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GemStone®

# ***GemStone/S Installation Guide***

*for AIX on IBM RS/6000*

*February 28, 2002*

***GemStone/S***

Version 6.0

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Part No. 207-110-6.0-0-0-0

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This document explains how to install GemStone/S version 6.0, and how to upgrade from previous GemStone releases. For information regarding new and modified features in this release of GemStone/S, please refer to the *GemStone/S Release Notes*.

## Typographical Conventions

This document uses the following typographical conventions:

- Operating system and Topaz commands are shown in **bold** typeface. For example:

**copydbf**

- Smalltalk methods, GemStone environment variables, operating system file names and paths, listings, and prompts are shown in monospace typeface. For example:

markForCollection

- Place holders that are meant to be replaced with real values are shown in *italic* typeface. For example:

*StoneName.conf*

In formal syntax listings, these additional conventions are used:

- Literals are shown in **bold** typeface. For example:

**tcp**

- Optional arguments and terms are enclosed in square brackets. For example:

*[dbfName]*

- Braces { } mean 0 or more modifiers. For example:

*{modifier}*

In this example you may list as many modifiers as you wish, but they are not required.

- Alternative arguments and terms are separated by a vertical bar (pipe). For example:

*gemStoneName | netLdiName*

In this example you must specify one name, but not both.

## Technical Support

GemStone/S provides several sources for product information and support. GemStone/S product manuals provide extensive documentation, and should always be your first source of information. GemStone/S Technical Support engineers will refer you to these documents when applicable. However, you may need to contact Technical Support for the following reasons:

- Your technical question is not answered in the documentation.
- You receive an error message that directs you to contact GemStone/S Technical Support.
- You want to report a bug.
- You want to submit a feature request.

Questions concerning product availability, pricing, keyfiles, or future features should be directed to your GemStone/S account manager.

When contacting GemStone/S Technical Support, please be prepared to provide the following information:

- Your name, company name, and GemStone/S license number,
- the GemStone/S product and version you are using,
- the hardware platform and operating system you are using,
- a description of the problem or request,
- exact error message(s) received, if any.

Your GemStone/S support agreement may identify specific individuals who are responsible for submitting all support requests to GemStone. If so, please submit your information through those individuals. All responses will be sent to authorized contacts only.

For non-emergency requests, you should contact Technical Support by web form, email, or facsimile. You will receive confirmation of your request, and a request assignment number for tracking. Replies will be sent by email whenever possible, regardless of how they were received.

**World Wide Web:**     **<http://support.gemstone.com>**

The preferred method of contact. The Help Request link is at the top right corner of the home page—please use this to submit help requests. This form requires a password, which is free of charge but must be requested by completing the Registration Form, found in the same location. You'll be able to access the site as soon as you submit the web form.

**Email: support@gemstone.com**

Please do not send files larger than 100K (for example, core dumps) to this address. A special address for large files will be provided on request.

**Facsimile: (503) 629-8556**

When you send a fax to Technical Support, you should also leave a voicemail message to make sure your fax will be picked up as soon as possible.

We recommend you use telephone contact only for more serious requests that require immediate evaluation, such as a production database that is non-operational.

**Telephone: (800) 243-4772 or (503) 533-3503**

Emergency requests will be handled by the first available engineer. If you are reporting an emergency and you receive a recorded message, do not use the voicemail option. Transfer your call to the operator, who will take a message and immediately contact an engineer.

Non-emergency requests received by telephone will be placed in the normal support queue for evaluation and response.

## **24x7 Emergency Technical Support**

GemStone/S offers, at an additional charge, 24x7 emergency technical support. This support entitles customers to contact us 24 hours a day, 7 days a week, 365 days a year, if they encounter problems that cause their production application to go down, or that have the potential to bring their production application down. Contact your GemStone/S account manager for more details.

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# *Installing GemStone/S Version 6.0*

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This chapter describes the procedure for installing GemStone version 6.0 on a single machine. If you have enough disk space on a single machine, we recommend that you set up GemStone this way initially to ensure that all the pieces work together. At the end of this chapter, we suggest refinements you might want to make, such as relocating the repository files or running GemStone in a network configuration.

Adjust the installation to meet your specific needs. The topic “What Next?” on page 1-16 provides references to procedures and related information in the *GemStone System Administration Guide*.

Installation instructions and system requirements for other system components, such as GemBuilder for Smalltalk, are provided separately with their respective products.

*NOTE*

*Before installing GemStone 6.0, you may want to install GemBuilder for Smalltalk 5.2 (GBS) to take advantage of its new features with your existing GemStone server. Later, you can configure GBS to work with GemStone 6.0 by following the steps in Chapter 3.*

## Review the Installation Procedure

The following list summarizes the steps to install GemStone.

- Check the System Requirements ..... 1-1
- Prepare for Installation ..... 1-4
- Set the Environment ..... 1-7
- Create the GemStone Key File ..... 1-8
- Verify TCP/IP ..... 1-8
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- Run the Installation Script ..... 1-9
- Change System Passwords and Add Users ..... 1-13
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## Check the System Requirements

Before you install GemStone, ensure that the following system requirements are satisfied. Systems meeting these requirements are suitable for installing GemStone and beginning development, but additional system resources may be necessary to support large applications.

### Platform

- IBM RS/6000 workstation (this release is intended for the pSeries).

### RAM

- At least 128 MB (256 MB recommended)
- 3 MB for each Gem session process beyond the first two

### Page space

- At least 128 MB of page space beyond other system needs (512 MB recommended). In general, your total page space should be at least twice the RAM installed.

### Disk Space

- Space for the installed distribution files—you need approximately 45 MB for GemStone, and additional space for each product listed on the label of your distribution media.

- 
- 
- Additional disk space as required for your repository.
  - The repository files should be located on a disk drive that does not contain page space. Use of multiple disk drives is advisable for servers.

#### **Media drive**

- CD-ROM drive

#### **Operating system**

- AIX version 4.3.3.0-08
- Asynchronous I/O (AIO) in the kernel.

To ensure that AIO is enabled:

- a. Invoke **smit**, and select **Devices**, then select **Asynchronous I/O**.
- b. If you want to place GemStone transaction logs on more than one disk drive (spindle), select **Maximum number of servers**, and specify the value as at least 10 times the number of spindles to be used for transaction logs.

GemStone uses asynchronous I/O for accessing transaction logs. Because each AIO request is handled by a separate kernel server process, this setting increases performance when transaction logs are located on more than one drive.

- c. Select **Change/Show Characteristics of Asynchronous I/O**.
- d. Select **STATE to be configured at system restart**, choose “available,” and press Enter.

The system should respond `aio0 changed`.

- e. Select **Configure Defined Asynchronous I/O**, and press Enter.

The system should respond `aio0 available`.

- f. Exit **smit**, and reboot the system.

- g. After rebooting, ensure that the AIO device driver is available:

```
% lsdev -C
```

You should see the message `aio0 Available`.

- To use extents in the file system larger than 2 GB or to increase the number of file descriptors available, make these changes in `/etc/security/limits`:

```
Fsize = -1  
nofiles = 2000
```



You must also have the Large File System enabled when creating a jfs file system using **smit**.

We recommend that you pregrow such extents to a size greater than 2 GB so any configuration difficulty is detected when the server is first started.

The default file descriptor limit of 1024 is adequate for up to about 500 GemStone users. Each user session requires two file descriptors, and others are needed for extents, transaction logs, and overhead. *Use caution and increase the default setting only when necessary because doing so can have system side effects.*

### System Clock

- The system clock must be set to the correct time. When GemStone opens the repository at startup, it compares the current system time with the recorded checkpoint times as part of a consistency check. A system time earlier than the time at which the last checkpoint was written may be taken as an indication of corrupted data and prevent GemStone from starting. The time comparisons use GMT.

### TCP Keepalive Option:

- GemStone processes ordinarily use the TCP *keepalive* option to determine how long they will wait after communications activity ceases unexpectedly. This setting can be useful for reaping stale RPC Gems, but the operating system default may not be appropriate for this purpose. For further information, refer to your operating system documentation.

### C Compiler

- GNU compiler gcc-2.95.3

GemStone requires a C compiler only for development work, not for execution. The compiler is required only if you are developing C code for user actions or for a C application.

GemBuilder for Smalltalk may require a C compiler under additional circumstances. Please consult your *GemBuilder Release Notes* for details.

## Prepare for Installation

Perform the following steps to prepare the machine to receive the GemStone software. Although most steps require root login, we recommend that you perform the initial step as the GemStone administrator.

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*NOTE*

*For the rest of this document, the installation directory is referred to as InstallDir, which is \$GEMSTONE.*

Table 1.1 shows the portions of the system that are affected by the installation of GemStone.

**Table 1.1 Parts of System Affected by GemStone Installation**

Location	Use
/dev/rdisk/	Optional raw partitions for repository extents and transaction logs
/etc/services	Internet services database
/InstallDir/GemStone6.0-RISC6000.AIX Location of the object server software	
/opt/gemstone	Default location for server lock files and log files for GemStone network servers (NetLDIs)
/usr/gemstone	Alternative location for lock and log files, for compatibility with previous releases; /opt/gemstone is created unless /usr/gemstone already exists

1. As the GemStone administrator log in to a machine with adequate resources to run GemStone and that owns the disk on which you are going to install the GemStone files.

*NOTE*

*Do not copy the files as root, because the ownerships that were in effect when the distribution media was created are maintained, which might result in file permission errors for users at your site.*

2. Determine that adequate page space is available.

We recommend that you allow at least 10 LPs of page for running GemStone and an additional 10 LPs if you will be developing GemStone applications.

To determine the current size of the paging device(s), which is usually found on the root volume group, rootvg:

```
% /etc/lsvg rootvg -l
```

Paging devices are of TYPE paging, and the LPs column shows the size of each device. An LP is 4 MB.

Page space can be expanded dynamically (without rebooting) using SMIT.

3. Check the free disk space and determine the disk drive and partition on which you will install the GemStone software.

To list all disk partitions, along with the amount of free space in each partition:

```
% df -k
```

We recommend that you avoid choosing either an NFS-mounted partition or one containing UNIX page space for the initial installation. Mounted partitions can result in executables running on the wrong machine and in file permission problems. Existence of page space on the same drive can dramatically slow GemStone disk accesses.

4. Select an installation directory, *InstallDir*, and make this directory the current working directory. For example,

```
% mkdir InstallDir
% cd InstallDir
```

5. To extract the GemStone files, first insert the GemStone CD-ROM into the drive and mount it. (See your system administrator for details on how to do this.) Then unzip the files. For example:

```
% unzip /mount_point/gemstone/aix.zip
```

where *mount\_point* is the mount point for the CD-ROM drive.

The *InstallDir* now contains a GemStone directory with a name similar to **GemStone6.0-RISC6000.AIX**. (The version number may have additional digits.)

In addition to several subdirectories, the GemStone directory also contains two text files: `PACKING`, which lists all of the GemStone files, and `version.txt`, which identifies this particular release of GemStone.

6. Log in as root.

#### NOTE

*Although you can complete the installation as a non-root user, we do not recommend this. During installation, GemStone system security is established through file permissions and process attributes. To ensure that the installation is successful, you must install as root. If you later decide to change the security of your GemStone system, see Chapter 1 of*

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*the GemStone System Administration Guide, which explains the concept of GemStone server file permissions and how to change them.*

## Set the Environment

Perform the following steps to properly configure the operating environment.

1. Set the environment variable GEMSTONE.
  - a. If more than one version of GemStone resides on this machine, check for existing GemStone environment variables:

```
% env | grep GEM
```

All GemStone environment variables are displayed.

- b. If any environment variables exist, you must specifically unset each one.

C shell:

```
% unsetenv GEMSTONE GEMSTONE_SYS_CONF \  
GEMSTONE_EXE_CONF GEMSTONE_LOG GEMSTONE_LANG LANG
```

Bourne or Korn shell:

```
$ unset GEMSTONE GEMSTONE_SYS_CONF GEMSTONE_EXE_CONF \  
GEMSTONE_LOG GEMSTONE_LANG LANG
```

- c. Set the environment variable GEMSTONE to the *full pathname* (starting with a slash) of your new GemStone installation directory.

C shell:

```
% setenv GEMSTONE InstallDir/GemStone6.0-RISC6000.AIX
```

Bourne or Korn shell:

```
$ GEMSTONE=InstallDir/GemStone6.0-RISC6000.AIX
```

```
$ export GEMSTONE
```



## Create the GemStone Key File

To run GemStone, you must create a key file. Instructions and information to create this file were shipped with the distribution media. If either of these materials is missing, call GemStone Contract Administration.

1. Change the permissions on the directory `$GEMSTONE/sys` so that you can create the file:

```
% cd $GEMSTONE/sys
% chmod 755 .
```

2. Using a text editor and the information provided, create the key file `$GEMSTONE/sys/gemstone.key`.

3. Change the file and directory permissions so that they are no longer writable:

```
% chmod 555 gemstone.key
% chmod 555 .
```

## Verify TCP/IP

To run GemStone, TCP/IP must be functioning, even if your machine is not connected to a network.

1. Verify that TCP/IP networking software is functioning (1 is the number 1):

```
% /etc/ping hostname 8 1
```

where *hostname* is the name of your machine. If **ping** responds with statistics, TCP/IP is functioning.

## Define the NetLDI Service

The `netldi60` service must be defined in your TCP/IP network database.

*NOTE*

*You might need the help of your UNIX system administrator to complete this procedure.*

1. Determine whether the `netldi60` service is already defined:

```
% ypcat services | grep netldi
```

---

---

If it is defined, skip the rest of this procedure and continue with the installation at “Run the Installation Script” on page 1-9.

If it is not defined, continue performing this procedure.

2. Determine which TCP/IP network database (local or NIS) is in use:

```
% ypwhich
```

If the program is missing or you see an error message when you run it, you can assume that your machine is using a local copy of the TCP/IP network database instead of a copy provided by NIS. Perform the following step on your local copy of the network database (the file `/etc/services`).

If NIS is running, have your UNIX system administrator perform the following steps.

3. Add an entry similar to the following to the network database:

```
netldi60 10088/tcp #GemStone 6.0
```

Choose a port number that is not being used by another service. The port number must be either less than 1024 (in which case `netldi` must be owned by root) or greater than 5000.

*NOTE*

*If you are upgrading from a previous version, you might need to keep the NetLDI for that version running. Assign a different port number to netldi60.*

4. If NIS is running, propagate the change to the network database to the rest of the network.
5. If NIS is not running, but several machines will be running GemStone, have the UNIX system administrator update the network database for each machine.

## Run the Installation Script

6. Invoke the installation script from the `install` subdirectory:

```
% cd $GEMSTONE/install
```

```
% ./installgs
```

`installgs` is an interactive script that analyzes your system configuration and makes suggestions to guide you through installing GemStone on your machine.

**NOTE**

*You can usually terminate execution of the installation script with Ctrl-C without risk to your files. When it is not safe to do so, the message Please do not interrupt appears on the screen. If this happens, wait for the message now it is OK to interrupt before you interrupt the script. You can run the script again from the beginning as many times as necessary.*

## Decisions to Make During Installation

During installation, you are asked several questions. The entire installation dialog is not reproduced here, but the main points are addressed. Some questions may not be asked, depending on answers to previous questions.

Whenever you are asked to answer “yes” or “no,” answer with **y** or **n**. When the script offers a default answer in square brackets (such as “[y]”), press Enter to accept the default.

### Verify the Release Tree?

Do you want the installation script to verify your GemStone release tree?

This process takes a few minutes, but it’s a good idea to ensure that the files were transferred from your distribution media without error.

Default: Verify the installation tree.

The GemStone installer will attempt to verify some system requirements on your system. Some of the verifications may issue warnings of the form:

```
./installgs[52]: test: Specify a parameter with this command.  
./installgs[52]: -q: not found.  
./installgs[260]: test: Specify a parameter with this command.
```

Unless an explicit installation failure is returned, the installation will complete successfully, and the above warnings may be ignored.

### Do you want the installation script to set up directories for server lock files and NetLDI logs?

The default location for server lock files and NetLDI log files is `/opt/gemstone`, although for compatibility with earlier releases `/usr/gemstone` is used only if it exists. If neither directory exists, the installation script offers to create `/opt/gemstone` and the subdirectories `locks` and `log`. Then, the script offers to grant world access (777) to these directories.

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If you answer **no** to creating the directories, you must create them (or provide a symbolic link) before starting the server.

### **Do you want the installation script to set the owner and group for all the files in the GemStone distribution?**

If you answer **yes**, the script will prompt you for the owner and group you want to use. Refer to Chapter 1 of the *GemStone System Administration Guide* for more information about setting owner and group permissions.

If you answer **no**, the permissions will remain the same as when the files were extracted from the distribution media.

### **Do you want the installation script to protect the repository file?**

The default, which we recommend, gives only the owner read and write access (600) through ordinary UNIX commands. Other users can read and write the repository through a GemStone session. If you choose not to protect the repository, the setuid bit is cleared from all executables, which causes them to run under ownership of the user who invokes them.

Default: Set the repository permission to 600, and leave the setuid bit applied.

### **Allow NetLDI to Run as Root?**

Do you want the installation script to allow non-root users to start a NetLDI that runs as root?

The NetLDI is a network server that permits remote processes to interact with the repository. There are two ways to set up a NetLDI so that it can provide services to all GemStone users: it can run as root, or it can run in guest mode with a captive account.

- To run NetLDIs as root, accept the default “yes” response. Ownership of the NetLDI executable is changed to root, and the setuid bit is set. Any GemStone user will be able to start a NetLDI process that is accessible to all GemStone users because it will always run as root. For certain services, users will need to authenticate themselves by supplying a password or Kerberos ticket. Alternatively, answer “no” but log in as root before starting the NetLDI.

If the NetLDI uses a port number less than 1024, it must run as root.

- To run NetLDIs in guest mode with a captive account, answer “no” to the prompt, because those modes are not permitted if the NetLDI runs as root. “Guest mode” means that GemStone users do not have to supply a UNIX password to use NetLDI services. The “captive account” is an account that



owns all processes the NetLDI starts; typically, it is the GemStone administrative account that owns the files. You must start the NetLDI while logged in as that account.

Default: Change ownership of the `netldi` executable to root, and set its setuid bit.

## Set up an Extent?

Do you want the installation script to set up an extent now?

GemStone is distributed with a read-only copy of the initial repository in `$(GEMSTONE)/bin/extent0.dbf`. Before you can start GemStone, this file must be copied to a suitable location and made writable. The script offers to copy the file to its default location of `$(GEMSTONE)/data`.

If you are a new GemStone user, we recommend that you answer **y**. If you are an existing GemStone user, you might prefer to answer **n**, then copy the extent to a different location yourself. (If you choose a location other than the default, you must edit your configuration file before starting GemStone. For information, see the *GemStone System Administration Guide*.)

Default: Place a writable copy of `extent0.dbf` in `$(GEMSTONE)/data`.

## Start a NetLDI?

Do you want the installation script to start a NetLDI?

If you prefer, you can start these processes manually at any time.

Almost every host needs a NetLDI. You must start a NetLDI when the Stone repository monitor or Gem session processes will run on this machine, or any of the repository files (extents, extent replicates, or transaction logs) will reside here.

You can start a NetLDI that runs as root by answering **yes** to this prompt and the confirmation that follows. However, if you want to start the NetLDI in guest mode with a captive account, you must do that after completing the installation. For more information about guest mode with captive account, see Chapter 3 of the *GemStone System Administration Guide*.

Default: Do not start a NetLDI at this time.

## Start an Object Server?

As root, you cannot start an object server, but the script offers to start one as another user. You will start the server later in the installation, so answer **no**.

Default: Do not start an object server at this time.

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Log out as root.

## Change System Passwords and Add Users

After installing GemStone 6.0, you must change the passwords for the three administrative users: DataCurator, SystemUser, and GcUser (The initial password for each is `swordfish`). The DataCurator account is used to perform system administration tasks. The SystemUser account ordinarily is used only for performing GemStone system upgrades. The GcUser account is used by the garbage collection task, which runs automatically as a separate login. Access to each of these accounts should be restricted.

Chapter 6 of the *GemStone System Administration Guide* tells you how to change the passwords and set up accounts for other GemStone users.

You must then establish GemStone accounts for each of your system's users.

The script `makeusers` in the `$GEMSTONE/install` directory helps you change the system passwords and add users. Note that the `makeusers` script assumes that the system passwords are as yet unmodified from their initial values of `swordfish`. Because `makeusers` modifies the system passwords, you can run the script only once on a given repository. To change system passwords or add more users at a later time, refer to the procedures in the *GemStone System Administration Guide*.

### NOTE

*The actions described in this procedure affect only the repository whose name you enter while running the script `makeusers`.*

1. Ensure that the GemStone environment variables are set for version 6.0:

```
% env | grep GEM
```

If necessary, set the environment variables as detailed in “Set the Environment” on page 1-7.

2. Invoke the script `gemsetup`.

C shell:

```
% source $GEMSTONE/bin/gemsetup.csh
```

Bourne or Korn shell:

```
$ . $GEMSTONE/bin/gemsetup.sh
```

The script defines the GemStone environment for users by modifying the PATH and MANPATH variables to include \$GEMSTONE/bin and \$GEMSTONE/doc, respectively.

3. Start the repository monitor (Stone). You must do this from a working directory for which you have write privilege. For instance:

```
% cd $HOME
% startstone
```

4. Invoke the script makeusers:

```
% cd $GEMSTONE/install
% ./makeusers
```

The script prompts you for the name of your Stone (the default is gemserver60), new administrative passwords, and names of the users you want to create. The password for new users will be set to gemstone.

The script writes the information you supply to a file that can be read by Topaz, an interactive GemStone interface that you can use for system administration. Topaz deletes the file when it finishes with it. By default, this file is newusers.topaz, created in your \$HOME directory. If you specify another file, be sure to give a full pathname. (You cannot create a file in the install directory unless you made the directory writable during installation.)

5. When the script makeusers has finished, run the linked version of Topaz and read in the file that the script created.

- a. Invoke linked Topaz:

```
% topaz -l
```

- b. Read in the file containing the new users:

```
topaz> input $HOME/newusers.topaz
```

Topaz reads in the file, displays GemStone's new settings, deletes \$HOME/newusers.topaz, and logs you out of GemStone.

- c. Exit Topaz:

```
topaz> exit
```

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## Have Users Execute gemsetup

The directory `$GEMSTONE/bin` contains two files, `gemsetup.sh` and `gemsetup.csh`, to help set a user's environment. These files define the GemStone environment for users by modifying the `PATH` and `MANPATH` variables to include `$GEMSTONE/bin` and `$GEMSTONE/doc`, respectively.

After GemStone 6.0 has been installed, you should notify each GemStone user of the installation and explain how to use the `gemsetup` files.

### NOTE

*This procedure applies to users ONLY, and each user must perform this procedure before running GemStone.*

1. Set the environment variable `GEMSTONE` to the *full pathname* (starting with a slash) of the GemStone 6.0 directory.

C shell:

```
% setenv GEMSTONE InstallDir/GemStone6.0-RISC6000.AIX
```

Bourne or Korn shell:

```
$ GEMSTONE=InstallDir/GemStone6.0-RISC6000.AIX
```

```
$ export GEMSTONE
```

2. Invoke the script `gemsetup`.

C shell:

```
% unsetenv LANG
```

```
% source $GEMSTONE/bin/gemsetup.csh
```

Bourne or Korn shell:

```
$ unset LANG
```

```
$ . $GEMSTONE/bin/gemsetup.sh
```

### NOTE

*Failure to clear the value of the `LANG` environment variable before running `gemsetup` can result in errors such as:*  
*gemsetup [Warning]: file ../bin/C.txt does not exist.*

3. If you will use GemStone frequently, consider adding to your login shell's initialization file (`.cshrc` or `.profile`) the environment variable `GEMSTONE` and the command `gemsetup`. This way, the GemStone

environment is automatically configured every time you log in or create a login shell. It overrides any other GemStone path settings.

*NOTE*

*If you use the Korn shell and your .profile contains commands that are not POSIX-compliant, you might encounter errors when a shell is initialized. To remedy this situation, place the non-compliant commands within a conditional, such as the following:*

```
hash -r 2>/dev/null
status=$?
if [ $status -ne 0 ]; then
    # Place Korn-shell-specific initialization here
fi
```

## What Next?

This chapter has guided you through installation of GemStone 6.0 in an initial configuration that is sufficient to create a basic repository and begin setting up user accounts. The objective was to get a simple, default configuration up and running.

You might consider performing the following tasks:

- If you ordered a related GemStone product, install it by referring to the product's installation guide.
- To modify the initial object server configuration to one that is more efficient for your particular needs, refer to Chapter 1 of the *GemStone System Administration Guide*. This chapter contains sample configurations, from small to very large, and also contains detailed information about how to tailor these configurations to your own system.
- To modify the configuration of Gem session processes and to ensure that users have the necessary permissions to access the shared page cache and the extents, refer to Chapter 2 of the *GemStone System Administration Guide*.
- If you are going to operate in a network environment, Chapter 3 of the *GemStone System Administration Guide* has additional information about the GemStone network object server (NetLDI), how to handle user authentication, how to share software over the network, and how to set up some common configurations.
- To start and stop the GemStone object server, refer to instructions in Chapter 4 of the *GemStone System Administration Guide*.

- 
- 
- GemStone/S is shipped with a default time zone of US Pacific. To modify this setting, edit the file `timezone.txt` in the GemStone `install` directory, then file it in as `DataCurator`.





# *Upgrading from Previous GemStone Versions*

---

If you are using GemStone/S version 5.1.3.1 or later, you must upgrade your repository to make it compatible with this latest release. These instructions use the version number “5.1” to represent any of versions 5.1.3.1, 5.1.4, 5.1.5, or 5.1.5.1 — the procedure is the same.

This chapter is divided into two parts:

- An overview of the recommended strategy for carrying out the upgrade.
- Instructions, which begin on page 2-3, for upgrading the GemStone Object Server.

To upgrade to GemStone/S version 6.0 from any version of GemStone prior to version 5.1.3.1, you must first upgrade to version 5.1.3.1. The instructions are printed in the *Installation Guide* for that release.

## **Review the Upgrade Strategy**

We recommend that you perform the upgrade twice: first a pilot upgrade and then the production upgrade. With this strategy, you can keep your version 5.1 production system running while you familiarize yourself with the upgrade process.

## Pilot Upgrade

The purpose of the Pilot upgrade is to familiarize yourself with the upgrade process and to help ease the upgrade of your production system. To help you gain the most information and experience from the Pilot upgrade, you must create a small repository that contains objects that are representative of your production system.

Using the representative repository, complete the upgrade and file out all changes so you can minimize down time when you upgrade your production system.

During the Pilot upgrade, you:

- Modify classes and methods that run in GemStone so they work properly with the version 6.0 classes and methods.
- Modify your application's client code as necessary. This code may be in C, C++, or client Smalltalk.

*NOTE*

*In order to use GemBuilder for Smalltalk (GBS) with the v6.0 server, you must install GBS 5.1.4 098 or later if you have not done so, and then follow the configuration instructions in Chapter 3 of this document.*

- File out the changes so they can be loaded quickly when you perform the Production upgrade.
- Recompile and relink any C or C++ programs.
- Reload client Smalltalk images.

Once you complete the Pilot upgrade, you will be able to schedule down time of your production system based on what you learned during the Pilot upgrade.

*NOTE*

*Most upgrade procedures apply to both the Pilot upgrade and the Production upgrade. Differences are noted in the procedures.*

## Production Upgrade

The purpose of the Production upgrade is to upgrade your production system using the information you gathered during the Pilot upgrade.

---

---

## Review the Upgrade Procedure

The following list summarizes the steps to upgrade to GemStone version 6.0.

- Prepare for the Upgrade .....2-3
- Run the Upgrade Script.....2-5
- Change Your GemStone Classes and Methods .....2-6

## Prepare for the Upgrade

Perform the following steps to prepare for the upgrade.

1. Install version 6.0 as described in Chapter 1.
2. Configure version 6.0 the way you expect to use it — that is, with the appropriate extent locations and sizes.

Ensure that adequate space is available for extents, transaction logs, and a backup during the upgrade:

```
% df -k
```

Space is needed for the following:

- Your version 5.1 extents and transaction logs
  - Your version 6.0 extents and transaction logs — allow for some growth of the extents during the upgrade (you can reclaim much of the physical space later by performing a full backup and restoration of the converted repository)
3. Log in to the 5.1 GemStone system and reset the SystemUser password to 'swordfish':

```
topaz 1> printit
(AllUsers userWithId: #SystemUser) password: 'swordfish'
.
System commitTransaction .
%
```

The upgrade scripts log in to GemStone with the SystemUser account and the default password.

4. Halt all user activity on the repository you are going to upgrade:

- a. Log in to Topaz as DataCurator.
- b. Force all other users off the system:

```
topaz 1> printit
System stopOtherSessions.
%
```

**CAUTION**

*You MUST file out any changes that have been made to the GemStone kernel classes in order to preserve these changes in version 6.0. Also, consider saving important modified files, such as configuration files, that will be overwritten during the upgrade.*

5. If you are performing the Pilot upgrade, file out any modifications or additions you made to GemStone kernel class methods by using Topaz command **fileout**.

For information about **fileout**, see the *GemStone Topaz Programming Environment*.

6. You must now shut down the Stone:

```
% stopstone stone51
```

where *stone51* is the name of version 5.1 Stone on this machine.

7. Set up the 6.0 environment.

Set the environment variables required for the upgrade.

C shell:

```
% setenv GEMSTONE InstallDir60
% set path = ($GEMSTONE/bin $path)
% setenv upgradeLogDir tempDir
```

Bourne or Korn shell:

```
$ GEMSTONE=InstallDir60
$ export GEMSTONE
$ export PATH=$GEMSTONE/bin:$PATH
$ upgradeLogDir=tempDir
$ export upgradeLogDir
```

where *tempDir* is a temporary directory for which you have write permission.

---

---

*NOTE*

*Use a separate log directory for each repository you upgrade. A repository may contain multiple extents.*

8. Copy your version 5.1 extent files into the location specified by the GemStone configuration option `DBF_EXTENT_NAMES`:
  - a. Using a text editor, open the file `$GEMSTONE/data/system.conf`.
  - b. Locate the last occurrence of the option `DBF_EXTENT_NAMES`, and note its value.
  - c. Copy each `.dbf` file to the noted location. For example:

```
% copydbf InstallDir51/data/extent0.dbf 60location
% copydbf InstallDir51/data/extent1.dbf 60location
% copydbf InstallDir51/data/extent2.dbf 60location
```

where *60location* is the location specified by `DBF_EXTENT_NAMES`.
9. For each extent file you copied from your 5.1 location, invoke the script `conv51dbf` with the extent name as an argument:

```
% conv51dbf 60location/extent0.dbf
```
10. Start the 6.0 Stone on the 5.1 extent you just copied:

```
% startstone stone60
```

## Run the Upgrade Script

1. Run the upgrade script:

```
$ upgrade51To60 stone60
```

where *stone60* is the name of the version 6.0 Stone started in the previous step.

This script invokes several subordinate scripts to complete the upgrade. It is normal for the display to stop scrolling occasionally while output is sent only to a log file and while methods are recompiled. Each step should end with this display:

```
No errors detected in this step.
```

If errors were reported during the upgrade, please preserve the contents of `$upgradeLogDir`. Contact your internal GemStone support person or GemStone Technical Support.

2. Log in to GemStone version 6.0 as DataCurator.
3. Change the passwords for SystemUser and GcUser, which were set to swordfish during the conversion, back to their version 5.1 values:

```
topaz 1> printit
(AllUsers userWithId: 'SystemUser') password: '51Password'
.
(AllUsers userWithId: 'GcUser') password: '51Password' .
System commitTransaction
%
```

where *51Password* is the account password used in version 5.1.

The upgraded repository is now usable. Other users can log in to assist with the next step. We recommend that you make a GemStone full backup before continuing.

## Change Your GemStone Classes and Methods

The procedures you must perform to change your GemStone classes and methods depends upon whether you are performing the Pilot upgrade or the Production upgrade.

### Pilot Upgrade

If you are performing the Pilot upgrade and modified kernel class methods of the previous version, perform the following steps.

1. Carefully compare your changes with version 6.0 kernel methods to see whether your changes are still necessary or appropriate.

In some cases, an appropriate method may have been added to version 6.0. You may find the ASCII text files in the GemStone upgrade directory useful.

2. File out these changes for use when you perform the Production upgrade.

### Production Upgrade

If you are performing the Production upgrade, perform the following steps.

1. File in the changes that you filed out from the Pilot upgrade.
2. Commit the changes.

# *Configuring GemBuilder for the v6.0 Server*

---

This chapter describes how to configure your 5.2 GemBuilder for Smalltalk (GBS) application to run with GemStone 6.0.

*NOTE*

*Applications based on an earlier version must first upgrade to GBS v5.2.  
For installation instructions, refer to the GemBuilder for Smalltalk  
Installation Guide.*

GBS requires new versions of files to be compatible with the GemStone/S 6.0 server. These files are shipped in compressed form in the GemStone 6.0 installation directory.

There is no need to modify the GBS application itself. The following section, “Copying the GemStone 6.0 Libraries,” describes the procedure for updating your libraries and getting GBS to recognize them.

## Copying the GemStone 6.0 Libraries

1. Install the GemStone 6.0 object server if you have not already done so.
2. Unzip the file `clientFiles.zip`. This file unzips into a directory tree:  
`clientFiles/<clientPlatform>/<shared library files>`
3. Quit any running client Smalltalk VM that is using GBS.
4. Login to your GBS platform as the user who is the owner of the GBS installation files.
5. In the text that follows, `<GBS>` refers to your GemBuilder installation directory, and `<SRC>` refers to the `clientFiles` subdirectory for your GemBuilder platform (for example, `$GEMSTONE/clientFiles/sparc.Solaris`). Under UNIX, it may help to define two environment variables.
6. Copy the files from the GemStone source directory `<SRC>` to the GemBuilder installation directory `<GBS>`.

On Solaris:

```
% cp <SRC>/libgcilnk60.so <GBS>
% cp <SRC>/libgcirpc60.so <GBS>
% cp <SRC>/english60.err <GBS>
```

The file extensions are `.sl` on HPUX and `.o` on AIX.

On Windows (Windows 95/98, Windows NT, and Windows 2000):

```
C:\> copy <SRC>\gcilw60.dll <GBS>
C:\> copy <SRC>\gcirw60.dll <GBS>
C:\> copy <SRC>\gsw60.dll <GBS>
C:\> copy <SRC>\englis60.err <GBS>
```

7. If it exists, delete the file `<GBS>/gbsSharedLibraryVersion.cfg`. The next time GBS needs to know the shared library version number, a prompt asks which version of the shared libraries to use. Enter the two or three digits from the file name, "60" in this example.

GemBuilder uses shared libraries on Solaris, HPUX, and Windows. The copy procedure you have just completed is sufficient to allow an existing GBS v5.2 application on Solaris, HPUX, or Windows to run with GemStone 6.0.