

UPGRADER'S GUIDE

Software Version 3.6. Upgrader's Guide B3.

NexusTM

Secure iSeries-Hosted Web Portals & Enterprise Content Management

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About this Guide

This is the Nexus 3.6 Upgrader's Guide. This document includes instructions for upgrading your Nexus site(s) from version 3.0 or higher.



If you are currently running an earlier version of Nexus, please contact Technical Support for appropriate instructions.

These instructions are also [available online](#).

If you are installing Nexus for the first time, then please use the instructions in the Nexus User Guide, or [visit our website](#). In the user guide you will also find an overview of the product, extensive tutorial exercises to help you get started with the portal software as quickly as possible, and reference information for all the features of the portal.

Getting Help

If you have any questions about Nexus or the content of this guide, please call our Technical Support team at (250) 655-1766 [7:30-5:00 PST]. During our hours of operation your calls are answered immediately by a real, live person, who will help you immediately. You can also reach us by email at excel@excelsystems.com, or visit our website at www.bcdsoftware.com.

We are happy to answer questions of any kind.

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SECTION

I

Nexus Introduction and Upgrade Instructions

In this Section:

Chapter 1 - About Nexus 3.6

Chapter 2 - Upgrade and Configuration Instructions

About Nexus 3.6

Nexus 3.6 is an important new release of the software, with a number of significant new features. This release also includes a wide array of internal changes that reinforce the structure and security of the portal. While not immediately visible, these changes both make the portal more robust and set the stage for the more visible changes you will see in upcoming releases.

Here is a quick summary of the most important changes in this release:

1. Improved support of Firefox (and other browsers). This was the main focus of our work in this release, and it encompassed hundreds of changes to the tool.
2. Improved iSeries password handling, including the ability to change expired passwords when logging in and use of case sensitive passwords. These features were a priority to a large number of customers.
3. Improved page load speeds. Again, this was done through many, many changes to the tool across the board.
4. Full text indexing of ECM files via the Google Mini or Google Search Appliance. We initially added this feature at the behest of one of our clients, but have been impressed by its power. If you are interested in leveraging this feature, please contact us for more information.

Note that as of this release, Nexus also requires you to be at V5R3 or higher.

For more information, please [visit our web site](#). For an overview of all the features in Nexus, please refer to the User Guide.

Upgrade and Configuration Instructions

These instructions are for upgrading to Nexus 3.6 from Nexus 3.x only.

If you are upgrading from an earlier release of Nexus, please contact Technical Support for the instructions you need. If you are installing Nexus from scratch, please use the instructions in the User Guide.

Your Nexus 3 License Key

The installation prompts you for a Nexus license key. When upgrading the software from a previous release, you presumably have a valid license key, so can just press F3 at this screen to have the install retain your previous key, and move on with the upgrade.



Note that the license key is saved in your Nexus environment library, so if you install multiple instances of Nexus, you'll need to re-enter your license key for each installation.

If you do not have a license key please call BCD at (630) 986-0800 to request one. You can also email us at sales@bcdsoftware.com. While you can complete a new install without a license key, you do need to activate the product before you can use it.

What is Installed

These are the major Nexus components that will exist on your iSeries from your previous installations:

1. **Library XL_SMSLIB.** This is the Nexus product library. It contains all the programs, files and other objects needed to implement Nexus

portals. You can either upgrade this library, or install Nexus 3.6 to a new library.

2. **IFS Files and Subdirectories.** By default these files are created in the directory /esdi/nexus. They consist of HTML files, images, Cascading Style Sheets and other files used to define the look and feel of a site.

When you upgrade the software, you can overwrite these files, or install to a new directory.

3. **Library XL_WEBSPT.** This is the library containing the service programs required to run Nexus (and any WebSmart programs you use).

This library will be upgraded, and if you have multiple Nexus environments, they will all share the components here.

4. **The User Profile NEXUSADMIN.** This is used to protect access to the Nexus administration pages.

This profile is not touched during an upgrade.

5. **Apache HTTP Server Instance Configuration Files.** The default Apache HTTP server instance for Nexus is called `NXAPACHE`.

This HTTP server instance is not touched during an upgrade.

If you have any questions about any of these components or you need help with removing them when uninstalling the software, please contact our Technical Support team.

The upgrade instructions begin on the next page.

Step 1: Download and Transfer the Installation Files

The Nexus install should take about 5-10 minutes, depending on the model of your iSeries. Follow the instructions below:

1. Go to the **Free Trials & Downloads** link at www.bcdsoftware.com and fill out the form to download Nexus. Save the downloaded file to a new folder on your PC:

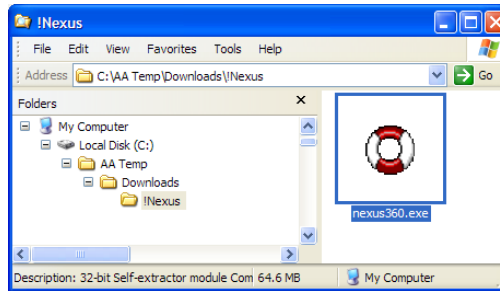


Figure 2-1. The downloaded Nexus install file, in a folder on your PC.

2. When the download completes double-click the file nexus360.exe to transfer the install library to your iSeries. After the file is unpacked, the FTP transfer utility is automatically presented:

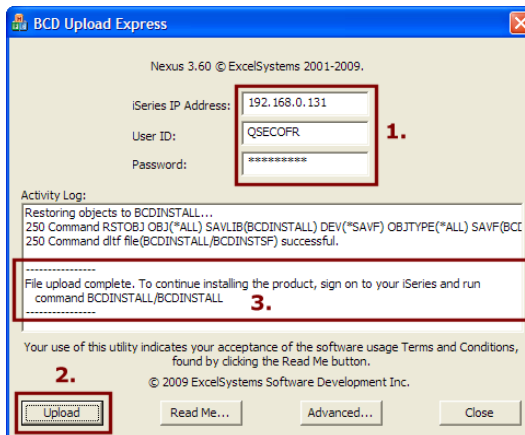


Figure 2-1. Uploading the iSeries installation libraries from your PC.

3. Enter your iSeries IP address and the QSECOFR password and click the Upload button. This step takes a few minutes to complete. When the upload finishes the activity log displays the message 'File upload complete'. Close the FTP utility and continue with the next step.

Step 2: End your Nexus Apache HTTP Server Instance

To avoid object locks on programs and files that need to be updated, you should end the Apache HTTP server instance used by Nexus.

After confirming that no one is currently using Nexus, run the following command to end the NXAPACHE HTTP server instance:

```
ENDTCPSVR SERVER (*HTTP) HTTPSVR (NXAPACHE)
```



You can also end the HTTP server instance from the online interface, at <http://youripaddress:2001/HTTPAdmin>. If you aren't sure what the server instance name is, this is a good way to do it.

From the Admin interface you need to select the Nexus Apache HTTP server name from the Server drop down list, then click the Stop button.

All the jobs should end within a few seconds.

To ensure that the upgrade proceeds as smoothly as possible, run the following command to check for object locks:

```
WRKOBJLCK OBJ (XL_SMSLIB) OBJTYPE (*LIB)
```



If your current Nexus environment is in a library other than `XL_SMSLIB`, then check locks on that library.

After verifying that all the object locks are removed, continue with the next step.

Step 3: Start the Installation

To begin the installation, log in to an iSeries session as QSECOFR and execute the command `BCDINSTALL/BCDINSTALL`.

The install will present a summary list of the installation steps:

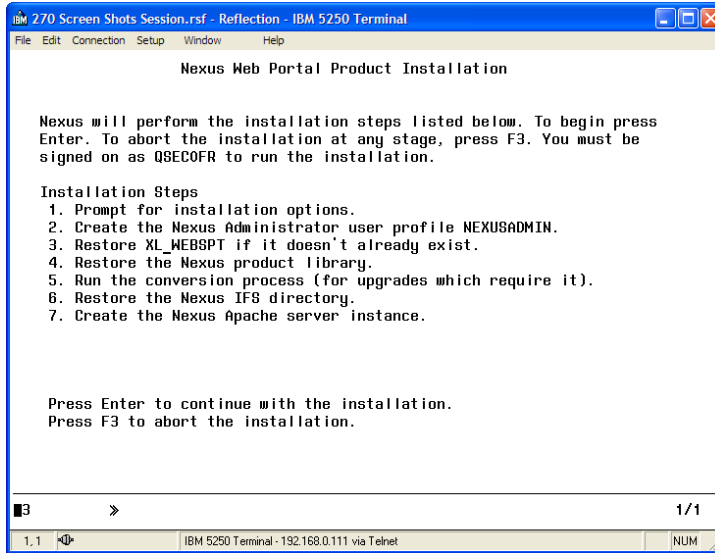


Figure 2-2. Overview of the installation steps.

Review the instructions and press Enter to continue.

Step 4: Choose the Library to Install To

As the first step of the actual install, you are prompted to enter the name of the library to install to:

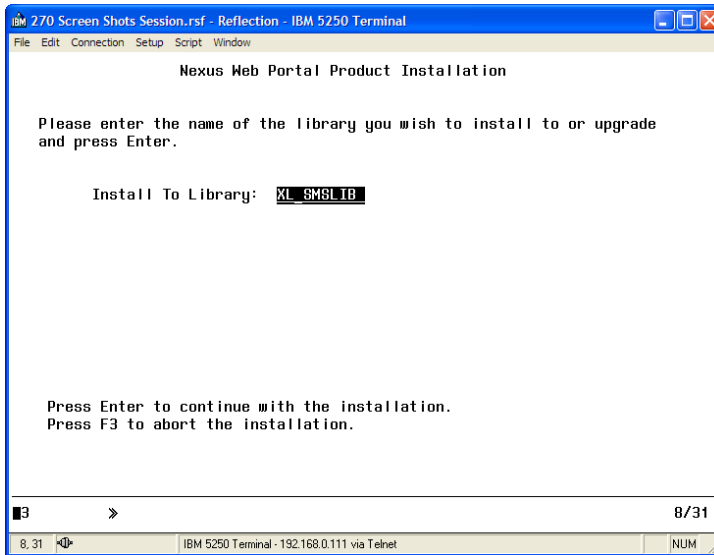


Figure 2-3. Selecting the library to install to.

The default library name is XL_SMSLIB. You have a couple of options here:

1. By entering the name of an existing Nexus library, you can upgrade that library to the current release.
2. By entering a new library name (a library that doesn't exist), you can create a completely new, separate Nexus environment.

These instructions will follow the first path, of upgrading an existing environment.

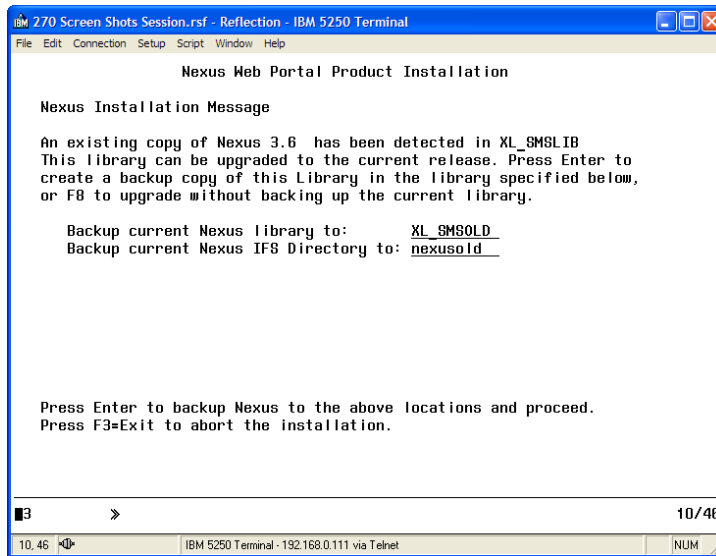


We have a Knowledge Base article at our web site that provides some guidance on how to clone existing sites as the starting point for creating new ones.

To upgrade your existing library, type your existing Nexus library name in the space above and press Enter.

Step 5: Creating a Backup of your Previous Nexus Environment

When you specify an existing Nexus library as your target installation library, Nexus will detect this and present the panel below:



```
IBM 270 Screen Shots Session.rsf - Reflection - IBM 5250 Terminal
File Edit Connection Setup Script Window Help

Nexus Web Portal Product Installation

Nexus Installation Message

An existing copy of Nexus 3.6 has been detected in XL_SMSLIB
This library can be upgraded to the current release. Press Enter to
create a backup copy of this Library in the library specified below,
or F8 to upgrade without backing up the current library.

Backup current Nexus library to:      XL_SMSOLD
Backup current Nexus IFS Directory to: nexusold

Press Enter to backup Nexus to the above locations and proceed.
Press F3=Exit to abort the installation.

3 > 10/46
10.46 IBM 5250 Terminal - 192.168.0.111 via Telnet NUM
```

Figure 2-4. Select a library to back up your existing Nexus installation to.

Type backup library and IFS directory names. The default values are `XL_SMSOLD` and `nexusold`, respectively.



The library and IFS directories you specify here need to NOT exist. Do not specify an existing library or directory.

Then press Enter to continue.

Step 6: Final Steps

As the next step, the install will prompt you to enter your license key at the screen below:

```
IBM 270 Screen Shots Session.rsf - Reflection - IBM 5250 Terminal
File Edit Connection Setup Script Window Help

Welcome to:
Nexus
Exclusive Distribution Rights
Business Computer Design
950 York Road
Hinsdale IL 60521 U.S.A.
(630) 986-0800 or sales@bcdsoftware.com
Rel: 3.60
(c) 2007 ESDI

Serial #: 10D7FAD          Product Installation
Model : 520
Proc # : 8325
Note: If you are upgrading, press F3 to retain your existing code.

Trial period security code . . . . . Code
Permanent installation security code . . . . . Code

(License keys are available from BCD or your local distributor)

F3=Exit

17,54 17/54
IBM 5250 Terminal - 192.168.0.111 via Telnet NUM
```

Figure 2-5. Nexus license key installation prompt.

If you are upgrading an existing site and have a valid key, press F3 on this screen to exit and finish the install.

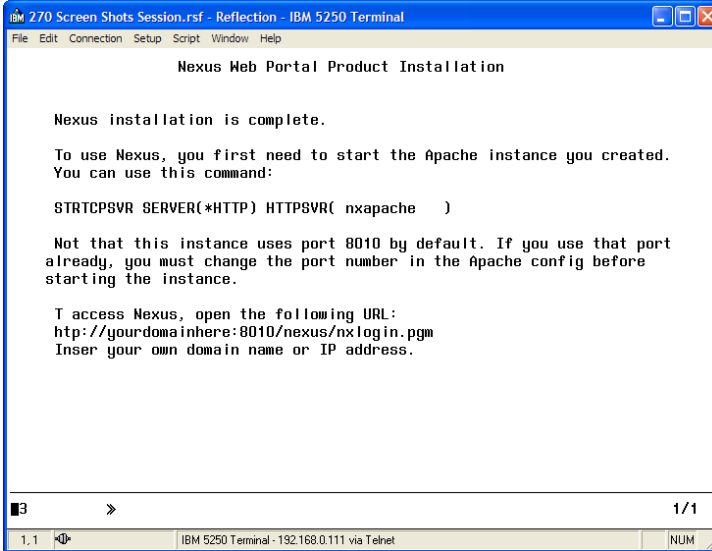


If you have moved Nexus to a new box, and just upgraded it there and need a valid license key contact BCD at (630) 986-0800 to request one. The key can be entered after the upgrade process so still press F3 to finish this step.

This step may take a minute as the IFS directories are created and populated.

Step 7: Starting the HTTP Server Instance

After the product libraries and IFS files have been restored you need to start the Nexus Apache HTTP server instance:



```
IBM 270 Screen Shots Session.rsf - Reflection - IBM 5250 Terminal
File Edit Connection Setup Script Window Help

Nexus Web Portal Product Installation

Nexus installation is complete.

To use Nexus, you first need to start the Apache instance you created.
You can use this command:

STRTCPSVR SERVER(*HTTP) HTTPSVR( nxapache  )

Not that this instance uses port 8010 by default. If you use that port
already, you must change the port number in the Apache config before
starting the instance.

T access Nexus, open the following URL:
http://yourdomainhere:8010/nexus/nxlogin.pgm
Insert your own domain name or IP address.

1.1 <Q> IBM 5250 Terminal - 192.168.0.111 via Telnet NUM
```

Figure 2-6. Concluding the installation, and further instructions.

Press Enter at the screen above to finish the install.

Then, at an iSeries command line, run this command:

```
STRTCPSVR SERVER(*HTTP) HTTPSVR(NXAPACHE)
```



Note that this instance uses port 8010 by default. If you are using that port already, you must change the port number in the Nexus Apache instance configuration before starting it.

When you complete these steps, continue with the instructions below.

Step 8: Verifying your Nexus Install

To verify that Nexus is installed and the NXAPACHE HTTP server instance is running, go to this URL:

```
http://yourdomainhere:8010/nexuspublic/nxlogin.pgm
```

Insert your iSeries domain name or IP address into this address.



The URL you type in will be similar to one of these:

```
http://192.168.0.100:8010/nexuspublic/nxlogin.pgm
```

```
http://local.mycompany.com:8010/nexuspublic/nxlogin.pgm
```

```
http://www.mycompany.com:8010/nexuspublic/nxlogin.pgm
```

If you are uncertain of what URL or domain to use, consult your system administrator.

This URL should take you to the Nexus login page, shown here:

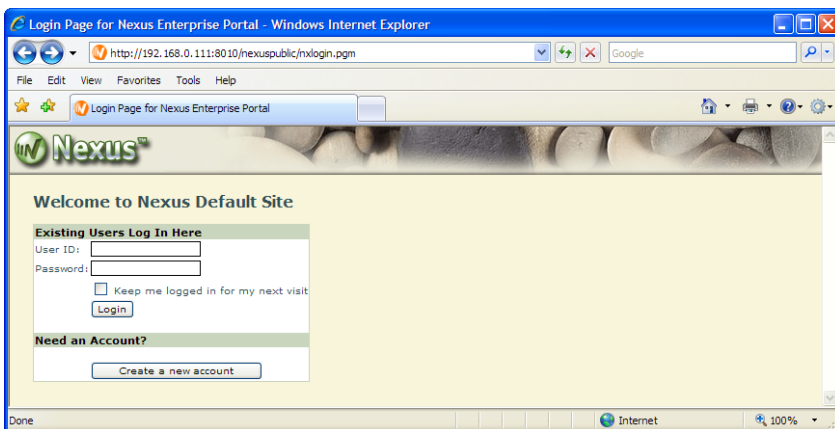


Figure 2-7. The prompt for logging into a Nexus site using the default configuration.

You can try logging in using your 'nexusadmin' profile.



If you have any trouble with these steps, please contact Technical Support to get some help. Our support team is available from 7:30 AM to 5:00 PM PST. During those hours the phone is picked up by a human being who can help you immediately. You can also email us at excel@excelsystems.com, and we can respond by email or give you a call back.

The next section includes some troubleshooting suggestions you can try.

Step 9: Post-Upgrade Review

When we released the preliminary versions of Nexus 3.6 a few of our customers ran into the issues described below. After upgrading you can review your new library to check whether you are getting any of the symptoms described, and then follow the instructions to correct them.

My ECM Skins Look Wrong

In Nexus 3.6 we've revised the automatically generated folder HTML to allow greater flexibility and control of that content. On an upgrade, we don't replace the ECM document skins in case they've been changed by the user.

To update the skins, copy the following directory:

```
*installpath*/Master_Set/ECM/
```

to

```
*installpath*/*sitepath*/ECM/
```

My Custom Skins are not Displaying as I Expect

Our stylesheet structure has necessarily changed with Nexus 3.6, which requires custom stylesheets to be regenerated with the new structure.

In most cases, you can correct your custom skins by opening your custom skin via the Site Management area, clicking on the option to change that skin, and in there clicking the Apply button. This should correct any issues you have with colors.



If the above steps don't work for you, you may need to go directly to the program at /*siteprivatepath*/nxskins.pgm to update your skin.

If you see any white space below your header, or don't see the full header, you can correct this by adjusting the header height (the total height of the user header and the link area below it) and the banner height (the link area containing ecm search and breadcrumbs).

Implementing Custom User Headers

In earlier versions of Nexus your custom headers were contained in iframes, and the header was a full separate page. For a number of reasons (performance being a primary one), Nexus 3.6 and higher implements your custom headers as HTML fragments included inline. Existing headers might need some changes to correct their display.

For example, here could be an old format header:

```
<html>
<head>
<link rel="stylesheet" type="text/css" src="/nexuspublic/
customsrheader.css">
</head>
<body>

</body>
</html>
```

We now recommend using a format like this:

```
<div id="userheader" style="height: 70px; width: 100%;
background-color: lightblue;">

</div>
```

If you have any questions about these changes, please don't hesitate to contact Technical Support.

Troubleshooting Suggestions

After completing the upgrade, you should be able to load the Nexus login page at this URL:

```
http://yourdomainhere:8010/nexuspublic/nxlogin.pgm
```

You need to insert your own domain or iSeries IP address before the port number (leave the colon there though). If this page doesn't load correctly or at all, it's usually for one of the reasons described below.

Clear your Cache.

If your Nexus site loads, but the page layout is wrong or looks odd, your browser has probably cached one or more of the CSS, JavaScript & image files used by the tool. Clear your browser's cached files to address this problem.

Unfortunately, there isn't a way for Nexus to automatically override these browser settings.

Confirm that the URL you entered is correct.

In your browser verify that you are entering the right IP address for your iSeries, and that the correct port number is appended to it. If you aren't absolutely certain of these values, talk to your network administrator, or call Technical Support.

You can check your IP address by executing the command `CFGTCP` on your iSeries, and then selecting option 10.

The default `NXAPACHE` configuration is set to run on port 8010. The installation instructions in the User Guide include instructions on how to change your Apache HTTP server instance.

Verify that the NXAPACHE HTTP server instance is up and running.

As part of the install you started the HTTP server instance named `NXAPACHE`. To verify that this server instance is running, at an iSeries command line execute the `WRKACTJOB` command. You should see several jobs named `NXAPACHE` in the `QHTTPSVR` subsystem.

If the `NXAPACHE` server instance isn't running, you can attempt to start it with the command `STRTCPSVR SERVER(*HTTP) HTTPSVR(NXAPACHE)`.

To work with the `NXAPACHE` HTTP Server configuration use IBM's Web Administration for iSeries pages. You can access this interface from your browser, at the following URL:

```
http://yourdomainhere:2001/HTTPAdmin
```

Again, insert your own iSeries domain or IP address. When prompted, log in using your iSeries user profile.

The tab for managing your HTTP Servers includes a list of your HTTP servers in a dropdown box. In the list you should see an entry for `NXAPACHE`. Select this entry. When you do so, the area at the top left of your page should look like this:

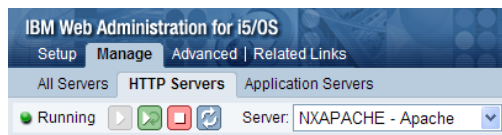


Figure 2-8. Confirming that the `NXAPACHE` HTTP server instance is running.

If the server isn't running (i.e. it shows with a status of 'Stopped'), you can click the green button to start the server instance. The status should change from 'Stopped' to 'Running'.

Check that the NXAPACHE HTTP Server Instance is Correctly Configured

This should only be a problem if someone else installed the software and manually edited the configuration files after installing. If you do want to check this, use the instructions at the end of the installation instructions in the User Guide. If you don't see any obvious configuration problems, call our Technical Support for assistance.

When checking your HTTP Server configuration, the first thing to check is whether the port number was changed by someone else after the install. If that's the case, then you need to change the port number in the URL.

Is the User Profile QTMHHTP1 enabled?

Use the command below to verify that the user profile QTMPHTP1 is enabled:

```
DSPUSRPRF USRPRF(QTMHHTP1)
```

When you use the `WRKACTJOB` command to check the server jobs, they appear to be running with a user profile of `QTMHHTPE`. However, if the job is running a CGI program, the user profile `QTMHHTP1` is also involved. Sometimes administrators disable this profile to ensure no CGI programs are run on the system.

Confirm that the login program exists.

You can easily confirm that the login program actually exists by executing this command at an iSeries command line:

```
WRKOBJ OBJ(XL_SMSLIB/NXLOGIN) OBJTYPE(*PGM)
```

If the program isn't found, your install failed for some reason. Contact Technical Support for assistance.