new version of the startup scripts). Under Linux, the unistallation process saves an old version of the scripts (for example, `/etc/sysconfig/MarkLogic.rpmsave`), so you can use that version to merge in your changes. If you perform a clean installation (not an upgrade installation), however, you will need to run this entire procedure again. If you use `/etc/marklogic.conf` for your environment variable changes, they will survive an upgrade and you will not need to merge your changes.



The following are default values of environment variables you can override in `/etc/marklogic.conf` on Linux-based systems (you will have to create the file if it does not exist):

```
MARKLOGIC_INSTALL_DIR=/opt/MarkLogic
MARKLOGIC_DATA_DIR=/var/opt/MarkLogic
MARKLOGIC_FSTYPE=ext4
MARKLOGIC_USER=daemon
MARKLOGIC_PID_FILE=/var/run/MarkLogic.pid
MARKLOGIC_UMASK=022
MARKLOGIC_DISABLE_JVM=0
MARKLOGIC_EC2_HOST
TZ=:/etc/localtime
```

## 2.8 Removing MarkLogic Server

To remove MarkLogic from your system, complete the following steps:

1. Stop MarkLogic by performing the following actions, based on the platform in which you are running:

| Platform      | Perform the following:   |
|---------------|--|
| Windows       | <p>Select Start &gt; Programs &gt; MarkLogic Server &gt; Stop MarkLogic Server.</p> <p><b>Note:</b> If you are using Windows Vista or Windows 7, to stop the service you must right-click the Stop MarkLogic Server link in the Start menu and choose Run as Administrator, then choose to allow the action.</p> |
| Red Hat Linux | <p>As the <code>root</code> user, enter the following command:</p> <pre>/sbin/service MarkLogic stop</pre>   |
| Mac OS X      | <p>Select System Preferences &gt; MarkLogic to open the MarkLogic control window. Click Stop MarkLogic Server.</p>   |

2. Once the server is stopped, you can uninstall MarkLogic package by performing the following actions, based on the platform in which you are running:

| Platform      | Perform the following:  |
|---------------|---|
| Windows       | Use the Add/Remove Programs Control Panel to uninstall MarkLogic.   |
| Red Hat Linux | As the <code>root</code> user, enter the following command:<br><br><pre data-bbox="678 575 932 604">rpm -e MarkLogic</pre>  |
| Mac OS X      | <p data-bbox="557 632 1065 667">No action is necessary when upgrading.</p> <p data-bbox="557 709 1198 779">If you want to remove the user data and do a fresh install, then remove the following directory:</p> <pre data-bbox="557 821 1187 848">~/Library/Application Support/MarkLogic/Data</pre> <p data-bbox="557 884 1243 953">To entirely remove MarkLogic, remove the following directories:</p> <pre data-bbox="557 995 1187 1108">~/Library/MarkLogic ~/Library/Application Support/MarkLogic ~/Library/StartupItems/MarkLogic ~/Library/PreferencePanes/MarkLogic.prefPane</pre> <p data-bbox="557 1142 1224 1247">To make Mac OS X completely forget it ever had a MarkLogic installation, run the following command from a terminal window:</p> <pre data-bbox="557 1289 1159 1316">sudo pkgutil --forget com.marklogic.server</pre> |

**Note:** Using this procedure to remove MarkLogic from your system will not remove user data (configuration information, XQuery files used by HTTP or XDBC servers, or forest content). This data is left in place to simplify the software upgrade process. If you wish to remove the user data, you must do so manually using standard operating system commands.

## 3.0 Copyright

MarkLogic Server 9.0 and supporting products.  
Last updated: April 28, 2017

### **COPYRIGHT**

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This technology is protected by U.S. Patent No. 7,127,469B2, U.S. Patent No. 7,171,404B2, U.S. Patent No. 7,756,858 B2, and U.S. Patent No 7,962,474 B2, US 8,892,599, and US 8,935,267.

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## 4.0 Technical Support

MarkLogic provides technical support according to the terms detailed in your Software License Agreement or End User License Agreement.

We invite you to visit our support website at <http://help.marklogic.com> to access information on known and fixed issues, knowledge base articles, and more. For licensed customers with an active maintenance contract, see the [Support Handbook](#) for instructions on registering support contacts and on working with the MarkLogic Technical Support team.

Complete product documentation, the latest product release downloads, and other useful information is available for all developers at <http://developer.marklogic.com>. For general questions, join the [general discussion mailing list](#), open to all MarkLogic developers.