MarkLogic Server

Installation Guide for All Platforms

MarkLogic 6
September, 2012

Last Revised: 6.0-1, September, 2012

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Table of Contents

Installation Guide for All Platforms

1.0 Requirements and Database Compatibility 4
1.1 Introduction 4
1.2 Memory, Disk Space, and Swap Space Requirements 5
1.3 Supported Platforms 6
1.4 Certified Filesystems 7
1.5 Upgrades and Database Compatibility 7
1.5.1 Prerequisites for Application Services Portion of the Upgrade 8
1.5.2 MarkLogic 6 Database Compatibility With 4.2, 4.1, and 4.0 9
1.5.3 4.0 Database Compatibility With 3.2 9
1.5.4 3.2 Database Compatibility With 3.1 10
1.5.5 3.1/3.2 Database Compatibility With 3.0 10

2.0 Procedures 13
2.1 Upgrading from Previous Releases 13
2.1.1 Note That Reindexing is On By Default 14
2.1.2 Upgrading from Release 6.0-1 or Later 14
2.1.3 Upgrading from Release 5.0, 4.2, or 4.1 15
2.1.4 Upgrading from Release 4.0 or earlier 16
2.2 Turning Off Internet Explorer User-Friendly HTTP Messages 16
2.3 Installing MarkLogic Server 18
2.4 Starting MarkLogic Server 21
2.5 Entering the License Key and Accepting the License Agreement 22
2.6 Configuring a New Installation 25
2.7 Enterprise Edition: Configuring the First and Subsequent Hosts 27
2.7.1 Enterprise Edition: Configuring a Single Host or the First Host in a Cluster 27
2.7.2 Enterprise Edition: Configuring an Additional Host in a Cluster 29
2.7.3 Enterprise Edition: Leaving a Cluster and Becoming a Single Host 31
2.8 Checking for the Correct Software Version 32
2.9 Configuring MarkLogic Server on UNIX Systems to Run as a Non-daemon User . 33
2.10 Removing MarkLogic Server 35

3.0 Technical Support 37

Combined Product Notices 38
COPYRIGHT 38

TRADEMARK NOTICE 50

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
- Memory, Disk Space, and Swap Space Requirements
- Supported Platforms
- Certified Filesystems
- Upgrades and Database Compatibility

1.1 Introduction

MarkLogic Server is a powerful software solution for harnessing your digital content base. MarkLogic Server enables you to build complex applications that interact with large volumes of content in XML, SGML, HTML and other popular content formats. The unique architecture of MarkLogic Server 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 Server Enterprise Edition can be configured for a distributed environment, enabling you to scale your infrastructure through hardware expansion.

This document describes how to install MarkLogic Server on your system. It covers both Enterprise and Standard Edition on all supported platforms. It is intended for a technical audience, specifically an IT staff with experience in XML.

This installation guide explains the procedures needed to install MarkLogic Server on your system. 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 following documents (available on developer.marklogic.com):

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

1.2 Memory, Disk Space, and Swap Space Requirements

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

- 512 MB of system memory, minimum. 2 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.

- 3 times the disk space of the total forest size. Specifically, each forest on a filesystem requires its filesystem to have at least 3 times the forest size in disk space. This translates to three 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 10 GB database, reserve at least 30 GB of disk space. The disk space reserve is required for merges.

- On Solaris systems, swap space at least equal to the amount of physical memory on the machine. Swap space equal to twice the amount of physical memory is highly recommended.

  For example, if you have a Solaris machine with 32 GB of memory, you should ideally configure the swap space to be 64 GB (and at least 32 GB).

- On Windows systems twice the physical memory is also recommended for the swap (page) file, but the system is normally set up to grow the swap (page) file as needed.

- On Linux systems, swap space equal to the amount of physical memory on the machine. MarkLogic also recommends setting Linux Huge Pages on Red Hat 5 and Red Hat 6 systems to 3/8 the size of your physical memory. For details on setting up Huge Pages, see http://magazine.redhat.com/2007/05/29/how-do-i-set-up-hugepages-in-red-hat-enterprise-linux-4/.

  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). For example, if you have 64GB of physical memory, and if you have Huge Pages set to 24 GB, then you need swap space of 40 GB (64 - 24).

  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 6, you must turn off Transparent Huge Pages (Transparent Huge Pages are configured automatically by the operating system).

1.3 Supported Platforms

MarkLogic Server is supported on the following platforms:

- Microsoft Windows Server 2008 (x64), Windows Vista 64-bit Edition (x64), Windows 7 64-bit (x64)*
- Sun Solaris 10 (x64)
- Red Hat Enterprise Linux 5 (x64)** *** ****
- Red Hat Enterprise Linux 6 (x64)** *** ****
- SUSE Linux Enterprise Server 11 (x64)** ***
- CentOS 5 (x64)** ***
- CentOS 6 (x64)** ***
- Mac OS X 10.6 or 10.7*****

* Microsoft Windows Vista and Windows 7 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.

** The deadline I/O scheduler is required on Red Hat Linux platforms. The deadline scheduler is optimized to ensure efficient disk I/O for multi-threaded processes, and MarkLogic Server can have many simultaneous threads. For information on the deadline scheduler, see the Red Hat documentation (for example, http://www.redhat.com/magazine/008jun05/features/schedulers/).

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

****Red Hat Linux 5 and 6 (x64) are also supported in a VMWare ESX 3.0.2, ESX 3.5.3, ESX 4.0, or ESXi 5.0 (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 10.6 or 10.7 (Snow Leopard or Lion) on a 64-bit capable processor is required (http://support.apple.com/kb/HT3696).

1.4 Certified 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 certified. Other filesystems may work but have not been thoroughly tested by MarkLogic.

Operating System	Certified Filesystems
Linux (all varieties)	EXT3, EXT4, as well as the clustered filesystems for shared-disk failover mentioned in Requirements for Shared-Disk Failover in the *Scalability, Availability, and Failover Guide*.
Sun Solaris	UFS, as well as the clustered filesystems for shared-disk failover mentioned in Requirements for Shared-Disk Failover in the *Scalability, Availability, and Failover Guide*.
Windows	NTFS
Mac OS	HFS+

1.5 Upgrades and Database Compatibility

MarkLogic 6 supports upgrades from MarkLogic Server 4.1 or from MarkLogic Server 4.2-*x* or later databases. If you are upgrading from an earlier version of MarkLogic Server, you must first upgrade to 4.1 or 4.2 before moving to MarkLogic 6. For the procedure for upgrading to MarkLogic Server 4.1 or 4.2, see “Upgrading from Previous Releases” on page 13.

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 6; once you upgrade to MarkLogic 6, you will no longer be able to use that database with MarkLogic Server 4.2 or 4.1. MarkLogic Corporation strongly recommends performing a backup of your databases before upgrading to MarkLogic 6. Additionally, MarkLogic Corporation recommends that you first upgrade to the latest maintenance release of 4.1 or 4.2 before upgrading to MarkLogic 6.

For the procedure for upgrading to MarkLogic 6, see “Upgrading from Previous Releases” on page 13. For details about known incompatibilities between MarkLogic Server 4.1, 4.2, and MarkLogic 6, 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 6 Database Compatibility With 4.2, 4.1, and 4.0
- 4.0 Database Compatibility With 3.2
- 3.2 Database Compatibility With 3.1
- 3.1/3.2 Database Compatibility With 3.0

1.5.1 Prerequisites for Application Services Portion of the Upgrade

When Upgrading from 4.1 or 4.2 to MarkLogic 6, the upgrade reconfigures the Docs and App Services App Servers, which by default are on port 8000 and port 8002 in 4.2. In order for those App Servers to be upgraded, the following conditins 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 6 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, Application Builder, Information Studio, 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 configuration shown above. If you have any problems, contact MarkLogic technical support.

1.5.2 MarkLogic 6 Database Compatibility With 4.2, 4.1, and 4.0

MarkLogic 6 databases include improvements compared to 4.2 and earlier databases. Therefore, to take advantage of these improvements, you need to reindex your 4.2 or earlier databases in MarkLogic 6. When you upgrade to MarkLogic 6, all databases with `reindex enable` set to `true` will automatically begin reindexing immediately. If you do not want the databases to reindex, you must set `reindex enable` to `false` *before* upgrading (that is, you must set `reindex enable` to `false` in 4.2 or 4.1). You can always reindex your content later by changing this setting back to `true` after installing MarkLogic 6.

Also, you can reindex your content a little bit at a time by enabling reindexing for a while, then disabling it for a while, then enabling it, and so on. You might want to use this technique to reindex your database during non-peak hours, for example, over a period of hours or days or weeks, depending on how large your database is. Always ensure that you have the proper system requirements, as defined in “Memory, Disk Space, and Swap Space Requirements” on page 5.

1.5.3 4.0 Database Compatibility With 3.2

Note: This section is here for reference only about the compatibility between MarkLogic Server 4.0 and 3.2.

MarkLogic Server 4.0 databases can have several new indexes compared to 3.2 databases. Therefore, to take advantage of these new features, you need to reindex your 3.2 databases in 4.0. When you upgrade to 4.0, all databases with `reindex enable` set to `true` will automatically begin reindexing immediately. If you do not want the databases to reindex, you must set `reindex enable` to `false` *before* upgrading (that is, you must set `reindex enable` to `false` in 3.2). You can always reindex your content later by changing this setting back to `true` after installing MarkLogic Server 4.0.

Also, you can reindex your content a little bit at a time by enabling reindexing for a while, then disabling it for a while, then enabling it, and so on. You might want to use this technique to reindex your database during non-peak hours, for example, over a period of hours or days or weeks, depending on how large your database is. Always ensure that you have the proper system requirements, as defined in "Memory, Disk Space, and Swap Space Requirements" on page 5.

1.5.4 3.2 Database Compatibility With 3.1

Note: This section is here for reference only about the compatibility between MarkLogic Server 3.2 and 3.1.

MarkLogic Server 3.2 and newer databases are language-aware. Details such as stemming and tokenization are different for different languages. For an overview of how languages work in MarkLogic Server, see the "Languages, Encodings, and Collations" chapter of the *Application Developer's Guide*.

Because of the differences in stemming and tokenization between languages, and because MarkLogic Server allows you to specify languages at the element level, the index data in MarkLogic Server databases contains language-specific information. Additionally, there are other features in 3.2 that require 3.2 (or newer) indexes.

When you upgrade to 3.2, all databases with `reindex enable` set to `true` will begin reindexing immediately. If you do not want the databases to reindex, you must set `reindex enable` to `false` *before* upgrading (that is, you must set `reindex enable` to `false` in 3.1). You can always reindex your content later by changing this setting back to `true` after installing MarkLogic Server 3.2.

MarkLogic Server 3.2 automatically detects the format of the content in the database. If you do not reindex the content when upgrading to 3.2 (that is, if you set `reindex enable` to `false` in your database configuration *before* you install 3.2), then the database will run in compatibility mode, and certain 3.2 features will be disabled (for example, non-English languages and `cts:frequency` for lexicon values).

1.5.5 3.1/3.2 Database Compatibility With 3.0

Note: This section is here for reference only about the compatibility between MarkLogic Server 3.1 and 3.0.

You can have this same level of compatibility as other versions and 4.0 between 4.0 and 3.0 as well. You must upgrade to MarkLogic Server 3.1 before upgrading to MarkLogic Server 3.2 and 4.0. For details on upgraded from 3.0 to 3.1, see the MarkLogic Server 3.1 *Installation Guide*.

MarkLogic Server 3.1 and newer has diacritic-aware indexes. MarkLogic Server 3.0 does not have diacritic-aware indexes. Therefore, databases created with 3.0 will have different default behavior in 3.1 in the handling of searches that involve diacritic characters. Additionally, databases created in 3.0 that are not reindexed might miss diacritic-insensitive matches on `cts:search` operations. Note the following about user-created databases that are upgraded to MarkLogic Server 3.1:

- If reindexing is enabled, MarkLogic Server 3.1 will reindex any 3.0 database in order to rebuild the default text indexes as diacritic-insensitive indexes. After the reindex operation is completed, all diacritic searches will work correctly.
- If reindexing is not enabled, then diacritic searches using MarkLogic Server 3.1 will behave differently against 3.0 databases than 3.1 databases. Any `cts:search` operations on upgraded, un-reindexed 3.0 databases, with terms that incorporate diacritics (in the search specification or in the content loaded in MarkLogic Server) have the following characteristics:
    - If the term passed to `cts:search` incorporates one or more diacritic characters, and the search is either explicitly or implicitly `diacritic-sensitive`, then the search will work correctly.
    - If the term passed to `cts:search` incorporates one or more diacritic characters, and the search is explicitly `diacritic-insensitive`, then the search will not match terms in the source content that had diacritics.
    - If the term passed to `cts:search` does not incorporate any diacritic characters, and the search is explicitly `diacritic-sensitive`, then the search will work correctly.
    - If the term passed to `cts:search` does not incorporate any diacritic characters, and if the search is implicitly or explicitly `diacritic-insensitive`, then the search will not match terms in the source content that incorporated diacritics (even though you specified `diacritic-insensitive` matches).
- If the source content does not incorporate diacritic characters, or if diacritic-related recall is not important to your application, these incomplete search issues may not pose a problem for you. However, you should understand that at any point in the future, if you enable reindexing, the database will undertake this reindexing task concurrently with any other reindexing tasks that may be required.
- Note that the database has no way to know whether or not your source content incorporates diacritics, so if reindexing is enabled, it will reindex all the documents in order to ensure that text indexes are diacritic-aware.
- Any new or changed content will be added diacritic-aware, potentially creating different diacritic behavior for different parts of your content set.

- If you choose not to reindex your 3.0 database, and if you always specify the `diacritic-sensitive` option to `cts:search`, then your results will be the same as they were in MarkLogic Server 3.0.

2.0 Procedures

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

- Upgrading from Previous Releases
- Turning Off Internet Explorer User-Friendly HTTP Messages
- Installing MarkLogic Server
- Starting MarkLogic Server
- Entering the License Key and Accepting the License Agreement
- Configuring a New Installation
- Enterprise Edition: Configuring the First and Subsequent Hosts
- Checking for the Correct Software Version
- Configuring MarkLogic Server on UNIX Systems to Run as a Non-daemon User
- Removing MarkLogic Server

Be sure to complete each procedure in the order presented.

2.1 Upgrading from Previous Releases

If you have previously installed MarkLogic Server 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 35 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 6.0-1 or Later
- Upgrading from Release 5.0, 4.2, or 4.1
- Upgrading from Release 4.0 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 6 from MarkLogic 5, 4.2, or 4.1, be aware that database reindexing is enabled by default. If you have a very large database, or if you have many databases configured, they will start reindexing after you install MarkLogic 6, 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 6 (that is, you must set `reindex enable` to `false` in MarkLogic 5, 4.2, or 4.1). MarkLogic 6 will then run in 5.0, 4.2, or 4.1 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 7.

2.1.2 Upgrading from Release 6.0-1 or Later

To upgrade from release 6.0-1 or later to the current MarkLogic 6 release, perform the following basic steps:

1. Shut down MarkLogic 6 (as described in step 1 of “Removing MarkLogic Server” on page 35).
2. Uninstall the old MarkLogic 6 release (as described in “Removing MarkLogic Server” on page 35).
3. Install the new MarkLogic 6 release (as described in “Installing MarkLogic Server” on page 18).

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*.

If you are upgrading two clusters that make use of database replication to replicate the security database on the master cluster, then, after accepting the license agreement on the replica cluster, 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 6 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 Release 5.0, 4.2, or 4.1

MarkLogic 6 installs in the same default directory as MarkLogic 5, 4.2, and 4.1, so there is no need to move any old files around. The upgrade to MarkLogic 6 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 6 installation (and after accepting the license agreement).

Uninstalling a previous release of MarkLogic Server does not remove or delete the user data files (the forests and configuration information). When upgrading to MarkLogic 6, you must first uninstall previous releases of MarkLogic Server.

> **Note:** For Enterprise Edition installations, 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 MarkLogic 5, 4.2, or 4.1 to MarkLogic 6 are as follows:

1. As a precaution, perform database backups on your MarkLogic Server 5.0, 4.2, or 4.1 databases.
2. If you do not want to reindex a database, disable reindexing for that database before installing MarkLogic Server 5.0, 4.2, or 4.1 (set `reindexer enable` to `false` on the Database Configuration page of the Admin Interface). The entire database will be reindexed after upgrading to MarkLogic 6 unless you disable reindexing. For details, see "Upgrades and Database Compatibility" on page 7. You can always reindex the database later by setting `reindexer enable` database configuration option to `true`.
3. Shut down MarkLogic Server 5.0, 4.2, or 4.1 (as described in step 1 of "Removing MarkLogic Server" on page 35).
4. Uninstall MarkLogic Server 5.0, 4.2 or 4.1 (as described in "Removing MarkLogic Server" on page 35).
5. Install MarkLogic 6 (as described in "Installing MarkLogic Server" on page 18).
6. Start MarkLogic 6 (as described in "Starting MarkLogic Server" on page 21).
7. Open the Admin Interface in a browser (http://localhost:8001/).
8. Accept the license agreement.

   > **Note:** Accepting this license agreement is optional. However, to begin using MarkLogic Server, you must accept the terms and conditions outlined in the license agreement. If you have executed a written software license with MarkLogic Corporation, the agreement displayed references that written agreement.

9. When the Admin Interface prompts you to upgrade the Security database and the configuration files, click the button to confirm the upgrade.

10. If you have CPF installed in any database and you want to use any of the new pipelines in MarkLogic 6, 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 6 and MarkLogic 5, as well as some incompatibilities between 5.0, 4.2, and 4.1. 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 4.0 or earlier

MarkLogic 6 only supports upgrading from Release 4.1-1 or later; it does not provide a direct upgrade path for previous releases of MarkLogic Server. If you are upgrading from a 4.0 or earlier release of MarkLogic Server, either install this release as a clean installation or upgrade your existing release to the latest Release 5.0 before installing this release. For details on upgrading a MarkLogic Server Release 4.0 or earlier release, see the *Installation Guide* for MarkLogic Server 4.2. If you are upgrading from 4.0 and do not want to reindex your content, set the `reindexer enable` to `false` before upgrading. You can run MarkLogic 6 in either 3.0, 3.1, 3.2, 4.0, 4.1, 4.2, or 5.0 compatibility mode, as described in “Upgrades and Database Compatibility” on page 7.

2.2 Turning Off Internet Explorer User-Friendly HTTP Messages

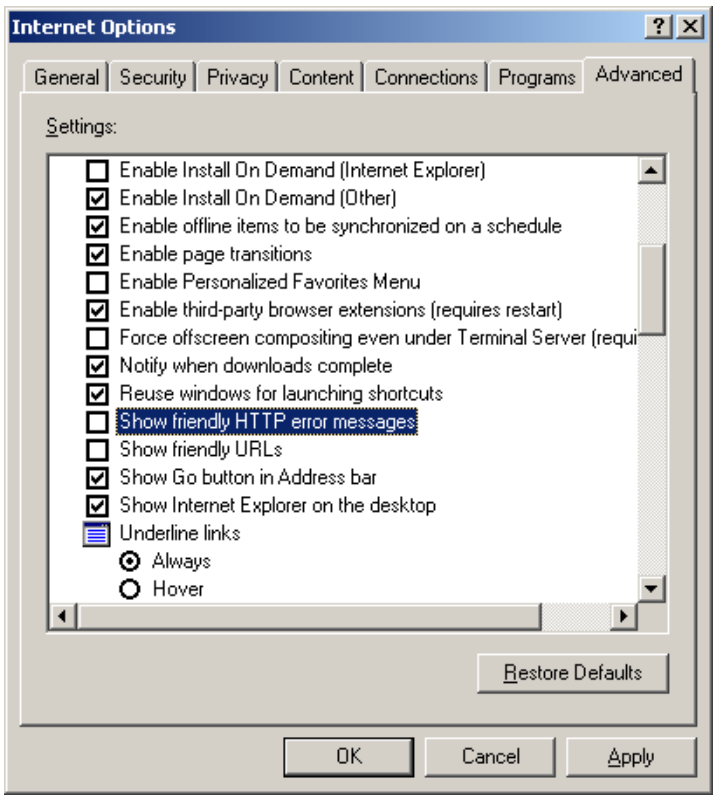
If you are using a Microsoft Internet Explorer browser, turn off the “Show friendly HTTP messages” option. Turning this option off allows any error messages from MarkLogic Server to display in full in your browser. Perform the following steps to turn this option off:

1. Start Internet Explorer.
2. Select Tools > Internet Options from the Internet Explorer menu.

   The Internet Options dialog box appears.

3. Click the Advanced tab.

4. Scroll down and uncheck the “Show friendly HTTP messages” option.



5. Click OK.

2.3 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*.

Platform	Perform the following:
Windows x64	1. Shut down and uninstall the previous release of MarkLogic Server (if you are upgrading from 5.0, 4.2, or 4.1, see "Upgrading from Release 5.0, 4.2, or 4.1" on page 15, if you are upgrading from 6.0-1 or later, see "Removing MarkLogic Server" on page 35). 2. Download the MarkLogic Server installation package to your desktop. The latest installation packages are available from http://developer.marklogic.com. 3. Double click the `MarkLogic-6.0-1-amd64.msi` icon to start the installer. **Note:** If you are installing a release other than 6.0-1, double-click on the appropriately named installer icon. 4. The Welcome page displays. Click Next. 5. Select Typical. 6. Click Install. 7. Click Finish.

Platform	Perform the following:
Red Hat Linux x64	1. Shut down and uninstall the previous release of MarkLogic Server (if you are upgrading from 5.0, 4.2, or 4.1, see "Upgrading from Release 5.0, 4.2, or 4.1" on page 15, if you are upgrading from 6.0-1 or later, see "Removing MarkLogic Server" on page 35). 2. Download the package to `/tmp` using your web browser. The latest installation packages are available from the http://developer.marklogic.com. **Note:** If you are using Firefox or another browser that is configured to associate `rpm` files, the browser will prompt you for the `root` password (if you are not already running as `root`) 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. 3. As the `root` user, install the package with the following command: `rpm -i /tmp/MarkLogic-6.0-1.amd64.rpm` **Note:** If you are installing a release other than 6.0-1, replace the characters 6.0-1 in the line above with the appropriate release number.

Sun Solaris x64	1. Shut down and uninstall the previous release of MarkLogic Server (see "Removing MarkLogic Server" on page 35).
	2. Download the package to `/var/spool/pkg` using your web browser. The latest installation packages are available from http://developer.marklogic.com.
	3. Unpack the compressed tar file in `/var/spool/pkg` with the following shell commands:
	`% cd /var/spool/pkg`
	`% uncompress MARKlogic-6.0-1-amd64.tar.Z`
	`% tar xf MARKlogic-6.0-1-amd64.tar`
	`% rm MARKlogic-6.0-1-amd64.tar`
	Note: If you are installing a release other than 6.0-1, replace the characters 6.0-1 in the line above with the appropriate release number.
	4. As the `root` user, install the package with the following command:
	`# pkgadd MARKlogic`

Platform	Perform the following:
Mac OS X	1. Download the MarkLogic Server installation package to your desktop. The latest installation packages are available from the http://developer.marklogic.com. 2. Double click the `MarkLogic-6.0-1-x86_64.dmg` icon to open the folder that contains the `MarkLogic-6.0-1-x86_64.pkg` installer. Double click on the installer to start. 3. The Welcome page displays. Click Continue. 4. In the Select a Destination window, select a destination to install MarkLogic Server or Continue to select the default destination. 5. In the Installation Type window, click Install. An Installation window appears that displays the progress of the installation. 6. When the installation Summary window appears, click Close. 7. A MarkLogic control window appears from which you can start/stop MarkLogic Server, open the Admin Interface, and view the Error Log.

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

Platform	Installation Directory	Default Data Directory (for configuration and log files)
Windows	`c:\Program Files\MarkLogic\`	`c:\Program Files\MarkLogic\Data`
Red Hat Linux	`/opt/MarkLogic`	`/var/opt/MarkLogic`
Sun Solaris	`/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 and `/var/opt/MARKlogic` on Solaris) a soft link to the alternate location.

If you have an entity enrichment license, you must first install the entity enrichment packages before you can use the feature. For the installation procedure for entity enrichment, see Installing the Entity Enrichment Libraries in the *Search Developer's Guide*.

2.4 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	Select Start > Programs > MarkLogic Server > Start MarkLogic Server. **Note:** 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.
Red Hat Linux	As the `root` user, enter the following command: `/etc/init.d/MarkLogic start`
Sun Solaris	As the `root` user, enter the following command: `/etc/init.d/MarkLogic start`
Mac OS X	Select System Preferences > MarkLogic to open the MarkLogic control window. Click Start MarkLogic Server.

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

2.5 Entering the License Key and Accepting the License Agreement

If you are upgrading from MarkLogic Server 4.1, 4.2, 5.0, or an earlier MarkLogic 6 release, there is no need to enter a new license key for MarkLogic 6; the old key will continue to work in MarkLogic 6 for the features for which you are licensed. In that case, you can skip this section.

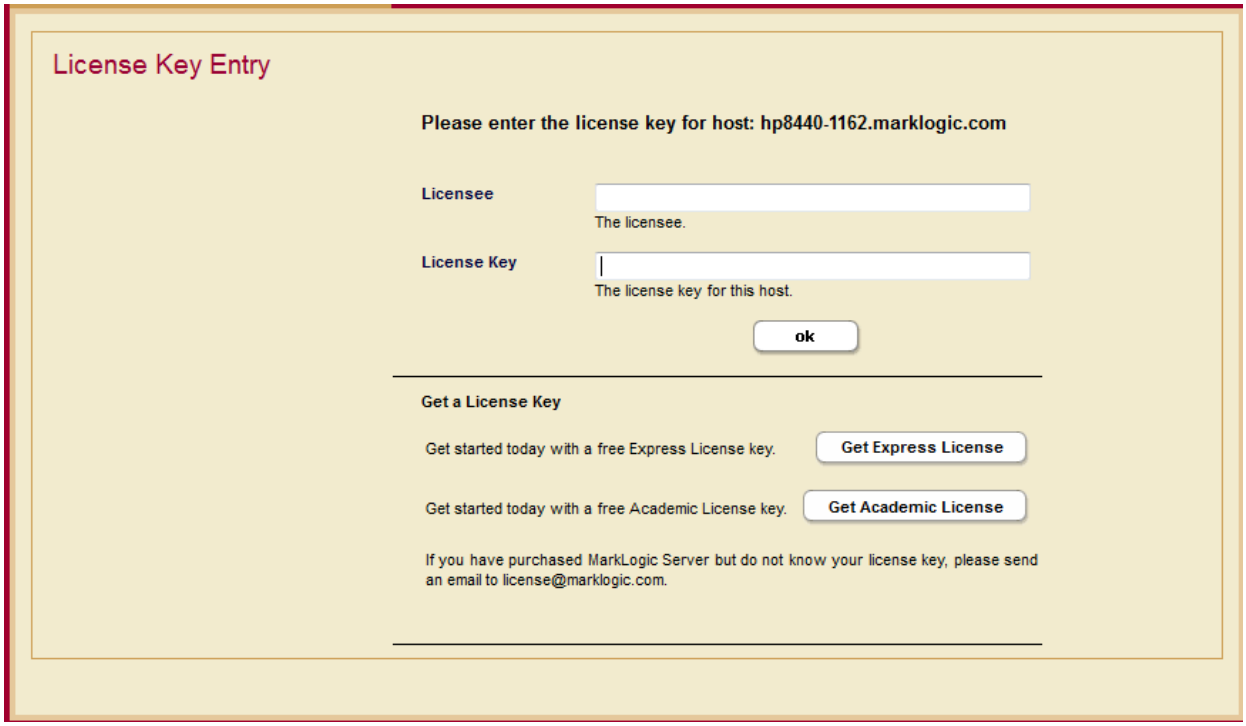
You must enter a valid license key before you can execute any queries in MarkLogic Server. If you downloaded MarkLogic Server from developer.marklogic.com, you can obtain a license key through the License Key Request screen in the Admin Interface. If you are a MarkLogic customer and obtained the release from support, you can obtain your license key from MarkLogic support.

To enter a license key, perform the following steps:

1. If you have not already done so, start MarkLogic Server as described in the previous section.
2. Open the Admin Interface in a browser. For example, if you are running your browser on the computer in which MarkLogic Server is running, open the following URL in a browser:

   http://localhost:8001/

3. The License Key Entry page appears.



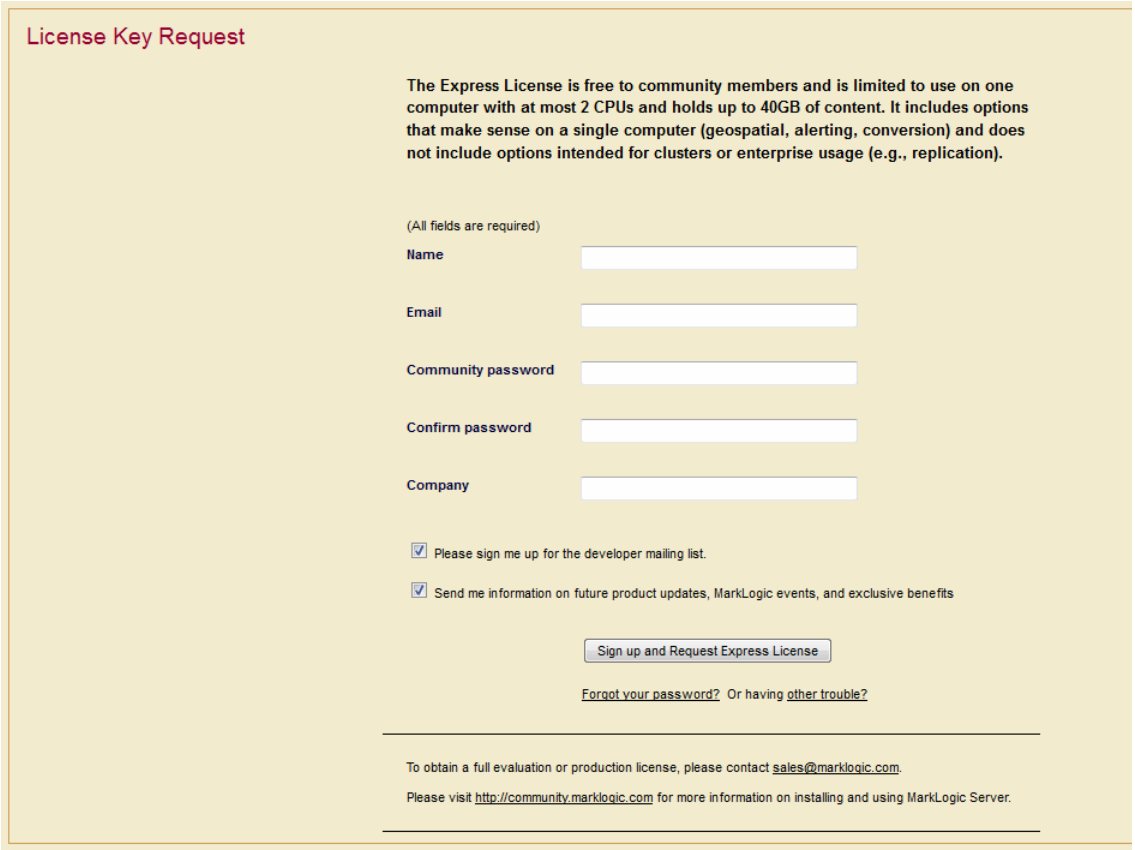
4. If you already have a license key, enter the name of the licensee in the Licensee field and the key in the License Key field. Skip to step 9 on page 24.

5. If you have purchased the software but do not have your license key, contact your sales representative or send an email to the specified address.

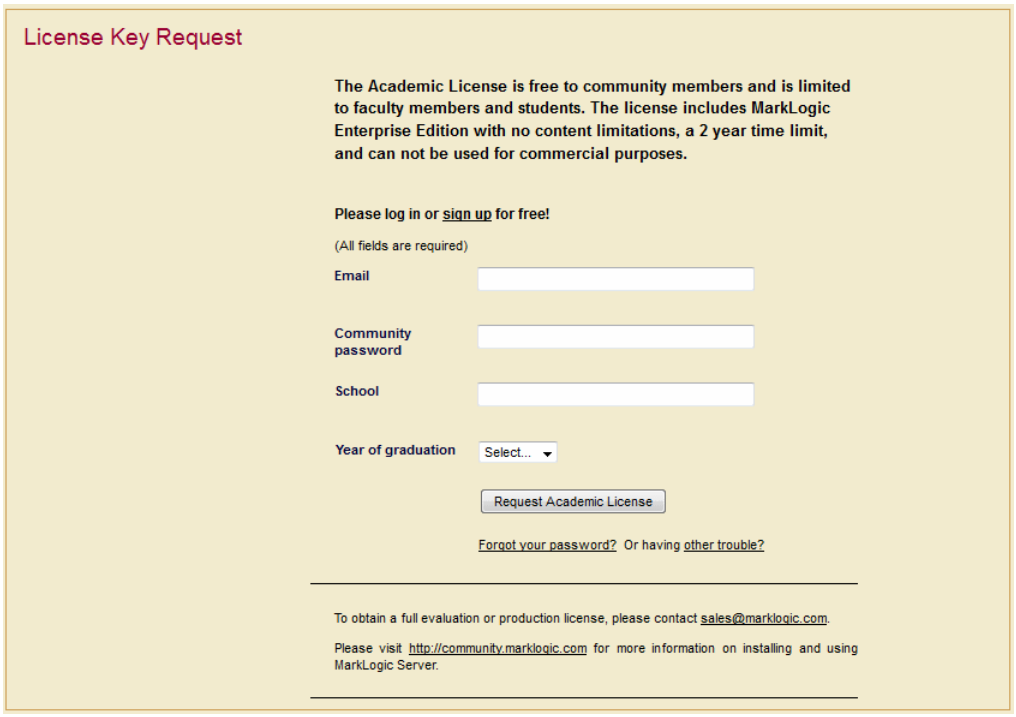
6. If you want to obtain a free, restricted-use license key for personal use or evaluation, click the Get Express License button. If you are using this for academia purposes and you want to get an academic license, click the Get Academic License button.

   The express license has capacity and usage restrictions; see the license agreement for details. The academic license is limited in term and has other restrictions; see the license agreement for details.

   After clicking the button, the License Key Request screen appears. The following is the Express License Key Request page:



The following is the Academic License Key Request page:



7. On the License Key Request form, if you are already registered on the community site, enter your email ID and password for the community site and fill in the other fields in the form. If you are not already registered on the community site, click the “sign up” link and register to get a license key.

   Note: The name of on your community site registration is associated with the license key that is issued.

8. Click the Request Express License or Request Academic License button.

   The License Key Generation screen appears.

9. Click the OK button.

   The server restarts and then the MarkLogic License Agreement screen appears.

10. On the MarkLogic License Agreement screen, read all terms and conditions of the MarkLogic License Agreement.

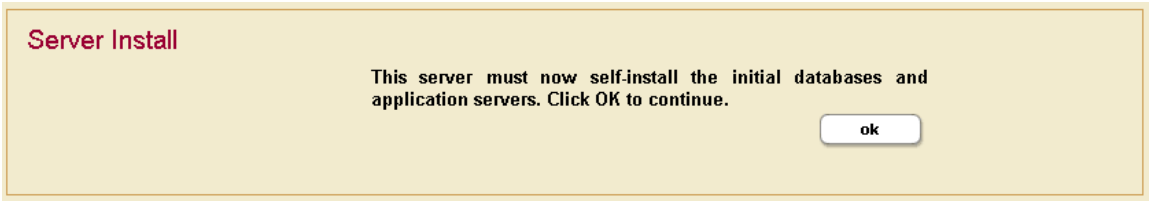
11. Click Accept to accept the license agreement.

    Note: Accepting this license agreement is optional. However, to begin using MarkLogic Server, you must accept the terms and conditions outlined in the license agreement. If you have executed a written software license with MarkLogic Corporation, the agreement displayed references that written agreement.

2.6 Configuring a New Installation

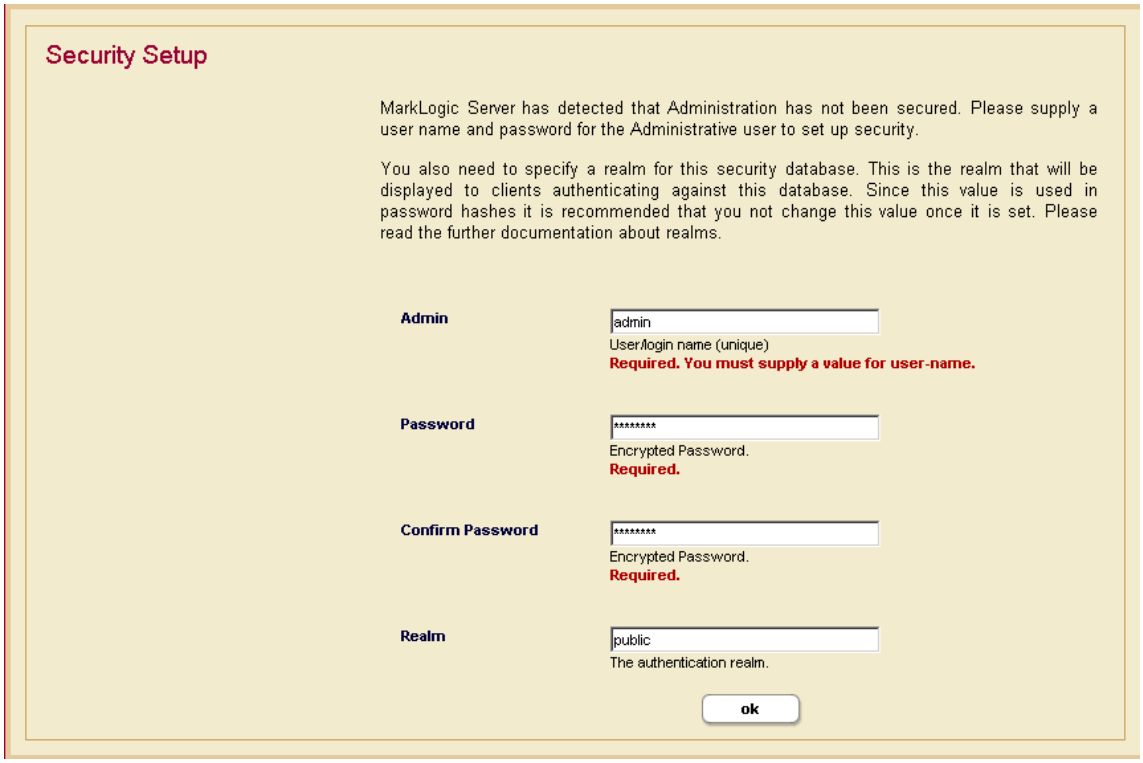
This section only applies if you are installing MarkLogic Server on this host for the first time. It does not apply if you are upgrading from a previous release of MarkLogic Server.

1. After you accept the license agreement, wait for the server to restart.
2. MarkLogic Server then needs to self-install the initial databases and applications. The Server Install page appears.



3. Click OK to continue.
4. Wait for the server to restart.
5. If you are using Enterprise Edition (in a single-node or a cluster configuration), skip to “Enterprise Edition: Configuring the First and Subsequent Hosts” on page 27.

6. If you are using Standard Edition, the server prompts you to create an admin user. Enter the login name and password for the admin user.



Note: If you plan on using the digest or digestbasic authentication scheme, decide on the realm you want to use now and enter it in the Realm field. Changing the realm later will invalidate all digest passwords in the security database. For more information on security realms, see *Understanding and Using Security Guide*.

7. Click OK to continue. This creates an admin user.
8. The server prompts you for a username and password; enter the admin username and password you just created.

After logging in with your admin username and password, the browser displays the Admin Interface. MarkLogic Server is now installed. To verify your installation, go to “Checking for the Correct Software Version” on page 32.

Note: The installation process also creates a second user named `nobody`. The `nobody` user that the installation process creates is assigned a randomly-generated password and is given no privileges. If you want to add privileges or change the password of the `nobody` user, use the Admin Interface to modify the user, as described in the *Administrator’s Guide*.

2.7 Enterprise Edition: Configuring the First and Subsequent Hosts

The following configuration procedures are for Enterprise Edition only, and are different depending on if you run MarkLogic Server in a cluster configuration or on a single host. The Enterprise Edition only procedures are as follows:

- Enterprise Edition: Configuring a Single Host or the First Host in a Cluster
- Enterprise Edition: Configuring an Additional Host in a Cluster
- Enterprise Edition: 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 2.7.1. Otherwise, follow the installation instructions in Section 2.7.2.

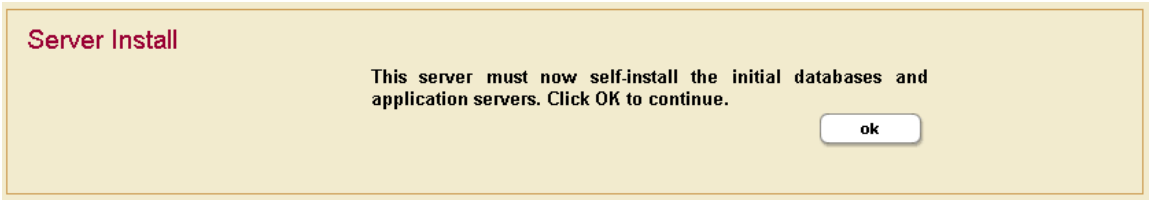
If you are upgrading a cluster to a new release, see Upgrading a Cluster to a New Maintenance Release of MarkLogic Server in the *Scalability, Availability, and Failover Guide*.

2.7.1 Enterprise Edition: Configuring a Single Host or the First Host in a Cluster

This section only applies to Enterprise Edition installations.

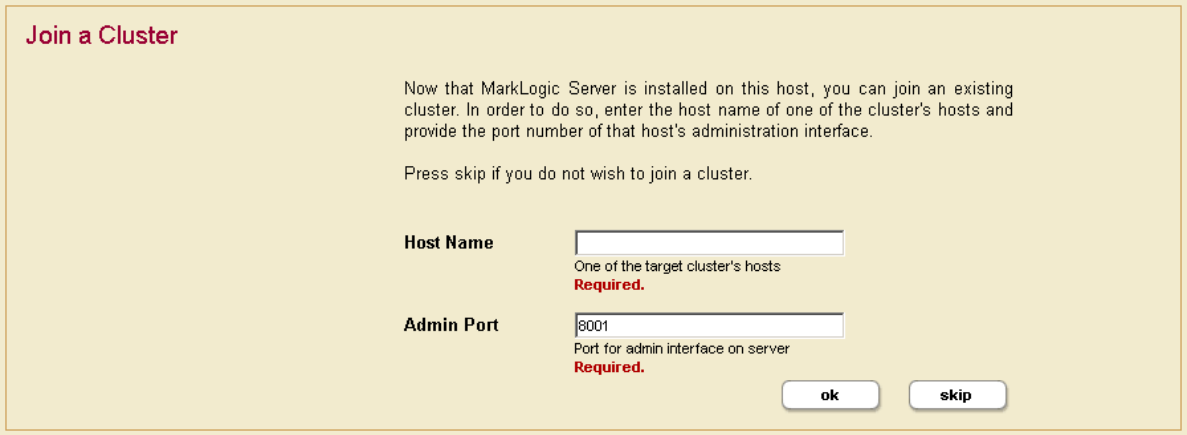
To configure this installation as a single host, or as the first host in a cluster, perform the following steps:

1. Install MarkLogic Server, start MarkLogic Server, and enter your license key, as described in “Installing MarkLogic Server” on page 18, “Starting MarkLogic Server” on page 21, “Entering the License Key and Accepting the License Agreement” on page 22.
2. After accepting the license agreement, MarkLogic Server restarts. Then MarkLogic Server needs to self-install the initial databases and applications. The Server Install page appears.



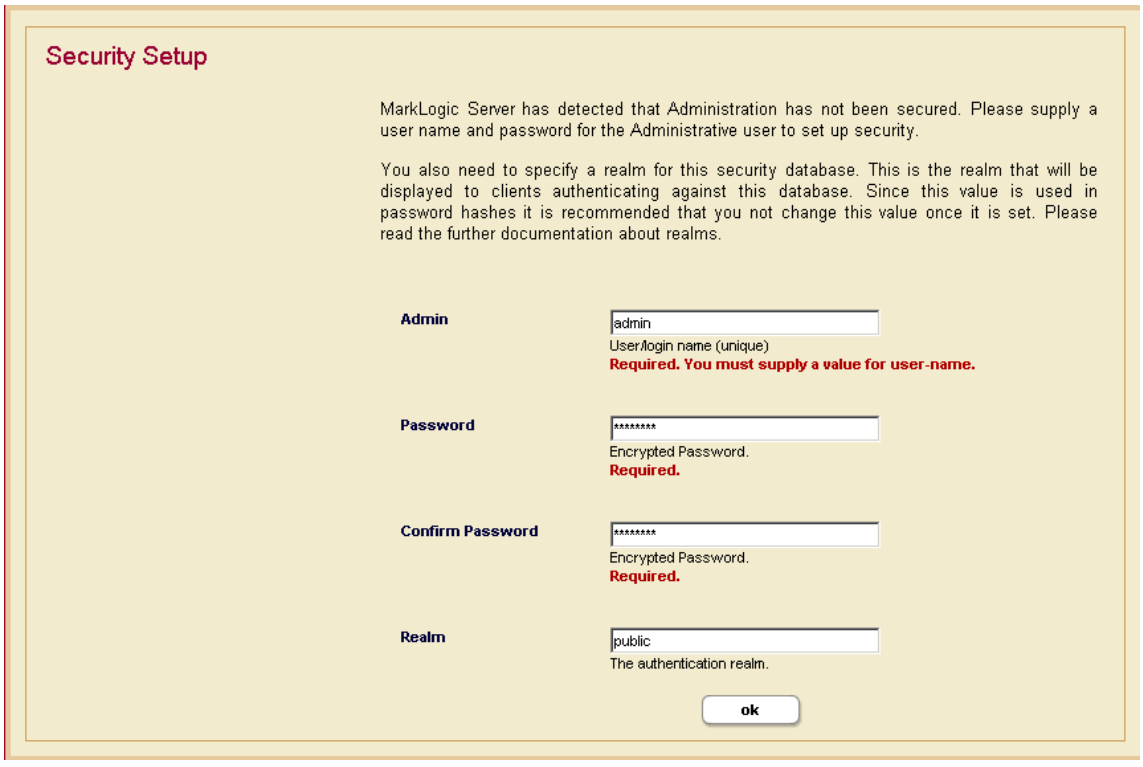
3. Click OK to continue.
4. Wait for the server to restart.

5. After the server restarts, you will be prompted to join a cluster.



6. Click Skip.

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



8. Click OK.

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

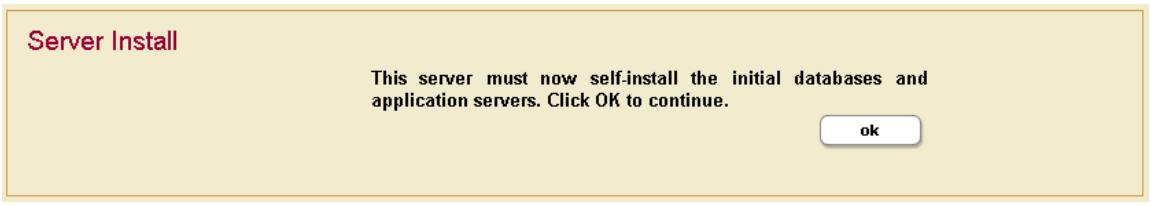
You will now see the Admin Interface. If you do not need to add any hosts at this time, skip to Section 2.8 on page 32.

2.7.2 Enterprise Edition: Configuring an Additional Host in a Cluster

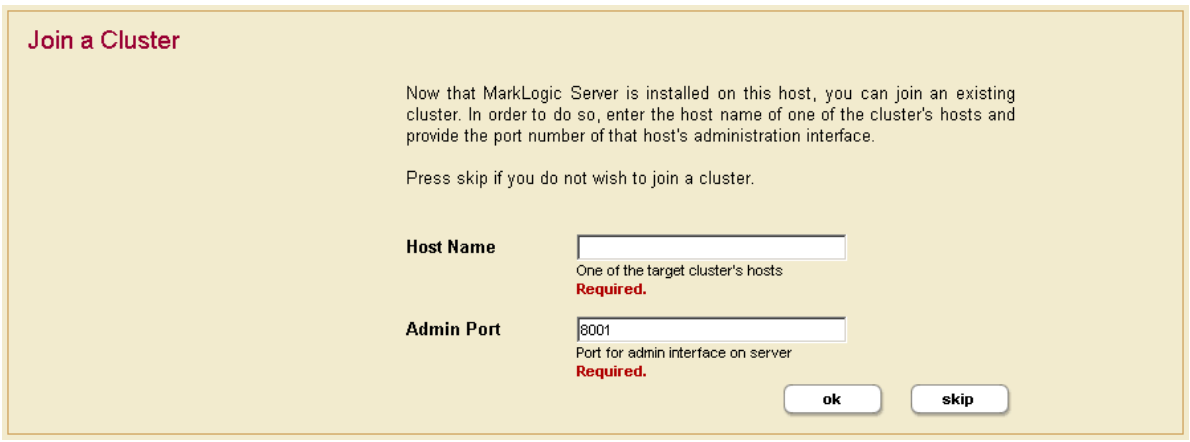
This section only applies to Enterprise Edition installations with two or more hosts.

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 Server, start MarkLogic Server, and enter your license key, as described in "Installing MarkLogic Server" on page 18, "Starting MarkLogic Server" on page 21, "Entering the License Key and Accepting the License Agreement" on page 22.
2. After accepting the license agreement, MarkLogic Server restarts. Then MarkLogic Server needs to self-install the initial databases and applications. The Server Install page appears.

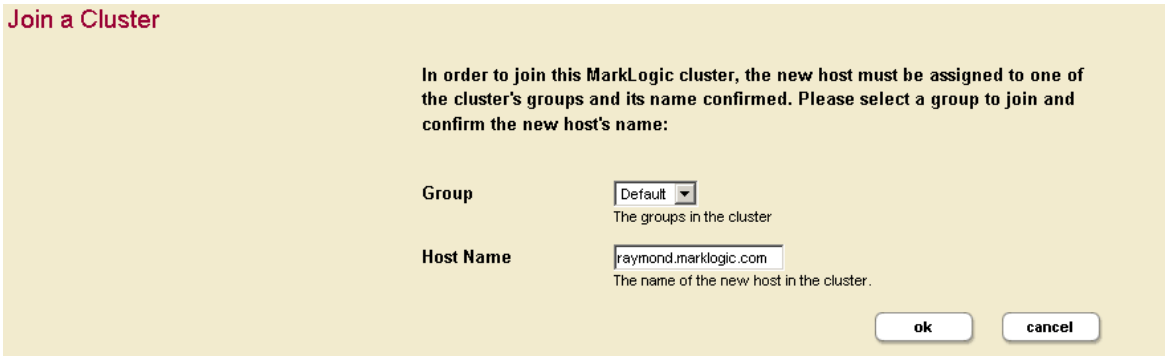


3. Click OK to continue.
4. Wait for the server to restart.
5. After the server restarts, you will be prompted to join a cluster.

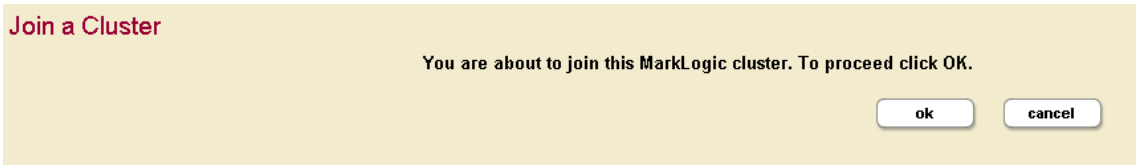


6. Enter the DNS name or the IP address of one of the machines in the cluster. For instance, if this is the second host you are installing, you can enter the DNS name of the first host you installed.
7. Click OK.
8. You will be prompted for an admin username and password. You can use the admin username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

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



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



11. You have now joined the cluster.



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.

2.7.3 Enterprise Edition: Leaving a Cluster and Becoming a Single Host

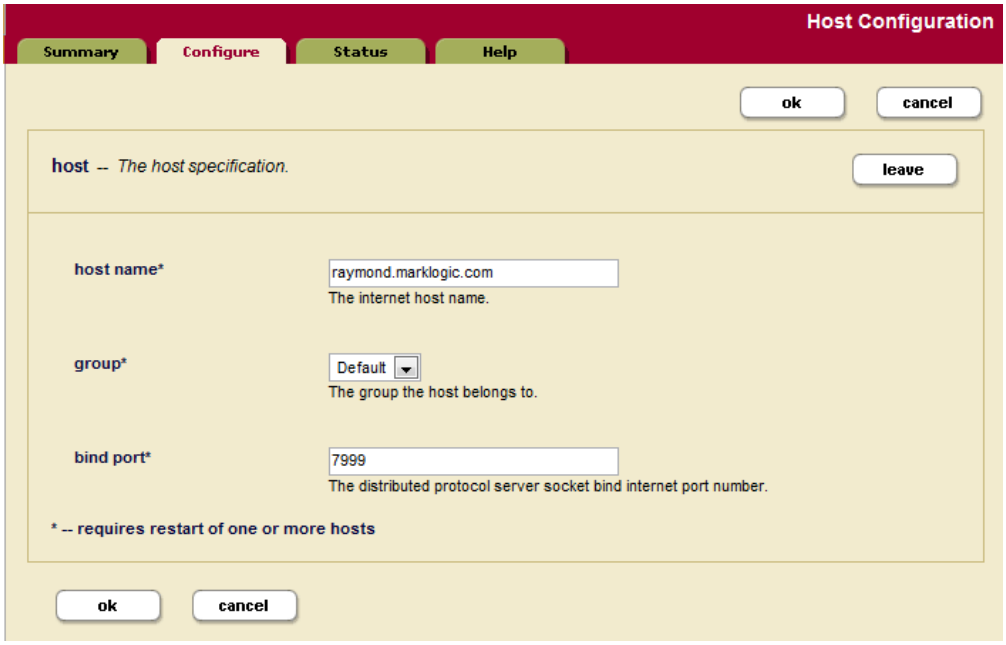
This section only applies to Enterprise Edition installations.

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:



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.

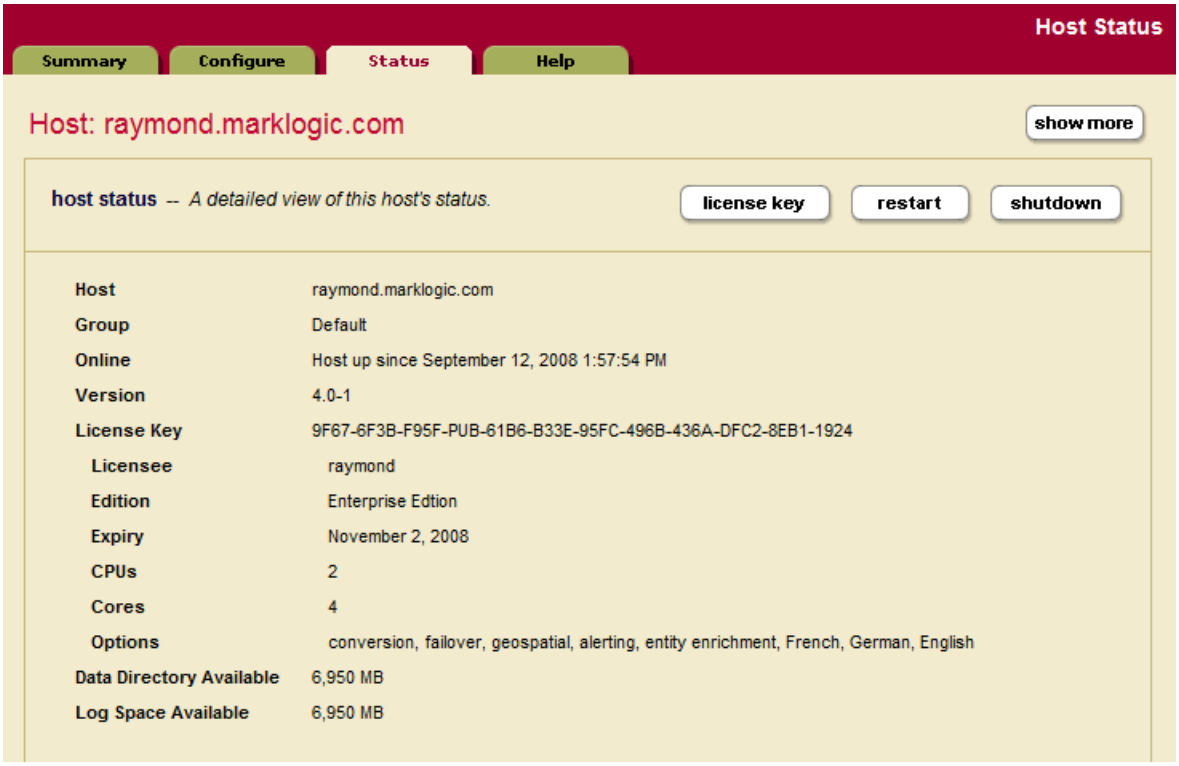
7. Follow the instructions in sections “Configuring a Single Host or the First Host in a Cluster” or “Configuring an Additional Host in a Cluster” as appropriate.

2.8 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.



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 Server on your system.

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

On UNIX-based systems (Linux and Solaris), MarkLogic Server 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 Server and for starting and stopping MarkLogic Server 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 Server, log in as the `root` user.
2. Make sure MarkLogic Server is stopped. If it is still running, stop it as follows:

Platform	Perform the following to stop MarkLogic Server:
Red Hat Linux	As the `root` user, enter the following command: `/etc/init.d/MarkLogic stop`
Sun Solaris	As the `root` user, enter the following command: `/etc/init.d/MarkLogic stop`

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

Platform	Configuration File to Edit
Red Hat Linux	`/etc/sysconfig/MarkLogic`
Sun Solaris	`/etc/MarkLogic.conf`

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/sysconfig/MarkLogic` or `/etc/MarkLogic.conf` file.

6. If you have not yet started MarkLogic Server after performing a clean installation (that is, after installing into a directory where MarkLogic Server has never been installed), then you are done and you can skip the rest of the steps in this procedure. If 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 Server 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 (for configuration and log files, and default forest directory)
Red Hat Linux	`/var/opt/MarkLogic`
Sun Solaris	`/var/opt/MARKlogic`

   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 Server as described in “Starting MarkLogic Server” on page 21.

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: The configuration changes you made to the startup scripts 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.

2.10 Removing MarkLogic Server

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

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

Platform	Perform the following:
Windows	Select Start > Programs > MarkLogic Server > Stop MarkLogic Server. **Note:** 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.
Red Hat Linux	As the `root` user, enter the following command: `/etc/init.d/MarkLogic stop`
Sun Solaris	As the `root` user, enter the following command: `/etc/init.d/MarkLogic stop`
Mac OS X	Select System Preferences > MarkLogic to open the MarkLogic control window. Click Stop MarkLogic Server.

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

Platform	Perform the following:
Windows	Use the Add/Remove Programs Control Panel to uninstall MarkLogic Server.
Red Hat Linux	As the `root` user, enter the following command: `rpm -e MarkLogic`
Sun Solaris	As the `root` user, enter the following command: `pkgrm MARKlogic`

Mac OS X	No action is necessary when upgrading.
	
	If you want to remove the user data and do a fresh install, then remove the following directory:
	
	`~/Library/Application Support/MarkLogic/Data`
	
	To entirely remove MarkLogic Server, remove the following directories:
	
	`~/Library/MarkLogic`
	`~/Library/Application Support/MarkLogic`
	`~/Library/StartupItems/MarkLogic`
	`~/Library/PreferencePanes/MarkLogic.prefPane`
	
	To make Mac OS X completely forget it ever had a MarkLogic installation, run the following command from a terminal window:
	
	`sudo pkgutil --forget com.marklogic.server`

Note: Using this procedure to remove MarkLogic Server 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 Technical Support

MarkLogic provides technical support according to the terms detailed in your Software License Agreement or End User License Agreement. For evaluation licenses, MarkLogic may provide support on an “as possible” basis.

For customers with a support contract, we invite you to visit our support website at http://support.marklogic.com to access information on known and fixed issues.

For complete product documentation, the latest product release downloads, and other useful information for developers, visit our developer site at http://developer.marklogic.com.

If you have questions or comments, you may contact MarkLogic Technical Support at the following email address:

support@marklogic.com

If reporting a query evaluation problem, please be sure to include the sample XQuery code.

Combined Product Notices

MarkLogic Server 6.0 and supporting products.
Last updated: August 19, 2013

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