



Spectrum Technology Platform

Installation Guide

Version 2020.1.0

Windows



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1 - Upgrading your installation

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Upgrade paths

You can upgrade directly to Spectrum Technology Platform 2020.1.0. For some versions, you must upgrade to one or more intermediate versions before upgrading to 2020.1.0.

| Your current version | Upgrade path |
|----------------------|---|
| 2019.1.0 | Upgrade directly to 2020.1.0 |
| 2018.2.0 | Upgrade directly to 2020.1.0 |
| 12.0 SP2.1 | Upgrade directly to 2020.1.0 |
| 12.0 SP2 | Upgrade to 12.0 SP2.1, then upgrade to 2020.1.0 |
| 12.0 SP1 | Upgrade to 12.0 SP2.1, then upgrade to 2020.1.0 |
| 12.0 | Upgrade to 12.0 SP2.1, then upgrade to 2020.1.0 |

Important: Install all patches and updates in an earlier version of Spectrum Technology Platform before you upgrade to Spectrum Technology Platform 2020.1.0.

Path structure and log name changes

In release 2019.1 we have flattened the folder structure at the platform level. We have also changed the path to and names of some log files. If you are upgrading from a version earlier than 2019.1, ensure that you make the necessary changes to configure the Spectrum Technology Platform server.

Path structure

In 2019.1 we removed the `server/app` and `server/app/repository` folders. The folder hierarchy in both 2019.1 and 2020.1 is shown here:

```

.. | index          ** index location
   |-- logs         ** log files for technical support

```

```

..|repository      ** repository location
   |-- logs        ** log files for technical support
..|server          ** primary server folder
   |-- archive     ** archive files: resource bundles, reports

                   |-- audit      ** archive files: audit log data
                   |-- bundles    ** storage: resource bundles
                   |-- dataflows  ** archive: imported dataflows
                   |-- reports    ** default location for reports on disk/by

name
  |-- bin          ** startup scripts, wrapper
  |-- conf         ** configuration files
  |-- deploy       ** car and war files; consoles
  |-- doc          ** read me file(s)
  |-- drivers      ** jdbc drivers
  |-- exports      ** exported: Enterprise Designer, others
  |-- import       ** imported: license keys, flows, reports,

SPDs
  |-- error        ** import item error storage
  |-- dataflows    ** dataflow import errors
  |-- license-keys ** backup of imported license keys
  |-- lib          ** platform jar files
  |-- logs         ** log files
  |-- modules      ** product modules
  |-- ref-data     ** reference data file archive
  |-- tmp          ** temporary folder
  |-- types        ** types jar files

```

Log file location

Spectrum Technology Platform directs all log files to *SpectrumDirectory/server/logs*.

wrapper.log file name change

The `wrapper.log` file name was changed to `spectrum-server.log` in 2019.1.

Moving transactional data - upgrades only

Transactional audit log and flow history data has been moved from Neo4j to Elasticsearch to improve the maintenance of and access to this data.

Note: This section only applies for upgrades from versions of Spectrum Technology Platform earlier than 2019.1. New installations and upgrades from the 2019.1 version are not affected in this release.

If you are performing an upgrade from a version of Spectrum Technology Platform earlier than 2019.1, the upgrade process will export all transactional data into two ZIP files labeled by the prior Spectrum version number (such as 18.2):

- `Archive_Upgrade_SpectrumVersion_history.zip`
- `Archive_Upgrade_SpectrumVersion_audit.zip`

The sizes of these ZIP files depends on how much data you have.

Important: To avoid building large export files, we suggest that you purge or archive the data before you begin the upgrade process.

Standard installation (server and database on the same machine) When the Spectrum Technology Platform server and the database are installed together on the same machine, the upgrade process creates the export ZIP files in `SpectrumDirectory/server/import` directory. Then, the first time that the Spectrum Technology Platform server starts after the upgrade, it automatically imports data from the files located in this directory. Standard installations require no manual steps to accomplish this task.

Separate installation (server and database on different machines) When the Spectrum Technology Platform server and the database are installed separately on different machines, you must manually move the exported files from the machine that hosts the database to the machine that runs the Spectrum Technology Platform server.

Before you start the Spectrum Technology Platform server for the first time after the upgrade, move the exported files from the following location on the machine that hosts the database:

`SpectrumDirectory/repository/import`

To the following location on the machine that runs the server:

`SpectrumDirectory/server/import`

Spectrum Technology Platform then imports the files automatically the first time that you start the server after the upgrade.

Depending on how much data you are moving, you can expect the Spectrum Technology Platform server to start much slower than usual while the transactional data is imported back into the system and into the Elasticsearch repository. After the Spectrum Technology Platform server successfully imports all the data, it automatically deletes the ZIP files from its host machine.

Migrating your search indexes

If you are migrating from release version 2018.2 or higher, your Elasticsearch indexes will migrate during the upgrade process.

Important: Your server must be up and running to migrate your search indexes.

If you are upgrading from version 12.2.1 or earlier, you have to perform a separate, manual process as part of the upgrade to migrate your Elasticsearch indexes to release 2020.1.0. This process will maintain your compatibility with the latest version of Elasticsearch. We provide scripts to do this:

- export
- delete-all-indexes
- import

Using the command parameters outlined below, perform these steps.

Table 1: Index command parameters

| Command parameter | Description | Default value |
|---------------------------|--|-----------------------------------|
| <code>-b value</code> | Optional - Number of records in one batch | import = 1_000 export = 25_000 |
| <code>-e path</code> | Full path to where the Spectrum indexes will be exported to or imported from | |
| <code>-f value</code> | Optional - Number of records in each file | 100_000 |
| <code>-h value</code> | Optional - Number of concurrent threads | 4 |
| <code>-o operation</code> | Operation: exp, imp, or del | |
| <code>-p filename</code> | Optional – Override properties file containing default override index connection properties | |
| <code>-r value</code> | Optional – Batch size for profiling index report | 500 |
| <code>-s path</code> | Full path to the Spectrum installation location: Directory that includes the <code>/server</code> , <code>/index</code> , and <code>/repository</code> directories | |
| <code>-t value</code> | Optional – Timeout for export connection, in minutes | 5 |

You can perform the import/export from a script (*.bat or *.sh) or by using the `upgrade-index.jar` file.

- If you use the script method to import/export, the `-o` parameter is implied and does not have to be specified.
- If you are not importing/exporting from the script, specify: `javaLocation -jar upgrade-index.jar`

1. Export your indexes before upgrading to 2020.1.0.
`export.bat -e backuplocation -s spectruminstalllocation`
2. Delete your indexes.
`delete-all-indexes.bat -e backuplocation -s spectruminstalllocation`
3. Upgrade to release 2020.1.0 of Spectrum Technology Platform.
4. Import your indexes to 2020.1.0 after the upgrade.
`import.bat -e backuplocation -s spectruminstalllocation`

If you have changed default Elasticsearch certificate connection properties

Most Spectrum users will run with the default set of connection properties. However, if you did change any connection properties, you will have to pass into Spectrum the properties file with your unique settings using the `-p` command, described in the previous section.

Note: This section applies only to sites that have changed the default configuration for Elasticsearch.

Review the valid properties, below. You can ignore/omit properties that do not apply.

Index properties for 2020.1.0

```
spectrum.index.connect.timeout=
spectrum.index.encryption.keystore=
spectrum.index.encryption.keystoreAlias=
spectrum.index.encryption.keystorePassword=
spectrum.index.encryption.keystoreType=
spectrum.index.encryption.selfSignedCerts=
spectrum.index.encryption.trustAllHosts=
spectrum.index.encryption.truststore=
spectrum.index.encryption.truststorePassword=
spectrum.index.encryption.truststoreType=
```

Index properties for versions before 2019.1

```
spectrum.index.upgrade.certType=
spectrum.index.upgrade.keystore.password=
spectrum.index.upgrade.keystore.path=
spectrum.index.upgrade.truststore.password=
spectrum.index.upgrade.truststore.path=
```

Advanced Matching

Upgrading modules

When you upgrade Universal Name, Data Normalization, and Advanced Matching from Spectrum Technology Platform, you must first back up the contents of the following folders so that you can restore the data, such as indexes, matching tables, and configured properties later if anything goes wrong during the upgrade.

- cdqdb
- lucene
- matcher
- parser
- searchindex
- tables

Note: Backup and restore the *elasticsearch.template* file if you are using the snapshot and restore functionality in search index. The properties file is placed at:
SpectrumDirectory\index\elasticsearch.template.

1. Stop the Spectrum Technology Platform server.
2. Navigate to the following directory:

SpectrumDirectory/server/modules

3. Back up contents of all the folders mentioned above to a different location.
4. Perform the upgrade.
5. Start the Spectrum Technology Platform server.

Context Graph

Upgrading the Context Graph

As part of the upgrade process Spectrum Technology Platform backs up these two files from the previous version:

- `SpectrumFolder\server\modules\hub\hub.properties`
- `SpectrumFolder\server\modules\hub\db\neo4j.properties`

You can use these backups to restore any changes you made to these files. To restore changes that you made to these files, open the new files and edit the property settings that you want to retain from the previous version. It is imperative that you *do not* simply copy the old file over the new file to restore the previous settings, as some properties may have been added or removed in the new release.

Upgrading Context Graph Indexes

For releases prior to 2019.1, existing indexes will automatically be upgraded to a new format that provides better performance.

Indexed properties are now restricted to a maximum length of 4036 bytes. If a model has an indexed property that exceeds this limitation, you will not be able to open that model until you complete the following steps.

Note: If you are using Context Graph in a cluster and have hit the maximum index property constraint of 4036 bytes, see *Upgrading a Cluster with Context Graph* in the Spectrum Technology Platform Installation Guide.

1. Stop the Spectrum Technology Platform server.
2. Copy the `SpectrumFolder\server\modules\hub\db\neo4j.properties` file to the `SpectrumFolder\server\modules\hub\db\model.ModelName` folder for each model that exceeds the property constraint of 4036 characters.
3. Open the `neo4j.properties` files that you copied in step 2 on page 11 in a text editor.
4. Uncomment and set `dbms.index.default_schema_provider` to `lucene+native-1.0`.

Make sure the neo4j store upgrade is uncommented and that the following property is set to true:

```
dbms.allow_upgrade=true
```

5. Start the Spectrum Technology Platform server.
6. Open all affected Context Graph models.
7. Remove the
`SpectrumFolder\server\modules\hub\db\model.ModelName\neo4j.properties`
files.

By removing this file from the model folders, native-btree-1.0 indexing will now be used by default.

Note: We recommend that you fix all models that failed upgrade due to the 4036 indexed property constraint and re-index those models from lucene+native-1.0 indexes to the latest native-btree-1.0 indexes. See the `hub model reindex` command in the Administration Utility section of the Administration Guide.

8. Stop and restart the Spectrum Technology Platform.

Geocoding

Spectrum Enterprise Geocoding

Database memory usage

When using Enterprise Geocoding it is important to allocate the memory appropriately when configuring a larger number of country data sets. The solution is to adjust the -Xmx Java max heap space argument to a larger value.

Spectrum Global Geocoding

Java heap size recommendation

If you are loading all countries, set the maximum Java heap size for GlobalGeocode to -Xmx10500m for basic usage, -Xmx16g for normal usage, and -Xmx32g to -Xmx64g for high performance usage.

To set this, use one of the following options:

- Use the **Min memory** and **Max memory** fields on the database configuration page
- As part of a database import via the **Administration Utility** (CLI tool)
- Run a separate command from the **Administration Utility**

```
ggmglobalgeocodedb memory set --name database_name --mn  
minimum_memory_size  
--mx maximum_memory_size
```

Global Addressing

Upgrading Global Addressing

You must upgrade from the 2018.2 or earlier versions of Global Addressing to the 2020.1.0 version to continue processing with Global Addressing.

To upgrade directly to the 2020.1.0 version of Global Addressing from the Spectrum 2018.2 version, you must have applied the 2018.2 S18 product update and be using Q1 2019 or newer data.

To upgrade from any version prior to the 2018.2 S18 version of Global Addressing (2018.2 **without** the S18 product update, 12.2.1, or 12.2), follow these steps to ensure your existing jobs continue to process correctly:

1. Delete the old Global Addressing databases (databases prior to the Q1 2019 data refresh).
2. Upgrade to Spectrum Technology Platform 2020.1.0.
3. Follow the instructions in the *Spectrum Technology Platform Installation Guide* to install new SPD data files (Q1 2020 or newer).
4. Follow the instructions in the *Spectrum Technology Platform Installation Guide* to use the Management Console or CLI commands to create a database resource from the newly installed SPD data files.

Note: Create the new database resources using the database names that were used for the previous database resources to ensure existing jobs process correctly.

The Spectrum Technology Platform 2020.1.0 release requires Q1 2020 or newer data.

Global Sentry

Upgrading Global Sentry

Before upgrading Global Sentry, you should first back up the contents of these folders so you can restore the data later if necessary:

- `ServerLocation\Program Files\Precisely\Spectrum\GlobalSentryDatabase\data`
- `ServerLocation\Program Files\Precisely\Spectrum\server\modules\ois\db\data`

Machine Learning

Configuration settings

Configure 2020.1.0 settings for Machine Learning in the on the **Configuration Settings** tab of the Machine Learning Model Management application.

Changes to Machine Learning settings are not saved from 18.2 version

Changes to Machine Learning settings are not saved during an upgrade to this release from 18.2 or earlier versions of Spectrum Technology Platform. After you upgrade to this release of the Spectrum Technology Platform, you can restore any changes made in the earlier version on the **Configuration Settings** tab of the Machine Learning Model Management application.

Install all patches before upgrading from previous version

If you upgrade from the 19.1 version without first installing all existing patches you may have to edit the minimum memory and maximum memory settings for Machine Learning after the upgrade to match previous settings.

Spatial and Routing

Backup Spatial named resources and data

Although part of the Spectrum upgrade installation process for Spatial is to automatically back up the data from a previous release before the upgrade continues, it is important to back up custom data sources and resources prior to upgrading using the `limrepo export` command in the Administration Utility (see the Administration section of the *Spectrum Spatial Guide* for instructions).

Any data that was installed with the module will be deleted after upgrade. If custom data is located in the same directories, back it up and copy to the same location in the Spectrum Technology Platform directories once upgraded. Pay special attention to any data or resources that have been added to default locations within the `%install_home%\Spectrum\server\modules\spatial\` directory, as these will be deleted after upgrade. For example, if you have used the default TileCache directory for generating your map tiles, back it up, and copy to the same location once upgraded.

It is also very important to perform a backup of the repository after the Spectrum Technology Platform upgrade is successful, to serve as a baseline in case your repository becomes corrupt later on.

Backup Spatial configuration files

Although the upgrade process from Spectrum Technology Platform will automatically back up configuration files (which are stored in the repository) and properties files for Spatial, as well as merge custom settings, it is still important to back up the files before proceeding with an upgrade.

Follow these instructions if you:

- Run Spectrum Technology Platform server on a port other than 8080.
- Have made changes to any of these Spatial configuration files:
 - Mapping
 - Feature
 - Map Tiling
 - WFS
 - WMS
 - WMTS

Before an upgrade, you should also back up the `java.properties` and `java.vargs` files that reside in `%install_home%\server\modules\spatial` to preserve any customizations you have made.

To back up user-modified configuration files and properties files:

1. Use the `limrepo export` command in the Administration Utility to export the configuration files:
`limrepo export --s SourceRepositoryPath --o OutputFilePath --a --c --f.`

For example, `limrepo export --s /Configuration --o C:\myrepository\configuration --a --c --f`

Note: For instructions on using the Administration Utility, see the Administration section of the Spectrum Spatial Guide. It is strongly recommended that you use the Administration Utility to export and import configuration files instead of WebDAV to ensure the files will comply with the new version of Spatial.

2. If upgrading from version 2018.2 or earlier, make a backup copy of `\modules\spatial\java.properties` and `java.vargs` to save any non-default settings.

Note: As of version 2019.1.0, these properties are set in the Spectrum Management Console.

3. Perform the Spectrum Technology Platform upgrade.

If you have a successful upgrade, back up the new set of configuration files under `%install_home%\server\modules`. This backup will assist Tech Support should you encounter an issue with your installation. If you did not have a successful upgrade, follow the instructions described in [Spatial upgrade backup failure procedure](#) on page 16.

Note: If upgrading from version 2018.2 or earlier, and you forgot to back up the configuration, `java.properties` or `java.vargs` files, you can check the backup zip file that is created by the upgrade process (as long as no failures occurred). This zip file (`upgrade_backup_yyyyMMddHHmmss.zip`) is located under `%install_home%\server\modules`.

Spatial upgrade backup failure procedure

Part of the Spectrum upgrade installation process for Spatial is to automatically back up the data from a previous release before the upgrade continues. If the installer encounters an error during the backup, the installer displays a message and stops.

To re-attempt an upgrade after the error, complete these steps:

1. Go to the `SpectrumDirectory\server\modules` and make a backup of the `lim_backupx.x` folder at some other location (where `x.x` is the backup version).
2. Delete the `lim_backupx.x` folder from the `\modules` directory.

3. Re-launch the Spectrum installer and follow the installation steps.

To ensure a successful upgrade process, manually back up your data beforehand. See [Backup Spatial named resources and data](#) on page 15.

Upgrading a clustered environment for Spatial

The upgrade process for a clustered environment in Spatial is documented in the "Cluster" section of the *Installation Guide* located on support.precisely.com. See the topic entitled, "Upgrading a Cluster with Spatial."

Heap memory and pool size

For new installations, the default heap memory is 2048 MB (2GB). An upgrade maintains the existing heap size value. For more information, see the performance tuning topics in the *Administration* section of the *Spectrum Spatial Guide*.

A new installation sets the default pool size to 4. An upgrade does not affect pool size except when it is less than 4. In this case, upgrading resets the value to 4. To change the **Remote Component Pool Size** value after installing or upgrading Spectrum Spatial, open the Spectrum Management Console, and select **Resources** and then **Spatial**. Change the pool size value and click **Save**. For details, see *Modifying the Pool Size* in the *Spectrum Spatial Guide*.

Upgrading with ACL

When upgrading to 12.0 SP2 or later, the Access Control List (ACL) model is upgraded to a new security model. The migration script will run as a part of installation but it also can be run independently of the installation procedure.

Note: If you export the command line interface (CLI), it does not alter the permissions. These permission will need to be migrated. For example, the resources from 12.0 SP1 and earlier come with a VIEW permission, but when you upgrade to 12.0 SP2 or later, the migration script changes VIEW to EXECUTE.

The migration script will run the first time Spectrum Technology Platform is started after upgrading to 12.0 SP2 or later versions. It will only run once. The migration script will perform the following:

- All the permissions on folders will be removed.
- All the permissions on resources will be removed.
- The new EXECUTE permission will be applied if the VIEW permission existed on any resources.

- Any existing Deny permissions will be removed.
- Dataset VIEW permission is removed. Other permissions on Dataset such as CREATE, MODIFY, and DELETE will be preserved if they existed before the upgrade.
- NamedResourceMetadata resources will have no ACL for now.

Note: Having added the new EXECUTE permission, the Spectrum Technology Platform will start over with the new permissions.

Spatial installation directory names and special characters

For Spectrum Technology Platform installations that include Spatial, the installation directory names must not contain any of the following characters.

- & - Ampersand
- > - Greater Than
- < - Less Than
- ' - Apostrophe
- " - Quote

Routing Upgrade Permissions

When upgrading Spectrum Spatial (which includes routing) to version 2020.1.0, all existing user accounts by default receive routing permissions. When creating a new user in the Spectrum Management Console, select user permissions under the **Routing** section (not under the **Enterprise Routing** section). New users created in the Spectrum Management Console will not have **Enterprise Routing** permissions.

To set routing permissions for a role in the Spectrum Management Console:

1. On the main menu, click **System** and then select **Security**.
2. On the **Security** page, select the **Roles** tab.
3. In the **Name** list, click the role that you want to add routing permission to.
4. On the **View Role** page, expand **Database Resources**.
5. Beside Routing, select the permission check boxes to add to the role you selected. Permissions include, **Create**, **View**, **Modify**, **Delete**, and **Execute**.

| Database Resources | | | | | |
|----------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Create | View | Modify | Delete | Execute |
| Centrus Database Resources | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Enterprise Routing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Routing | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Spatial Component | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Routing database memory usage

When loading a large Enterprise Routing database, you might have to increase the memory of the routing remote component. This setting is made in the Management Console after upgrading.

To increase the memory of the routing remote component in the Management Console, select **Spectrum Databases** from the **Resources** menu. On the **Spectrum Databases** page, click on the routing database you want to increase the memory for. On the **Edit Database** page, increase the **Max memory (MB)** value.

Deprecating features and products

Retirement of the Legacy Point in Polygon and Closest Site stages

From this release we have removed the following from the Spectrum Spatial Module.

- **Centrus:** The ability to configure a database resource for Centrus in the Spectrum Management Console is no longer available as of this release.
- **Closest Site stage:** This stage is retired. Running a flow that includes the Closest Site stage displays the message "Stage 'Closest Site' does not exist."
- **Legacy Point in Polygon stage:** This stage is retired. Running a flow that includes the Legacy Point in Polygon stage displays the message "Stage 'Legacy Point in Polygon' does not exist."

We recommend all customers who were using these stages move to the standard capabilities of the Spectrum Location Intelligence Module, such as the Find Nearest, Point in Polygon, Query and Read Spatial data, and other Spatial stages. These newer stages are all available with the Spectrum Spatial with no additional license needed. They are explained in the topic **Spatial Stages** in the *Spatial Guide*.

These standard stages can use MapInfo TAB files, shape files, or RDBMS sources (such as Oracle, SQL Server and PostGIS) for data access rather than the GSB files used by these stages. With TAB files further performance improvements can be obtained if an optional PGD index is created as explained in the topic **PGD Builder** in the *Spatial Guide*.

How do I know if I am using the stages that are no longer supported?

Prior to upgrading you can check if you are using Centrus as follows:

1. Check if you have a Centrus database configured.

Log into the Spectrum Management Console and on the top-level menu go to Resources and the choose Spectrum Databases. If a Centrus database is in the list, then you have configured a Centrus database.

2. Check if you are using either of the two spatial stages that use these files. Log into Spectrum Enterprise Designer, and check if your data flows include the **Legacy Point in Polygon** or the **Closest Site** stages.

If you have a Centrus database configured but you are not using either of these two stages, then you are not using the Centrus stages.

If you have any further questions please do not hesitate to reach out to our Technical Support Team at (see support.precisely.com) and we will work with you to advise on your particular circumstances.

Post upgrade procedures

Properties for managing the database connection pool, file handles, and the repository cache are set in the Management Console by the administrator (admin).

After upgrading to version 2020.1.0 or higher, the administrator must check the Spectrum Spatial property settings to ensure that they are up to date for new features. Spectrum Spatial maintains the settings from previous versions. As a result, some settings will not include new feature options.

To ensure your upgrade includes new properties and property settings:


1. Open a web browser and go to `http://server:port/managementconsole`

Where:

server is the IP address or hostname of your Spectrum Technology Platform server.

port is the HTTP port used by Spectrum Technology Platform. The default is 8080.

2. Log in using the admin account.
3. From **Resources**, click **Spatial**.
4. Expand each of the **Java Properties**, **Environment Variables**, or **Process arguments** lists and check for the settings listed below.
5. To change the value of an existing property, click on the value and type your changes.

To add a new field in the Java Properties list, click the **Add**  button. This creates a new property field at the end of the Java Properties list. Enter the new property name, and then enter its value.

6. Click **Save**.

Changes to these properties take effect immediately.

Java Properties

If you do not see these properties after upgrading Spectrum Spatial, then you must add them. The default values to use are provided in the *Initial Value* column in the below table.

| Property | Initial Value |
|---------------------------------|--|
| pool.database.autoRegisterMBean | false |
| pool.database.jdbcInterceptors | QueryTimeoutInterceptor(queryTimeout=-1) |
| timeout.feature.value | -1 |
| timeout.mapping.value | -1 |

For a description of these settings, see *Spatial Java Properties* in the *Spectrum Spatial Guide*.

Environment Variables

The **LD_LIBRARY_PATH** environment variable must be set to the following after upgrading Spectrum Spatial.

```
$(gl.server.modules.dir)/spatial/lib:$(gl.server.modules.dir)/spatial/lib/native/fgdb:$(gl.server.modules.dir)/../bin
```

If it is not, then you must edit this property and add the information that is in **bold**.

Process arguments

The **Process arguments** property must be set to the following after upgrading Spectrum Spatial.

```
-Dspatial
-Dcom.pb.midev.dp.fgdb.native.dir=../modules/spatial/lib/native/fgdb
-Dcom.pb.midev.raster.mrr.native.dir=../modules/spatial/lib
-Dcom.pb.midev.dp.jfal.native.dir=../modules/spatial/lib/native/efal
-Dcom.pb.midev.dp.gpkg.native.dir=../modules/spatial/lib
-DpoolingDataSourceFactoryClass=com.pb.spectrum.spatial.component.remote.PoolingDataSourceFactory
-Djava.rmi.server.useCodebaseOnly=true
```

If **-Dcom.pb.midev.dp.fgdb.native.dir=../modules/spatial/lib/native/fgdb** is missing, then you have to add it (you can append to what is already there).

Universal Addressing

Canadian Database Update

If you are upgrading to version 2020.1.0 from any version earlier than 2019.1 and you use the *Universal Addressing Canadian database*, you must reinstall the database. An updated coding engine that is not compatible with earlier database versions is installed with the Spectrum Technology Platform starting with version **2019.1**.

Visual Insights

Visual Insights not supported on clusters

Visual Insights is not supported on a clustered environment. To run Visual Insights on a non-clustered environment, the property `spectrum.security.session.clusterable` must be set to `false`. For more information, see the *Visual Insights Guide*.

2 - Planning Your Installation

In this section

| | |
|-----------------------------|----|
| Installation Scenarios..... | 24 |
| Before You Begin..... | 27 |
| System Requirements..... | 29 |

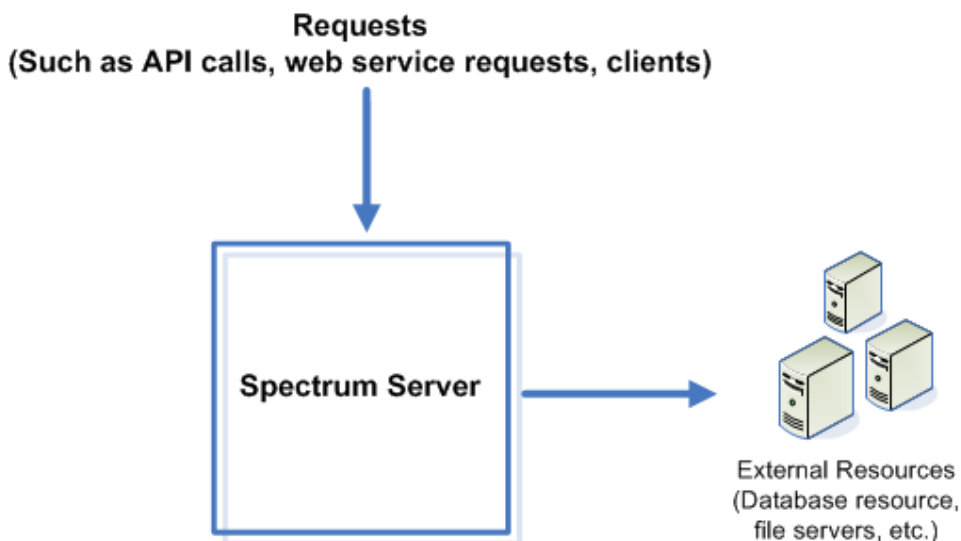


Installation Scenarios

Spectrum Technology Platform supports a variety of installation scenarios that scale to fit the needs of your organization.

Standard

The standard scenario is the simplest installation scenario. You install Spectrum Technology Platform on a single server. All activity is handled by this one server, including designing dataflows, storage of configuration information, running jobs, and handling service requests.

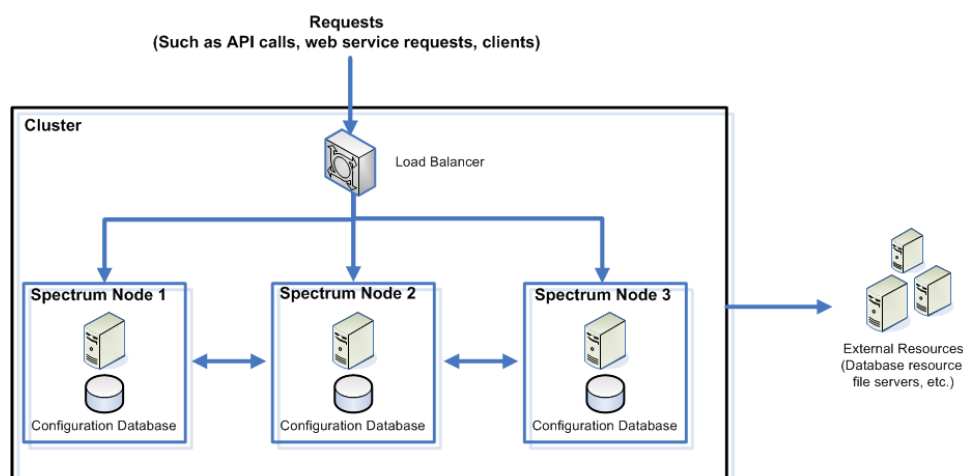


Cluster

In a clustered environment, processing is shared among two or more instances of the server. All communication with Spectrum Technology Platform goes through a load balancer. Instead of using the URL and port of the Spectrum Technology Platform server, you use the URL and port of the load balancer. Consider using this approach if you require failover redundancy and high-volume, high-performance processing.

Important: As part of your cluster setup and machine preparation, ensure that all system times are synchronized across all nodes in the cluster.

This diagram illustrates the cluster architecture:



This approach has the following advantages:

- Processing is automatically distributed among the nodes in the cluster for optimal performance.
- Configuration settings are automatically synchronized across nodes.
- Uptime can be improved since if a node goes down the other nodes remain available to handle processing requests.
- Adding a new node is easy.

Cluster with Separated Configuration Database

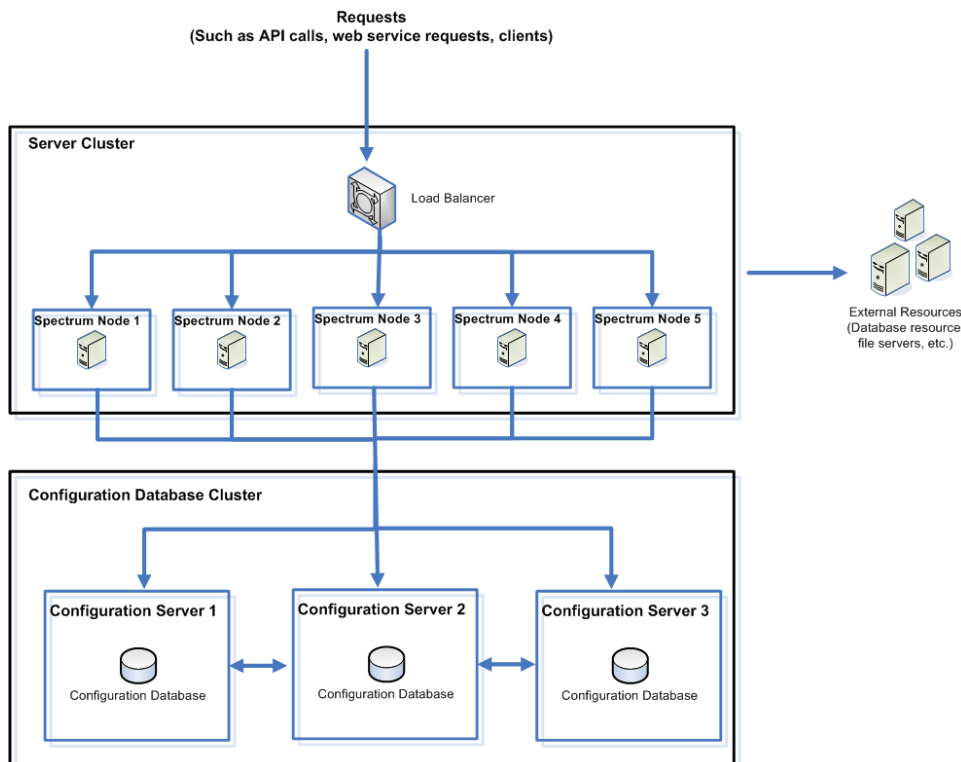
When you install the Spectrum Technology Platform server you are installing two things: server software and a configuration database. The server handles the execution of jobs and service requests, reporting, and logging. The configuration database stores data such as users and roles, data connections, dataflows, and the audit log.

For clusters consisting of only a few nodes, installing the server and configuration database together on the same server provides acceptable performance. However, a cluster that consists of a large number of nodes may have its performance negatively affected by having a copy of the configuration database on each node. This is because an increasing number of nodes results in increased data replication between nodes during synchronization. Performance may also suffer if users are accessing the configuration database frequently through activities such as editing dataflows or job schedules. These activities require processing power, resulting in less CPU capacity available for running jobs and responding to service requests.

If you have an implementation with four or more nodes, you should consider installing the configuration database to separate servers. This is the most scalable installation scenario because you can add nodes without necessarily adding another instance of the configuration database. For example, say you have five nodes and three configuration database servers. You could add another five nodes, bringing the total number of nodes to 10, while still using just the three configuration databases to support all 10 nodes.

Installing the configuration database to a separate server has the following advantages:

- More CPU is available to the server for running jobs, process flows, and service requests because reading and writing to the configuration database is handled by a separate server.
- Reduced network traffic due to reduced configuration data replicated between nodes. For example, you could have five Spectrum Technology Platform servers for handling execution while having only three repositories. With just three repositories instead of five, data only needs to replicate between three servers rather than five.
- Most scalable installation scenario.



Before You Begin

Before Installing on Windows

Java JDK Version

You must have the Java 8 JDK (64-bit) installed to run Spectrum Technology Platform. If you do not have the Java 8 JDK version installed, you can download it from the vendor sites based on the platform. Follow the links to download and install the Java 8 JDK (64-bit).

Install the JDK and Set the JAVA_Home Environment Variable

Regardless of the operating system, you must have the Java 8 JDK (64-bit) installed to run Spectrum Technology Platform.

The following table lists Java distributions that have been tested with the Spectrum Technology Platform.

| Operating System | Azul | Oracle |
|------------------|------|--------|
| Windows Server | Yes | Yes |

Set the JAVA_HOME environment variable.

Setting the JAVA_Home Environment Variable on Windows on page 28

Note: To change the Java installation on a system that is currently running the Spectrum Technology Platform, you must stop Spectrum before performing changes to the Java installation. Restart Spectrum only after you complete the changes.

Setting the JAVA_Home Environment Variable on Windows

Before you begin the installation process, you must configure environment variables that specify the location for your installation of 64-bit Java.

Set the JAVA_HOME variable to point to the Java application folder on your system, and add the path to the Java bin folder to the system Path variable.

Note: The environment variable settings described here may already be configured if you ran a setup application to install Java.

1. Open the Windows **Environment Variables** settings dialog box.
 - a) In Windows **Control Panel**, click **System**.
 - b) In **Computer name, domain, and workgroup settings**, click **Change settings**.
 - c) In the **System Properties** dialog box, click the **Advanced** tab, and then click **Environment Variables**.

Note: Variable settings defined in the **User variables** box apply only for the current user login or profile. Variable settings defined in the **System variables** box apply for any user account that logs into Windows. The user variable setting is used when it has the same name as a system variable. On the other hand, the effective Path is the user Path variable appended to the system Path variable, so the order of entries are system entries followed by user entries.

2. Add JAVA_HOME as a new Windows environment variable to specify the Java application folder.
 - a) For **System variables**, click **New** if the JAVA_HOME variable does not already exist.
 - b) For **Variable name** enter JAVA_HOME.
 - c) For **Variable value** enter the full path to the Java application folder.
For example, C:\Program Files\Java\zulu-8.
 - d) Click **OK**.
3. Add %JAVA_HOME%\bin to the Path variable.
 - a) In **System variables**, click the **Path** variable.
 - b) Click **Edit**.
 - c) Double-click the first blank entry in the box.
 - d) Enter %JAVA_HOME%\bin.
 - e) Click **OK**

System Requirements

Server

Operating Systems

| Supported Operating System | Notes |
|--------------------------------------|-------|
| Windows Server 2012 R1 and R2 | |
| Windows Server 2016 | |
| Windows Server 2019 | |

Unsupported Operating Systems by module

All modules support the Windows operating systems listed in the previous section.

The following table shows the Linux operating systems that are not supported for specific modules.

| Module | Not Supported |
|--------------------------------------|---|
| Spectrum Enterprise Geocoding (U.S.) | SUSE Enterprise Linux Server 12.x Ubuntu 16.04 LTS, Ubuntu 18.04 LTS, Ubuntu 20.04 LTS |
| Spectrum Enterprise Tax | SUSE Enterprise Linux Server 12.x, SUSE Enterprise Linux Server 15 SP1 |
| Spectrum GeoEnrichment | SUSE Enterprise Linux Server 12.x, SUSE Enterprise Linux Server 15 SP1 |
| Spectrum Global Geocoding | SUSE Enterprise Linux Server 12.x, SUSE Enterprise Linux Server 15 SP1 (not supported for U.S. geocoder) |

| Module | Not Supported |
|---|---|
| Spectrum SAP | Ubuntu 16.04 LTS , Ubuntu 18.04 LTS, Ubuntu 20.04 LTS |
| Spectrum SugarCRM | Ubuntu 16.04 LTS, Ubuntu 18.04 LTS, Ubuntu 20.04 LTS |
| Spectrum Universal Addressing | Ubuntu 16.04 LTS, Ubuntu 18.04 LTS, Ubuntu 20.04 LTS |
| Spectrum Universal Addressing - Validate Address Global | Ubuntu 16.04 LTS, Ubuntu 18.04 LTS, Ubuntu 20.04 LTS |

Disk Space

| New Installation | Upgrade |
|---|---|
| <ul style="list-style-type: none"> The disk where you are installing Spectrum Technology Platform must have 4 GB of free space to install all modules, less if installing fewer modules. The disk where the temp folder is located must have at least 10 GB of free space for the installation to extract the files it needs. You may need more depending on the options you are installing. If necessary, modify your TEMP environment variable (Windows) or ITEMPDIR environment variable (Linux) to point to a location with enough space. | <ul style="list-style-type: none"> Upgrade memory requirement - You must have a minimum of 8GB of RAM to run the upgrade to release 2020.1.0. The disk where you are installing Spectrum Technology Platform must have free disk space equal to three times the size of your current installation. To determine the size of your current installation, look at the size of the folder where you installed Spectrum Technology Platform. If you are adding modules as part of your upgrade, you will need 3 GB to install all modules, less if installing fewer modules. The disk where the temp folder is located must have 10 GB of free space plus four times the size of your current installation. For example, if your current installation is 5 GB, you would need 30 GB of temp space: $(4 \times 5 \text{ GB}) + 10 \text{ GB} = 30 \text{ GB}$. If necessary, modify your TEMP environment variable (Windows) or ITEMPDIR environment variable (Linux) to point to a location with enough space. |

Note: If you are installing a module that uses a reference database, such as a postal database, geocoding database, or data normalization tables, you will need space for this data. The total disk space varies, depending on which modules and databases you are installing.

Memory

- **Upgrade memory requirement** - You must have a minimum of 8GB of RAM to run the upgrade to release 2020.1.
- Basic memory requirement: 16 GB
- Data Normalization and Universal Name require additional memory if you use these name databases:
 - Arabic Plus Pack: 5.5 GB
 - Asian Plus Pack - Chinese: 32 MB
 - Asian Plus Pack - Japanese: 1.6 GB
 - Asian Plus Pack - Korean: 8 MB
 - Core Names: 1.1 GB
- The memory allocation for the Machine Learning should be three to four times the size of the input file used in jobs where models are created. We recommend that the minimum memory setting should be at least 1 GB. After installation of this release, configure minimum and maximum memory settings for Machine Learning on the **Configuration Settings** tab of the Machine Learning Model Management application.

Additional Requirements

- Windows administrator rights are required to install .
- In order to use the enhanced system tray notification application the server must have .NET Framework 3.5 SP1 (also known as 3.5.1) or higher. Current versions of Windows Server come with the required version of .NET Framework.

System Requirements for Enterprise Geocoding and Global Geocoding

- The Enterprise Geocoding and Global Geocoding system requirements:
 - minimum: 16 GB RAM, 4 CPU, 100 GB storage
 - recommended 32 GB RAM, 8 CPU, 200 GB storage, sufficient for all datasets.

The amount of RAM will depend on how many users are on the system and how many datasets are loaded.

Requirements for the Big Data Integration

For the stages using Hadoop, which are **Read from Hive File**, **Read from Hadoop Sequence**, **Write to Hadoop Sequence**, and **Write to Hive File**, and for the activities **Run Hadoop MapReduce Job** and **Run Hadoop Pig**:

- Hadoop version 2.6 and above

For the activities using Spark, which are **Submit Spark Job** and **Spark Sorter**:

- Spark 2.0.1 and above.

File locations

This topic shows where files are located in the folder hierarchy of the Spectrum Technology Platform server application folder.

The default location for the Spectrum Technology Platform

SpectrumFolder\repository\data\databases is *C:\Program*

Files\Precisely\Spectrum, but you can specify a different location when you install the server.

```

..|index                ** index location
   |-- logs             ** log files for technical support
..|repository           ** repository location
   |-- logs             ** log files for technical support
..|server               ** primary server folder
   |-- archive          ** archive files: resource bundles, reports
                        |-- audit          ** archive files: audit log data
                        |-- bundles        ** storage: resource bundles
                        |-- dataflows      ** archive: imported dataflows
                        |-- reports        ** default location for reports on disk/by
name
   |-- bin              ** startup scripts, wrapper
   |-- conf              ** configuration files
   |-- deploy           ** car and war files; consoles
   |-- doc              ** read me file(s)
   |-- drivers           ** jdbc drivers
   |-- exports           ** exported: Enterprise Designer, others
   |-- import           ** imported: license keys, flows, reports,
SPDs
   |-- error            ** import item error storage
   |-- dataflows        ** dataflow import errors
   |-- license-keys     ** backup of imported license keys
   |-- lib              ** platform jar files
   |-- logs             ** log files
   |-- modules          ** product modules
   |-- ref-data         ** reference data file archive
   |-- tmp              ** temporary folder
   |-- types            ** types jar files

```

Network Ports

The Spectrum Technology Platform server uses several network ports for communication. Network port conflicts can result in module components failing to start. One indication that a component has failed to start is if it does not appear in Management Console. To troubleshoot the problem, look in the Spectrum Technology Platform log. This log shows which port is causing the problem. Open the following file to view the Spectrum Technology Platform server log:

`SpectrumFolder\server\logs\spectrum-server.log`

Server port settings defined in the `spectrum-container.properties` file

You can modify network ports by modifying properties settings in the following file:

`SpectrumFolder\server\conf\spectrum-container.properties`

Restart the server after you make changes to the property settings.

Note: In a clustered environment you must modify the `spectrum-container.properties` file on *each node* in the cluster.

| Port | Description |
|------|---|
| 5001 | <p>This port is used by the Spectrum Technology Platform configuration database.</p> <p>To use a different port in a non-clustered environment, configure settings in the <code>SpectrumFolder/repository/neo4j.template</code> file.</p> <p>To use a different port in a clustered environment, configure the spectrum.repository.server.seeds property to specify the seed nodes for the configuration database.</p> |
| 5701 | <p>This port is used by Hazelcast for managing distributed processing between Spectrum Technology Platform servers in a cluster.</p> <p>To use a different port in a non-clustered environment, modify this property:</p> <p>spectrum.cluster.port</p> <p>To use a different port in a clustered environment:</p> <ul style="list-style-type: none"> Specify the port you want to use instead of 5701 in spectrum.cluster.port. Include the Hazelcast port number after each IP address specified in spectrum.cluster.seeds. For example, if spectrum.cluster.port is set to 5702 and the IP address of a seed node is 1.2.3.4.5, you would specify <code>1.2.3.4.5:5702</code> in spectrum.cluster.seeds. |
| 6362 | <p>This port is used if you enable backups of the Spectrum Technology Platform configuration database. To use a different port, modify this property:</p> <p>spectrum.repository.backup.port</p> |
| 7474 | <p>This port is used by the Spectrum Technology Platform configuration database. To use a different port, configure settings in the <code>SpectrumFolder/repository/neo4j.template</code> file.</p> |
| 7687 | <p>This port is used by the Spectrum Technology Platform configuration database. To use a different port, configure the spectrum.repository.port property.</p> |

| Port | Description |
|-------|--|
| 8080 | The port used for communication between the server and Spectrum Enterprise Designer and Spectrum Management Console. This port is also used by web services. To use a different port, modify this property: <code>spectrum.http.port</code> |
| 9200 | This port is used by the index server. To use a different port, modify this property: <code>spectrum.index.http.port</code> |
| 9300 | This port is used by the search index engine used by the Advanced Matching, configured using <code>spectrum.index.tcp.port</code> . |
| 10119 | This port is used for API calls made to services. To use a different port, modify this property: <code>spectrum.socketgateway.port</code> |
| 32751 | This port is used for ODBC connections model stores which are created in Discovery. To use a different port, modify this property: <code>spectrum.metadata.odbc.port</code> |

Context Graph port settings defined in the `neo4j.properties` file

You can modify Context Graph ports by modifying the properties in this file and restarting the server:

- `SpectrumFolder\server\modules\hub\db\neo4j.properties`

| Port | Description |
|-----------|---|
| 6044-6299 | These ports are used by Context Graph. This is specified by the following property: <code>ha.host.data.port</code> |
| 6372-6627 | These ports are used by Context Graph. This is specified by the following property: <code>dbms.backup.address</code> |
| 7001 | This port is used by Context Graph. This is specified by the following property: <code>ha.host.coordination.base_port</code> |

Machine Learning

Ports documented in this section are required for Machine Learning.

| Port | Description |
|-------|--|
| 15431 | Port 15431 is required for Machine Learning. |

Enterprise Designer

Enterprise Designer can connect to a Spectrum Technology Platform server on any currently supported platform.

System requirements:

- Operating system: Microsoft Windows 10
- 86 MB of disk space to install Enterprise Designer without any modules. Each module you install requires additional disk space.
- Microsoft .NET Framework 4.6

Available on the Spectrum Technology Platform Welcome Page
(http://Spectrum_server:port)

- A monitor with at least 1024 x 768 resolution
- Maximum DPI setting: 150%
- Adobe Reader 7 or later (for viewing and saving reports)

Web Browsers

We recommend that you disable browser pop-up window blocking when using Spectrum Web-based applications.

- Microsoft Edge (Chromium) 86.0 or later
- Google Chrome 86.0 or later
- Mozilla Firefox 82.0 or later
- Microsoft Internet Explorer 11 is no longer supported except to use with Relationship Analysis Client, which requires Microsoft Silverlight.

See [Get Microsoft Silverlight \(www.microsoft.com/getsilverlight\)](http://www.microsoft.com/getsilverlight). There is no longer any support for Microsoft Silverlight on Chrome, Edge, Firefox, or any browser using the Mac operating system.

Tip: Spectrum Discovery and the Spectrum Technology Platform Command Line Interface support functionality found in Relationship Analysis Client for creating and editing Context Graph models.

Note: After you install this version of Spectrum, subsequent patch updates may sometimes require clearing the cache in the browser to take effect. Refer to the browser documentation for instructions about how to clear the cache.

Command Line Tools

Job Executor and Process Flow Executor

The Job Executor and Process Flow Executor command line tools require Java 8.

User Interface Languages

Spectrum Technology Platform user interfaces such as Management Console, Enterprise Designer, and web applications are localized for these languages:

- English
- French
- German
- Japanese
- Spanish

Client SDK

The Client SDK provides API access to Spectrum Technology Platform services. To use the Client SDK your computer must meet the following requirements:

- 1.25 GB disk space
- JDK 8 is required to install the Client SDK. Be sure that JDK 8 is in the PATH environment variable.

Supported Compilers

The Spectrum Technology Platform Client SDK is supported with the following compiler and runtime minimum versions.

Java

Client SDK Package Directory: `clientSDK/platforms/java`

Client SDK requires *Java version 8*. This is not installed with the Client SDK.

Note: Oracle Java and Azul are supported.

Windows 64-bit

- JDK: version 8
- C Compiler: MSVC 2005, MSVC 2008
- C++ Compiler: MSVC 2005, MSVC 2008

Global Addressing Support

Global Addressing requires the Visual C++ Redistributable Packages for Visual Studio 2013 for the Windows platform that is available for download at

<https://www.microsoft.com/en-us/download/details.aspx?id=40784>.

Spatial Support

Databases

Spectrum Spatial, which includes routing, supports the following spatial databases for use with the spatial services, data, and resources:

- Oracle 12CR2, Oracle 18C, and Oracle 19C
- SQL Server 2016 and SQL Server 2017
- PostgreSQL 11.5 (with PostGIS 2.5) and PostgreSQL 12.0 (with PostGIS 3.0)

Note: Spectrum Spatial requires the PostGIS extension for PostgreSQL data source provider even if spatial capability will be not needed or used.

- GeoPackage (Windows and CentOS)

Data Formats

Spectrum Spatial supports the following data formats for use with the spatial services:

- Generic JDBC (with XY)
- TAB (native, native extended, raster, grid, seamless, DBF)
- ESRI shapefile
- ESRI File Geodatabase (read access to vector layers of File Geodatabases, .gdb directories, created by ArcGIS 10 and above)

Raster Formats

In order to use rasters and grids as a map layer, there must be an associated .TAB file containing georeference information about the image, including the bounds, coordinate system, and registration points.

Spectrum Spatial supports the following raster and grid formats (64-bit only):

Raster Formats

| Format | File Extension |
|--|----------------|
| ADRG | .gen |
| ASRP | .gen |
| BMP | .bmp, .wbmp |
| CADRG | .gen |
| CIB | various |
| ECW (SDK v5) Note: On Windows, install Visual C++ 2012 | .ecw |
| GeoTiff | .geotif |
| GIF | .gif |
| JPEG | .jpg/.jpeg |
| MrSID (SDK v9) Note: Supports MG4 (MrSID Generation 4). | .sid |
| NITF | .ntf |
| PNG | .png |
| TIFF Note: TIFF files used by the Feature Service and Mapping Service cannot exceed 2GB. | .tif |

Grid Formats

| Format | File Extension |
|---|------------------------|
| Defense Digital Terrain Elevation Data (DTED) | .dt0, .dt1, .dt2, .dt3 |
| MapInfo Grid | .mig |
| MRR (Multi-Resolution Raster) | .mrr |
| Vertical Mapper Classified Grid | .grc |
| Vertical Mapper Continuous Grid | .grd |

Utilities

Spectrum Spatial utilities (Tile Generator, WMTS Tile Generator, and the Geometry Validator) require, at a minimum, Java 8.

.NET Samples

The .NET samples require at a minimum Visual Studio 2013 and Microsoft .NET Framework 4.5.

MapInfo Professional Compatibility

The Map Uploader provided by Spatial is compatible with MapInfo Professional 16.x or higher. For more information about the interoperability of the two products, see the section titled *MapInfo Pro* under *Getting Started* and *Tools* in the *Spectrum Spatial Guide*.

WebDAV

When communicating to the server over HTTPS to map a drive to the repository, a WebDAV client is required to use the TLS v1.2 protocol.

3 - Standard Installation

In this section

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Installing a New Server

Prerequisites:

- Before installing Spectrum Technology Platform, be sure to read the Release Notes. The Release Notes contains important compatibility information as well as release-specific installation notes.
- Apply all the latest updates available for your operating system, especially those that resolve issues with Java.
- You may encounter installation problems on Windows if the data execution prevention (DEP) setting is not set correctly. The DEP setting must be set to **Turn on DEP for essential Windows programs and services only**. For instructions on how to change your DEP setting, see the Windows documentation.

To install a new server:

1. Download Spectrum Technology Platform using the download instructions contained in your welcome letter.
2. Extract the downloaded file to a temporary location on the server where you want to install Spectrum Technology Platform.
3. Double-click `install.exe`.
4. The installer guides you through the installation process.

Note:

- If you are setting up an environment where the configuration database is installed on a separate server choose **Server only**. Otherwise choose **Standard installation**.
- When prompted, select the modules that you want to install.
 - Make sure that **Spectrum Technology Platform Server** is selected.
 - If you are installing the **SAP**, you must also install Advanced Matching (**Universal Name Data Normalization and Advanced Matching**). **Enterprise Tax** is optional. **Universal Addressing** is only required if you will be using the SAP service `SAPValidateAddressWithCandidates`.
 - If you are installing **Screener**, you must also install these modules: **Data Stewardship**, **Data Integration**, **Context Graph**, **Universal Addressing**, **Universal Name Data Normalization and Advanced Matching**.
- When prompted, enter the HTTP port that you want to use then press **Enter**. The default is 8080. For a complete listing of ports used by Spectrum Technology Platform see [Network Ports](#) on page 32.

5. Wait for the server to start. Unless you are installing a cluster and you cleared the check box to start the server after installation, the Spectrum Technology Platform server starts when the installation is complete.

Important: Do not attempt to stop the server until after it has fully started for the first time. Stopping the server before it performs an initial startup can cause your installation to become unusable.

By default, the Windows Server will not auto start. If you want to enable auto start, click the check box to do so. If you are installing in a clustered environment, you ensure that the check box is NOT selected, or the installation will be invalid. You can see when the server has fully started by opening the log file *SpectrumDirectory\server\logs\spectrum-server.log* and looking for this message:

```
INFO [Server] Spectrum Technology Platform (Version version build)
Started
```

6. Install your license key. For more information, see [Installing a License Key](#) on page 47.
7. Apply all the updates for the platform and any modules you have installed. For a listing of updates, see the [Update Summary](#) page.

Note: Further module-level configurations might be required in some cases, such as Spectrum Screener. See these details in the Installation section of the respective module guides.

Upgrading a Server

- Before upgrading, be sure to read the release notes for the new version. The release notes contain a list of known issues, important compatibility information, supported upgrade paths, and module-specific data backup recommendations.
- Apply all the latest updates available for your operating system, especially those that resolve issues with Java.
- Install all patches and updates in an earlier version of Spectrum Technology Platform before you upgrade to Spectrum Technology Platform 2020.1.0
- **Important:** We recommend that you create a backup before upgrading so that if an error occurs during the upgrade you can recover your flows, security settings, and other settings and customizations, if an error occurs during the upgrade process.

To retain customized settings in the *wrapper.conf* file located in the *SpectrumDirectory/server/bin/wrapper* directory, you will need to compare the contents of *wrapper.conf* installed during the upgrade with the contents of the backed up copy of the file. You can then manually copy customizations that you want to retain after the upgrade into the updated version of the file. This is particularly important for changes to the initial and maximum Java heap sizes.

This procedure is for upgrading a single Spectrum Technology Platform server. Follow this procedure when upgrading a standard installation or when upgrading a node in a cluster. If you are upgrading

a cluster, be sure to follow the cluster upgrade process. For more information, see [Upgrading a Cluster](#) on page 65.

If you upgrade the main server and start it before upgrading and starting the nodes, you will need to recreate your connections in Management console after upgrading.

1. Download the updated version of Spectrum Technology Platform using the download instructions contained in the release announcement email.
2. Unzip the downloaded installer to a temporary folder on the server you want to upgrade.
3. Back up the server. For instructions on creating a backup, see the *Administration Guide*.
4. Back up module-specific data for any of these modules if you have them installed.

Note: For Screener, see the section [Upgrading Screener](#) in the Screener guide.

| Module | Items to Back Up |
|---|--|
| Advanced Matching, Data Normalization, and Universal Name | <p>Back up the contents of these subfolders located in <code>SpectrumDirectory/server/modules</code>:</p> <ul style="list-style-type: none"> • <code>cdqdb</code> • <code>lucene</code> • <code>matcher</code> • <code>parser</code> • <code>searchindex</code> • <code>tables</code> |
| Context Graph | <p>Open the Relationship Analysis Client and click Manage. Select the model you want to back up then click Backup. You can also perform Context Graph backups with CLI commands.</p> <p>In addition to backing up your models, back up these two property files:</p> <ul style="list-style-type: none"> • <code>server\modules\hub\hub.properties</code> • <code>server\modules\hub\db\neo4j.properties</code> |
| Spatial | <p>Back up your named resources, data, and configuration files.</p> |

5. Optional: If you have customized settings that you want to retain in `wrapper.conf` located in the `SpectrumDirectory/server/bin/wrapper` directory, copy the customized file to a separate location.

The upgrade does not retain changes to settings in this file. This is particularly important for changes to the initial and maximum Java heap sizes.

6. (Optional) You can reduce the time it takes to upgrade your system by purging old records from the execution history. Consider purging the execution history if it contains over 100,000 entries. You can view your execution history in Enterprise Designer under **View > Execution History**.

If you are upgrading from version 12.0 SP1, 12.0 SP2, 12.0 SP2.1 18.2, or 19.1 use the JMX console to delete old history records. This process is faster than manually deleting records in Management Console, and is available on versions 12.0 SP1, 12.0 SP2, 12.0 SP2.1, 18.2, and 19.1. For more information, see [Purging Execution History](#) on page 45.

7. Stop the Spectrum Technology Platform server.

To stop the server, right-click the Spectrum Technology Platform icon in the Windows system tray and click **Stop Spectrum**.

8. Wait for the server to finish the shutdown process before proceeding.

Important: If you have Context Graph installed, make sure that all models are stopped. Models that do not shut down properly will not open successfully after upgrading.

9. If you have Global Sentry installed, stop the Global Sentry database server by going to the Windows services control panel and stopping the Global Sentry Database Server service.
10. Run the Spectrum Technology Platform installer to upgrade your system.
11. Apply all the updates for the platform and any modules you have installed. For a listing of updates, see [Spectrum Technology Platform Updates](#).

Note: Any job or subflow stored in the system during a server upgrade is marked as exposed to provide the same behavior for those jobs and subflows as before the upgrade. Any job or subflow that is exported prior to the upgrade will not be exposed. Therefore, when importing these jobs or subflows back into the system, you must manually expose the imported job or subflow.

Some modules have post-upgrade steps you need to perform.

Context Graph

Open this file in a text editor:

`server/modules/hub/db/neo4j.properties` and set this property to true: `dbms.allow_upgrade=true`. This property protects against unintentional and irreversible store upgrades. Setting this property to "true" indicates that you understand the ramifications of proceeding with an upgrade and have taken the necessary precautions before proceeding.

Restart the Spectrum Technology Platform server. The server will upgrade each model. Examine the file `server/logs/spectrum-server.log` for errors or warning messages. Once all models have been upgraded, edit the `neo4j.properties` file again and comment out the `dbms.allow_upgrade` property.

| | |
|-------------------|---|
| Spatial | During an upgrade, the pool size is reset to 4 if set to a lower value. A pool size setting of 4 or more is unaffected. To change the Remote Component Pool Size value after upgrading, open the Management Console and select Resources > Spatial . Change the pool size value and click Save . For details, see <i>Modifying the Pool Size</i> in the <i>Spectrum Spatial Guide</i> . |
| Spectrum Screener | See the Upgrading Screener section of the Screener guide for details. |

Purging Execution History

If you have many flows, or services that are used frequently, the execution history in Spectrum Management Console can become quite large. This procedure describes how to remove old records from the execution history. You may want to purge old records to reduce the size of the configuration database. Purging records before upgrading to a new version can help reduce the time it takes to upgrade Spectrum Technology Platform.

There are two purge methods:

- Purge records:

```
com.pb.spectrum.platform.configuration:manager=ArchiveTransactionManager
```

- Purge records and provide archive status:

```
com.pb.spectrum.platform.transaction:manager=archiveTransactionManager
```

The steps below demonstrate the "purge records" (non-archive status) request.

Note: To purge execution history for all nodes on a cluster, perform the purge on each node individually.

1. Open a web browser and go to `http://server:port/jmx-console`

Where:

server is the IP address or host name of your Spectrum Technology Platform server.

port is the HTTP port used by Spectrum Technology Platform. The default is 8080.

2. Under **Domain: com.pb.spectrum.platform.configuration**, click **com.pb.spectrum.platform.configuration:manager=ArchiveConfigurationManager**.

3. Optional: If you want to save an archive of the history that you are going to purge, specify the path where you want to save the archive in the **ArchiveDirectory** field, then click **set**. Then, set **ArchiveEnabled** to **true** and click **set**.
4. In the **ArchiveRetain** field, specify how many days of records you want to keep in the history then click **set**.
For example, if you enter 45 then history records that are 45 days old or newer will be retained, and records 46 days old and older will be purged. To determine how many days of records you can retain, look at the job and process flow history in Spectrum Enterprise Designer and identify the point in time where the number of records exceeds 100,000.
5. Optional: If you want to schedule a purge to occur on a regular schedule, enter the schedule in the **CronExpression** field using a Cron expression.

A cron expression consists of six space-separated values, with an optional seventh value:

Seconds
Minutes
Hours
Day of the month
Month
Day of the week
Year (Optional)

For example, this expression would purge the execution history at midnight every Sunday:

```
0 0 0 ? * SUN
```

For more information about cron expressions, see quartz-scheduler.org/documentation.

After specifying a cron expression, click the **set** button next to the **CronExpression** field, set **PurgeEnabled** to **true**, and click the **set** button next to the **PurgeEnabled** field.

Note: You do not need to schedule purges if you want to purge the history only one time for the purposes of speeding up the upgrade process.

6. Optional: If you want to set a maximum number of records to remain in the history after the purge, specify the maximum number of records in the **MaxHistoryRecordCount** field.
This is useful if you have a large number of history records each day, and even after purging old records based on the value in the **ArchiveRetain** field, the size of the execution history is still larger than you want. After purging the old records based on the value in the **ArchiveRetain** field, additional records will be purged until the number of records that remains is equal to the number in the **MaxHistoryRecordCount** field. If you do not want to specify a maximum number of history records, specify -1.

Note: The limit you specify in **MaxHistoryRecordCount** sets the limits for process flows and jobs separately. For example, if you specify 5000, the maximum number of process flow history records will be 5,000, and the maximum number of job history records will be 5,000, for a total maximum number of 10,000 records.

7. In the **PurgeOperation** field, leave the value set to `ALL`.
8. Select **All MBeans** to return to the main JMX Console screen.
9. Under **Domain: com.pb.spectrum.platform.configuration**, select **com.pb.spectrum.platform.transaction:manager=ArchiveTransactionManager**.
10. To run the purge, click **Invoke**.

This purges the execution history so that you now have a smaller configuration database.

Installing a License Key

The license key provides access to software pursuant to the terms of your license. It is an encrypted XML file with a file name ending in `.key`.

Note: When you upgrade an existing Spectrum Technology Platform installation, you may continue to use your existing license key. You do not need to get a new one.

To install a license key:

1. Locate the email containing your license key that you received from Precisely.
Important: You must install the license key within 45 days of receiving it. If you do not you will need to contact Precisely for another license key.
2. Copy the `.key` file to this directory:

`SpectrumPlatformLocation\server\import`

The license key is applied to your system. There is no need to restart your server.

If there was a problem installing the license key, check the log file in:

`SpectrumDirectory\server\logs`

Depending on whether the key was processed successfully or there was an error processing the key, the processed key goes into one of these folders:

- `SpectrumDirectory\server\archive\license-keys`
- `SpectrumDirectory\import\error\license-keys`

Installing the Server with a Silent Installer

The silent install process for the server allows you to preconfigure the server installation process so that it runs without user intervention.

To configure a silent install, you specify settings for installer options, such as the installation location and which modules to install, in a properties file, which the installer refers to instead prompting the user.

1. In the Spectrum Technology Platform installer, go to the folder `SilentInstaller`.
2. Open the file `installer.properties` in a text editor.
3. Edit `installer.properties` as necessary to specify the installation settings you want to use. See the comments in `installer.properties` for additional information.
4. To run the installer in silent mode, place `installer.properties` in the same directory as `install.exe`. When the installer runs it will detect `installer.properties` and automatically run in silent mode.

Alternatively, you can place `installer.properties` in different directory and give the absolute path to the property in the command prompt using the `-f` argument, as follows:

```
install.exe -f PathOfPropertyFile\installer.properties
```

Adding Modules

Spectrum Technology Platform is designed so that modules can be added as you grow your system over time. For example, you may have one Spectrum Technology Platform module, then license another module a few months later. The second product may be built on a newer version of Spectrum Technology Platform. This will require you to upgrade your version of Spectrum Technology Platform. In another case, the second product is compatible with the installed version. In both cases, the install program recognizes if it needs to upgrade Spectrum Technology Platform and will do so without prompting. If an upgrade is not required, the installer will skip the Spectrum Technology Platform install steps and install the new module.

The process for adding a module is similar to that of a new installation. In both cases you start the installation process by running the Spectrum Technology Platform installer. Note that Spectrum Technology Platform modules do not have their own installer. Instead, you use the Spectrum Technology Platform installer to add modules.

1. Stop the Spectrum Technology Platform server.

To stop the server, right-click the Spectrum Technology Platform icon in the Windows system tray (shown below) and click **Stop Spectrum**.

2. Launch the Spectrum Technology Platform installer by double-clicking `Install.exe`.
The installer guides you through the installation process. When prompted, select modules that you want to install. Your currently installed modules are initially selected.
3. Install any necessary databases for the new product. For more information about installing databases, see [Spectrum Databases](#) on page 96.
4. After you install the necessary databases (if any), start the Spectrum Technology Platform server.
To start the server, right-click the Spectrum Technology Platform icon in the Windows system tray and select **Start Spectrum**.
5. Install the license key for the module. For more information, see [Installing a License Key](#) on page 47.

Removing the Server

Before uninstalling any product, back up any files you may need in the future. Uninstalling Spectrum Technology Platform will remove all jobs and settings.

1. Stop the Spectrum Technology Platform server.
To stop the server, right-click the Spectrum Technology Platform icon in the Windows system tray (shown below) and select **Stop Spectrum**.
2. Click **Start > Programs > Precisely > Spectrum Technology Platform > Server** and click **Uninstall Precisely Spectrum Technology Platform**.

Note: Some Java files will not be removed because the uninstall process itself uses them.

4 - Cluster

In this section

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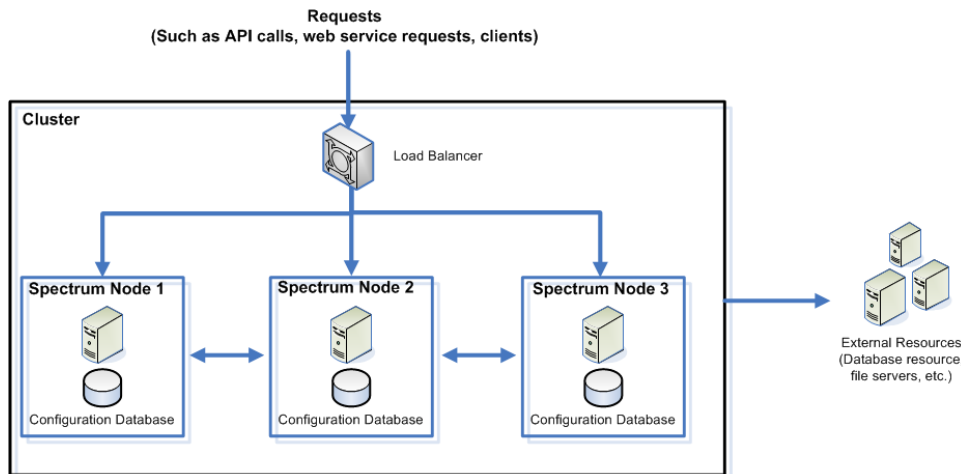


Clustered Architecture

In a clustered environment, processing is shared among two or more instances of the server. All communication with Spectrum Technology Platform goes through a load balancer. Instead of using the URL and port of the Spectrum Technology Platform server, you use the URL and port of the load balancer. Consider using this approach if you require failover redundancy and high-volume, high-performance processing.

Important: As part of your cluster setup and machine preparation, ensure that all system times are synchronized across all nodes in the cluster.

This diagram illustrates the cluster architecture:



Load Balancer

As requests come into the cluster, the load balancer identifies the best available Spectrum Technology Platform node to handle the request. The request is then passed to a Spectrum Technology Platform node.

From the user's perspective, the distributed architecture is handled automatically behind the scenes. The user sends a request to the load balancer URL and port for Spectrum Technology Platform (typically port 80 for a distributed environment) as if it were a single Spectrum Technology Platform server.

Nodes

A node is a Spectrum Technology Platform server installation. Each node has a copy of the configuration database. Each copy is continuously synchronized. This enables each node to share the same settings, such as license information, dataflows, and database resources.

To configure the cluster, simply point Management Console or Enterprise Designer to the load balancer URL and port for Spectrum Technology Platform (typically port 80 for a distributed environment).

External Resources

The definitions for external resources such as database resources (postal databases and geocoding databases for example), JDBC connections, and file servers, reside in the configuration database. The resources themselves (databases, files, web services) can reside anywhere you choose. Database resources can be installed either on each node in the cluster or on a shared network location.

Because the database resources themselves reside outside the cluster, multiple clusters can share the same database resources. You must create the resource definitions in each cluster using Management Console. For example if you want multiple clusters to share the same geocoding database, you can install the geocoding database on a server accessible from each cluster, then in Management Console point each cluster to the geocoding database.

Installing a Cluster

See [Installing a Cluster](#) on page 56 for more information.

Clustered Architecture for Context Graph

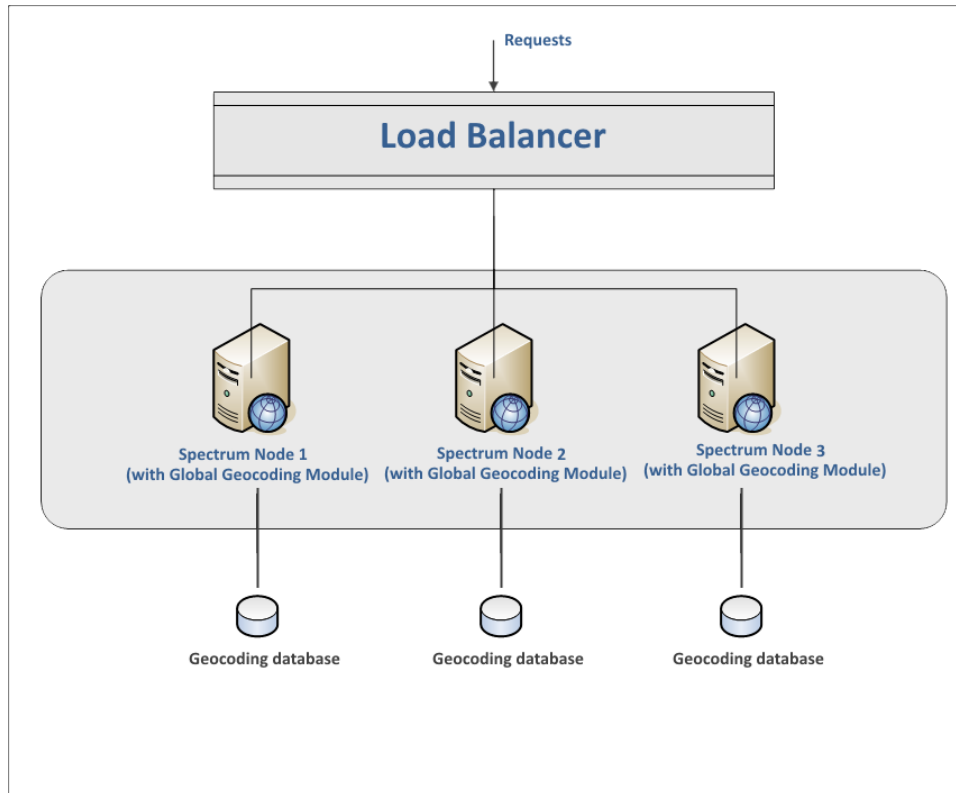
In a clustered environment, Context Graph graph databases are replicated to each Spectrum Technology Platform server in the cluster. The server that receives the first request to open a model is the master. All other servers maintain a replicated mirror of that master. If different servers receive requests to open different models, the masters for the models are on different servers. All writes to the database are synchronized with the master. Any server can process read requests.

We recommend that clusters have a minimum of three servers in order to achieve a level of fault tolerance. Also, an odd number of servers provides better individual server resiliency than an even-numbered cluster. We make these recommendations because once the model is running, the system will continue running as long as more than half the servers are in communication. For example, in a cluster of six servers, four must stay in communication; for a cluster of three servers, two must stay in communication, and for a cluster of two servers, all servers must be in communication. Both a three-server cluster and a four-server cluster can tolerate a maximum of one lost server.

All servers in the cluster must be available in order to open or create a model. If any server is unavailable, the server will wait for all servers to join the cluster. If this number of servers do not join within the timeout period, the operation fails.

Clustered Architecture for Global Geocoding

In a clustered environment, processing is shared among two or more instances of the server. The diagram below illustrates the deployment architecture of such a configuration. Load balancing can be used to support high availability and scaling. The deployment architecture includes a load balancer, Spectrum Technology Platform nodes with Global Geocoding and Geocoding databases.



Note: Each Geocoding database **MUST** be installed in the same location on all of the nodes for the cluster to work properly. For example, if the Geocoding database for "Spectrum Node 1" is installed on `C:\data\`, then the other Spectrum nodes' Geocoding database must also reside on `C:\data\`.

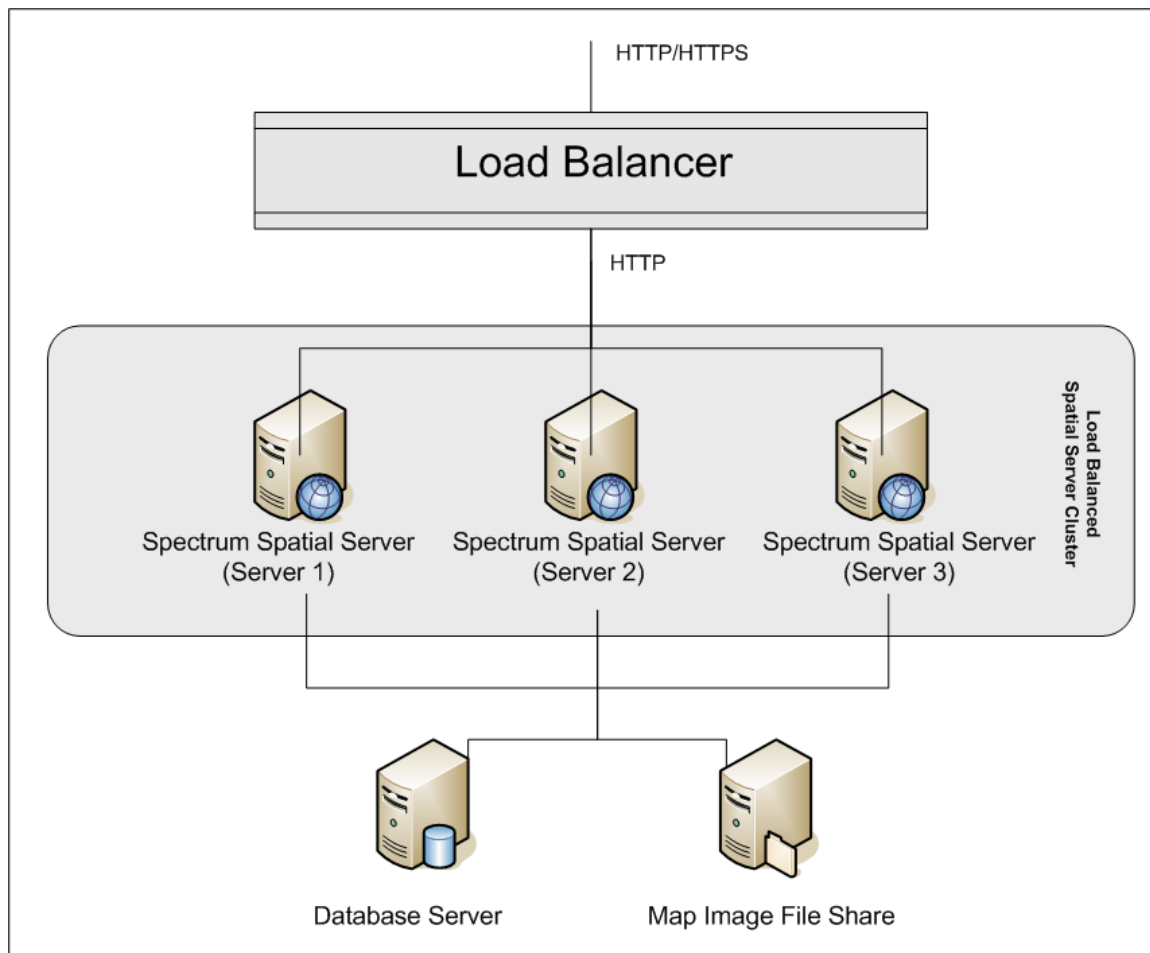
Clustered Architecture for Spatial

In a clustered environment, processing is shared among two or more instances of the server. The diagram below illustrates the deployment architecture of such a configuration. Load balancing can be used to support high availability and scaling. The deployment architecture includes a load balancer,

a cluster, a database, and a file share. With this approach it is possible to scale both horizontally and vertically. You can cluster Spatial with or without platform clustering.

Note: Setting up both a Spectrum Technology Platform cluster and a Spatial cluster is recommended and has several benefits:

- Security (ACL) synchronization happens automatically for named resources .
- Dataflows, users, and roles created on one node will automatically synchronize to all nodes.
- All Spatial demo pages and utilities (such as Spectrum Spatial Manager) can and should point to the load balancer.



Load Balancer

The load balancer spreads requests between the instances. Any load balancer that supports load balancing HTTP/HTTPS requests can be used.

Cluster

The cluster is a collection of Spectrum instances with Spatial sharing administration, named resources, geographical metadata content and configuration settings. Additional nodes can be added to the cluster for resilience or to deliver support for greater loads. Each node can be scaled vertically through additional hardware resources and/or additional instances should this be required for hardware with massive resources. Spectrum can be configured to use restricted numbers of CPUs.

Database

Spectrum stores named resources (maps, layers, tables and styles), geographic metadata and configuration in a repository. In the default single server installation an embedded database is used to store these resources on the local server. To create a resilient scalable solution this embedded database should be replaced with a resilient independent database. Oracle, PostGreSQL/PostGIS and Microsoft SQL Server are the supported repository databases.

In the load balanced configuration, Spectrum nodes cache these resources in a local cache and search index in each node in the cluster. When a Spectrum node receives a request it uses the local cache and index to find resources. Named resources can be added through any node in the cluster. Each node keeps its cache current by checking for differences between its local cache and the central database. This check occurs every 2 seconds by default. Time frequency can be configured. This architecture ensures the server delivers high performance transactions and the load on the repository database is kept to a minimum. If a new Spectrum node is added to the cluster the cache and index are created automatically. Such a scenario can occur to remedy a node failure or grow the capability of the deployment.

File Share

The file share provides a folder to hold map images generated by Spectrum. When maps are rendered using the web services the server supports the map images being returned through URLs or returned as a base 64 encoded image. When a URL is returned the map image is stored as a file and served on request of the URL. To ensure any Spectrum node can return the map image a file share is used to store the images.

Requirements

- A cluster should consist of at least three nodes.
- All servers that host a node must have their system clocks synchronized in order for the cluster to function. Verify that all systems point to the same time service to synchronize their clocks.
- All nodes in a cluster must be the same version of Spectrum Technology Platform so be sure that the version you install is the same as the existing nodes.

- All nodes in a cluster must have the same modules installed.

Installing a Cluster

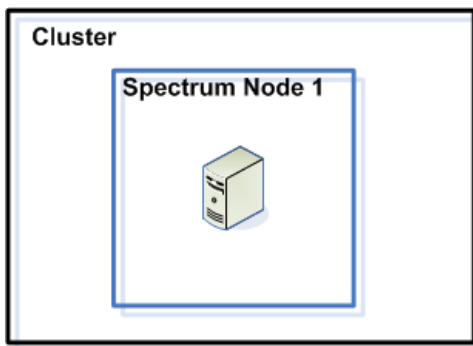
Installing a cluster involves setting up one Spectrum Technology Platform server at a time.

Each time you add a server you need to point it to an existing server which will act as a seed node. A *seed node* is a server that has a copy of the Spectrum configuration data that it can copy to a new node so that the new node's configuration is synchronized with the other nodes in the cluster.

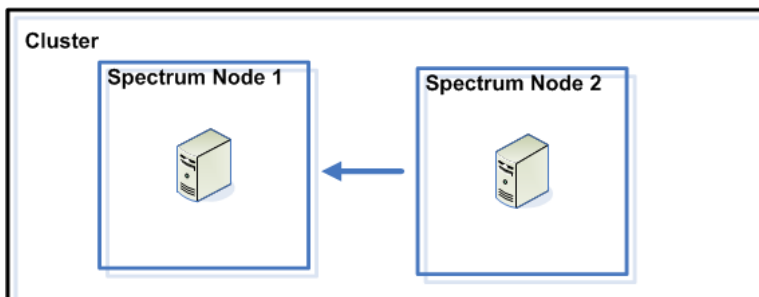
Note: All similar nodes should contain all seed addresses. In a combined installation, where the product server and repository are located on the same physical or virtual machine, the seeds would be identical. However, in a separated installation, where the product server and repository server are on separate physical or virtual machines, the server nodes would contain only server seeds and the repository would contain only repository seeds.

The following diagrams illustrate this process.

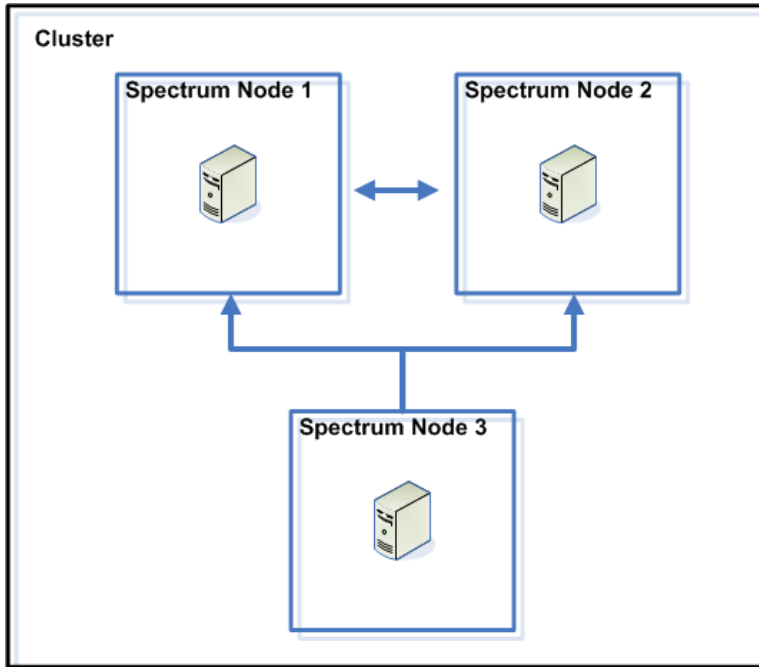
After installing the first node you will, in effect, have a cluster with only one node:



When you install the second node it must point to the first node as a seed node. This will enable the second node to receive a copy of the first node's configuration database, resulting in a cluster with two nodes with synchronized configuration information.



As you add additional nodes, the new nodes can point to any of the existing nodes as a seed node. You must also configure the first node to point to at least one other node in the cluster so that if it is ever brought down it can rejoin the cluster.



Before you begin, install an appropriate load balancer. Follow the procedures described in the load balancer documentation when installing.

Note: The load balancer must be configured to allow encoded forward slashes. If the load balancer does not allow encoded forward slashes you may get HTTP 404 errors while using the cluster. For example, if you are using an Apache load balancer, you can configure it to allow encoded forward slashes by opening the `httpd.conf` file and specifying this property: `AllowEncodedSlashes On`. For other types of load balancers, refer to the load balancer documentation.

Once you have your load balancer installed, follow these steps to install nodes in the cluster.

1. Install Spectrum Technology Platform on a server where you want to host a node. For instructions, see [Installing a New Server](#) on page 41.

Important: The installer will provide the option to auto start Spectrum Technology Platform server. By default this option is not selected. Do not enable this option if installing a clustered environment.

2. Configure the properties files.
 - a) Edit the properties in file `server/conf/spectrum-container.properties`, as described in [Cluster Properties](#) on page 59.
 - b) Save and close the `spectrum-container.properties` file.

- c) Some modules have module-specific settings that you must configure to enable the module to work in a cluster.

| Module | Cluster Configuration Settings |
|-------------------|---|
| Advanced Matching | <p>These settings configure clustering for full-text search indexes. If you do not use full-text search indexes you do not need to configure these settings.</p> <p>Open this file in a text editor:</p> <pre>..\server\modules\searchindex\es-container.properties</pre> <p>Configure these properties:</p> <p>es.index.default_number_of_replicas Enter the number of additional copies you want created for each search index. This number should be the number of nodes in your cluster minus 1. For example, if your cluster has five nodes, you would enter "4" in this property.</p> <p>es.index.default_number_of_shards Enter the number of shards you want your index to have in the distributed environment. The more nodes that are in your cluster, the higher this number should be.</p> <p>Save and close <code>es-container.properties</code> when you are done editing these properties.</p> |

| Module | Cluster Configuration Settings |
|---------------|--|
| Context Graph | <p>Open this file in a text editor:</p> <pre>..\server\modules\hub\hub.properties</pre> <p>Configure these properties:</p> <p>hub.models.path.base Specifies the folder where models are stored. By default, each model is placed in a subdirectory under the <code>..\server\modules\hub\db</code> folder. If you want to store models in a different location, uncomment this property and specify the folder where you want to store models.</p> <p>hub.neo4j.database.type Change the value of this property to <code>ha</code>. The default value embedded is for non-clustered installations.</p> <p>hub.servers.per.cluster Uncomment this line. Set the value of this property to the number of Spectrum Technology Platform servers in the cluster.</p> <p>Save and close <code>hub.properties</code> when you are done editing these properties.</p> <p>The <code>..\server\modules\hub\db\neo4j.properties</code> controls how the graph databases are configured, using Neo4j Enterprise. This file is used as a template for each model. If needed, each model can be configured separately by placing a copy of the <code>neo4j.properties</code> file into the store directory for that model.</p> |

3. Start the server.
To start the server, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Start Server**.
4. Repeat this procedure to install additional nodes in the cluster.
5. After installing all the nodes, go back to the first node and add the other nodes as seed nodes.
 - a) On the first node you installed, open the properties file `server/conf/spectrum-container.properties`.
 - b) In the property `spectrum.cluster.seeds`, add the host name or IP address of the other nodes in the cluster, separating each with a comma: `ipaddress1, ipaddress2,...,ipaddressn`
 - c) Save and close the `spectrum-container.properties` file. You do not need to restart the server.

Cluster Properties

The `spectrum-container.properties` file contains the properties that configure a cluster. This table describes how to set the cluster properties for a cluster where the server and configuration

database are installed together on each node, and for nodes in the server cluster in a separated configuration database installation. If you are setting up a configuration database cluster, see [Cluster Properties for a Configuration Database Cluster](#) on page 82.

| Property | Description |
|--|--|
| <code>spectrum.cluster.enabled</code> | Indicates whether a clustered configuration is used. Set this to true. |
| <code>spectrum.cluster.name</code> | <p>If this is the first node in the cluster, set this to the name you want to give to the cluster.</p> <p>If this is not the first node in the cluster, set this to the name of the cluster that you want this node to join. If you are unsure of the cluster name, check the <code>spectrum.cluster.name</code> property on another node in the cluster.</p> |
| <code>spectrum.cluster.seeds</code> | List the IP address and host name for all seeds of the cluster. For example, if your configuration includes three nodes, list <i>Node1IPorHostName</i> , <i>Node2IPorHostName</i> , <i>Node3IPorHostName</i> . |
| <code>spectrum.cluster.nodeID</code> | <p>Set this to an integer value to use as the ID for this node. The ID must be an integer and must be unique among all nodes in the cluster.</p> <p>Tip: We recommend that the first node you install have a node ID of 1, the second one 2, and so on.</p> |
| <code>spectrum.runtime.hostname</code> | Un-comment this property and set this property to the load balancer host name. |
| <code>spectrum.runtime.port</code> | Un-comment this property and set this property to the port on which you have configured the load balancer to listen. |
| <code>spectrum.repository.addresses</code> | <p>Note: This property can be commented out, unless a distributed installation is used. For distributed installations, this property must point to all repository nodes.</p> <p>For clustered standard installations, in which the repository is embedded on the server machine, define this property with each node's IP address. Separate each IP address with a comma. For example, in a three-node cluster, you would specify: <code>spectrum.repository.addresses=node1-IPaddress,node2-IPaddress,node3-IPaddress</code></p> <p>In distributed clustered configurations, with separate clusters of servers and repositories, on different machines, specify the IP addresses of each node in the configuration database cluster. Separate each IP address with a comma. For example, in a three-node database cluster, you would specify: <code>spectrum.repository.addresses=dbNode1-IPaddress,dbNode2-IPaddress,dbNode3-IPaddress</code></p> |

Installing a Cluster for Spatial

To set up a cluster for Spatial, you must first configure a common repository (depending on the type of database you have) then configure your system to prepare it for clustering.

Note: Setting up both a Spectrum Technology Platform cluster and a Spatial cluster is recommended and has several benefits:

- Security (ACL) synchronization happens automatically for named resources .
- Dataflows, users, and roles created on one node will automatically synchronize to all nodes.
- All Spatial demo pages and utilities (such as Spectrum Spatial Manager) can and should point to the load balancer.

Setting Up a Common Repository Database

You must configure Spatial to use a common repository database for the cluster. This ensures that named resources, geographic metadata and configuration settings are managed across the cluster.

The repository is installed with a set of named resources, geographic metadata and configuration files. To migrate these resources to the common database repository the resources need to be exported from the default internal repository database and reimported into the new shared repository database.

For bulk export and import of repository content, use the `limrepo import` and `limrepo export` commands in the Administration Utility. These commands give you the option of preserving permissions (see the Administration section of the *Guide* for instructions.)

These steps describe how to set up your repository on a common database, either PostgreSQL, Oracle, or Microsoft SQL Server:

1. Export all repository resources to a local folder using the `limrepo export` command in the Administration Utility.

For instructions, see the Administration section of the *Guide*.

The contents of the installed repository must be exported. This step only needs to be performed once, as the contents of the repository should be the same at this point for all instances of Spectrum Technology Platform.

2. Stop the Spectrum Technology Platform server on all nodes.
For instructions, see [Stopping a Cluster](#) on page 75.
3. On all nodes of the Spectrum Technology Platform modify the configuration to specify the common database.

- a) Copy the contents of `repository.databaseType.xml` to `repository.xml` located under the `server/modules/spatial/jackrabbit` folder where `databaseType` is the appropriate type for your database (postgres, oracle, or mssql).
 - b) In `repository.xml`:
 - Modify the `DataSource` section with the server host name, port, database, user, and password.
 - Modify the `Cluster` section to assign a distinct cluster ID, like `Node1`. Ensure unique IDs are assigned to every subsequent node in the cluster (for example, `Node2`, `Node3`).
 - Save the changes to `repository.xml`.
 - c) Remove these folders from the `/server/modules/spatial/jackrabbit` folder: `repository`, `version`, `workspaces`.
4. If your database has previously contained any repository content, you must remove these tables to create a clean repository:
- `default_binval`
 - `default_bundle`
 - `default_names`
 - `default_refs`
 - `rep_fsentry`
 - `rep_global_revision`
 - `rep_journal`
 - `rep_local_revisions`
 - `security_binval`
 - `security_bundle`
 - `security_names`
 - `security_refs`
 - `version_binval`
 - `version_bundle`
 - `version_names`
 - `version_refs`

If using Oracle, then also delete `version_seq_names_id`, `security_seq_names_id`, and `default_seq_names_id`.

5. On the seed node only, import the backed up repository content.
 - a) Start the Spectrum Technology Platform server.
For instructions, see [Starting a Cluster](#) on page 74.
 - b) Import the contents using the `limrepo import` command, pointing to the seed node.
6. Start the remaining nodes in the cluster.
For instructions, see [Starting a Cluster](#) on page 74.

Configuring Your System

Once the Spectrum Technology Platform is installed and you have configured a common repository, you need to configure your instance before you can replicate it to another virtual machine. If you are not using a virtual machine environment, you will need to perform these steps on each of your Spectrum Technology Platform installations.

Configure the Map File Share

To configure the map file share (a shared image folder) to Spectrum Technology Platform, you first need a shared map image directory.

Note: To create a Windows map file share, see [Creating a Map Image File Share on Windows](#) on page 64.

Once a map image directory has been created, configure the map file share:

Modify the Mapping Service configuration by pointing to a shared image folder and load balance server. In the ImageCache change the Directory parameter to a common image directory, and change the AccessBaseURL parameter to the load balancer machine image URL.

If you are using a virtual machine environment, remember this IP address, as you must set the load balancer VM to this IP address.

For Windows installations:

```
<ImageCache>
<Directory>\\server\Share\images</Directory>
<AccessBaseURL>http://<loadbalance_IP_address>/rest/Spatial/MappingService/
internal/imageCache
</AccessBaseURL>
  <FileExpire>30</FileExpire>
  <ScanInterval>30</ScanInterval>
</ImageCache>
```

Creating a Map Image File Share on Linux

The file share provides a folder to hold map images generated by . Create a shared folder accessible to all Spectrum nodes. The file share is not required if maps are returned from the web services as Base64-encoded images.

To create a map image file share on Linux:

1. Mount a shared folder on each operating system hosting Spectrum. The commands below mount a drive on a Microsoft Windows Server or network drive supporting CIFS.

```
mkdir /mnt/<linux mount>
mount -t cifs //<windows host>/<windows share> /mnt/<linux mount>-o
username=<shareuser>,password=<sharepassword>,domain=<domain>
```

2. Set the image share to load at startup in `/etc/fstab`.

```
//<windows ip address for share>/share /path_to/mount cifs
username=server_user,password=secret,_netdev 0 0
```

Creating a Map Image File Share on Windows

The file share provides a folder to hold map images generated by . Create a shared folder accessible to all Spectrum nodes. The file share is not required if maps are returned from the web services as Base64-encoded images.

To create a map image file share on Windows:

1. In Windows Explorer, select the image folder you want to share.
2. Right-click, then click **Share** or **Share with**.
3. Select the users who will be writing to the image folder. These users must have read/write privileges.

Modifying OGC Service Configurations for Clustering

To ensure clustering works when you have both a Spectrum Technology Platform cluster and a Spatial cluster, changes are required to the Open Geospatial Consortium (OGC) services configuration files using Spectrum Spatial Manager: From the WFS, WMS, and WMTS settings pages, change the online resource (service) URL to the IP address and port of the load balancer. See the *Spectrum Spatial Manager Guide* in the Utilities section of the *Guide* for more information.

Configuring Ports for Multiple Spectrum Instances

If you have multiple Spectrum Technology Platform instances on a single machine, you must change the port numbers for each instance. Change all ports in `SpectrumDirectory/server/conf/spectrum-container.properties` to new port values that are not in use. The HTTP port reflects the port number entered in the installer.

Shared Spectrum Local Data

If you are using TAB file data on the file system, this data needs to be in a shared location accessible by all instances of Spectrum in the load balanced environment. It is also important to note that all named resources in the repository accessing data on the file system should point to this shared location.

Each VM or machine hosting Spectrum needs to have access to the mounted shared drive.

Note: Using named resources that point to database tables do not require a shared drive, as the named resources in the repository do not access the data using a file path; rather they use a named connection to the data in the database.

Upgrading a Cluster

- Before upgrading, be sure to read the release notes for the new version. The release notes contain a list of known issues, important compatibility information, supported upgrade paths, and module-specific data backup recommendations.
- Apply all the latest updates available for your operating system, especially those that resolve issues with Java.
- Install all patches and updates in an earlier version of Spectrum Technology Platform before you upgrade to Spectrum Technology Platform 2020.1.0
- **Important:** We recommend that you create a backup before upgrading so that if an error occurs during the upgrade you can recover your flows, security settings, and other settings and customizations, if an error occurs during the upgrade process.

To retain customized settings in the `wrapper.conf` file located in the `SpectrumDirectory/server/bin/wrapper` directory, you will need to compare the contents of `wrapper.conf` installed during the upgrade with the contents of the backed up copy of the file. You can then manually copy customizations that you want to retain after the upgrade into the updated version of the file. This is particularly important for changes to the initial and maximum Java heap sizes.

This procedure is for upgrading a cluster where the Spectrum Technology Platform server and configuration database are installed on each node of the cluster. To upgrade a cluster, you upgrade one node at a time. The first node you upgrade is handled slightly differently than the other nodes because you must point the node to itself as a seed node since no other nodes will be running in the cluster when it starts up.

Note: These scenarios have special procedures for upgrading a cluster:

| For this scenario... | Use this information... |
|--|---|
| ...separate clusters for server nodes and configuration database nodes | Upgrading a Cluster with a Separated Database on page 83. |
| ...upgrading a cluster for Spatial only | Upgrading a Cluster with Spatial on page 71 |
| ...upgrading both Spectrum and Spatial clusters | Upgrading a Cluster with Spatial on page 71 |

| For this scenario... | Use this information... |
|--|--|
| ...upgrading a cluster running Context Graph | Before shutting down all nodes, see "Upgrading a Cluster with Context Graph" in the <i>Spectrum Installation Guide</i> . |

If the above scenarios do not apply to you, follow this procedure to upgrade your cluster:

You may find it necessary to stop nodes manually, as in the case of applying software updates. When you stop all nodes of the cluster manually, or if all nodes are down, you must start as a new cluster/session. To refresh, start node 1 of the cluster with the **spectrum.cluster.seeds** IP address as node 1's IP address only. Do not include other node's IP address at startup.

1. Back up the server.

For instructions on creating a backup, see the *Administration Guide*.

2. Stop all the nodes in the cluster.

For more information, see [Stopping a Cluster](#) on page 75.

When you stop all nodes of the cluster, manually, or if all nodes are down, you must start as a new cluster/session. To refresh, start node 1 of the cluster with **spectrum.cluster.seeds** IP address as node 1's IP alone. Do not include other nodes' IP addresses when re-starting.

3. On the last node that you stopped:

- a) Open the file `server/conf/spectrum-container.properties` in a text editor.
- b) In the `spectrum.cluster.seeds` property, remove all nodes except for the current node.
- c) Make a note of the nodes you remove so you can add them back later.
- d) Save and close `spectrum-container.properties`.
- e) Upgrade the node.

For more information, see [Upgrading a Server](#) on page 42.

- f) Open the file `spectrum-container.properties` in a text editor and configure the cluster properties.

For more information, see [Cluster Properties](#) on page 59.

Be sure to leave `spectrum.cluster.seeds` set to only the current node's IP address or host name.

Note: Be aware that the container property definitions are dependent upon your server configuration and whether you are running clusters on Neo4j instances. Review the [spectrum.repository.server.cluster.nodeCount](#) property to determine the definitions for your setup.

4. Upgrade each of the other nodes, one at a time.

Attention: Only perform these steps when upgrading nodes other than the first node.

Note: Be sure to back up your server before proceeding. This step is only applicable when upgrading from Spectrum Technology Platform versions 11.1 or older.

- a) Add or ensure that you have set `spectrum.cluster.nodeID`.
Set this to "1" on the first node, and this value will increase for subsequent nodes.
 - b) Delete the following folder, if present:
`SpectrumDirectory\server\repository\store\databases`
 - c) Upgrade the node.
For more information, see [Upgrading a Server](#) on page 42.
 - d) Open the file `spectrum-container.properties` in a text editor and configure the cluster properties.
For more information, see [Cluster Properties](#) on page 59. Save and close the file when you are done.
 - e) Start the Server.
5. After you have upgraded and started all the nodes, go back to the first node you upgraded, open `spectrum-container.properties`, and add the seed nodes you removed from `spectrum.cluster.seeds`.

Upgrading a Cluster with Context Graph

- Before upgrading, be sure to read the release notes for the new version. The release notes contain a list of known issues, important compatibility information, supported upgrade paths, and module-specific data backup recommendations.
- Apply all the latest updates available for your operating system, especially those that resolve issues with Java.
- Install all patches and updates in an earlier version of Spectrum Technology Platform before you upgrade to Spectrum Technology Platform 2020.1.0
- **Important:** We recommend that you create a backup before upgrading so that if an error occurs during the upgrade you can recover your flows, security settings, and other settings and customizations, if an error occurs during the upgrade process.

To retain customized settings in the `wrapper.conf` file located in the `SpectrumDirectory/server/bin/wrapper` directory, you will need to compare the contents of `wrapper.conf` installed during the upgrade with the contents of the backed up copy of the file. You can then manually copy customizations that you want to retain after the upgrade into the updated version of the file. This is particularly important for changes to the initial and maximum Java heap sizes.

In a cluster that runs Context Graph, each node hosts the Spectrum Technology Platform server as well as Context Graph models. When upgrading, you need to upgrade your models in addition to upgrading the Spectrum Technology Platform server.

The upgrade process consists of these steps:

1. Back up your models and properties files.
2. On the master server, upgrade Spectrum Technology Platform then upgrade your models.
3. On each non-master server, upgrade Spectrum Technology Platform then copy the upgraded models from the master server to the non-master server.

To upgrade a cluster that runs Context Graph, follow this procedure:

1. Back up the server. For instructions on creating a backup, see the *Administration Guide*.

Important: We recommend that you create a backup before upgrading so that you can recover your flows, security settings, and other settings, if an error occurs during the upgrade process.

2. Open the Relationship Analysis Client and click **Manage**. Select the model you want to back up then click **Backup**.

In addition to backing up your models, back up these two property files:

- `SpectrumFolder\server\modules\hub\hub.properties`
- `SpectrumFolder\server\modules\hub\db\neo4j.properties`

3. Identify which node is the serving as the master server for Context Graph.

- a) Open a web browser and go to:

`http://LoadBalancer:8080/jmx-console/HttpAdaptor/list`

- b) Scroll down to the **neo4j.org domain**.

You will see a set of objects for each model. The **Role** attribute in the **HighAvailability** object indicates whether a server is the master for a model.

- c) If you have more than one model and each model has a different master, you need to make one server the master of all the models. To do this, restart the cluster then open the Relationship Analysis Client using the hostname or IP address of one of the nodes rather than the load balancer. In the Relationship Analysis Client, open each model by running a query on each model. This will make the server you are connected to the master for each model.

4. Stop each non-master node in the cluster; stop the master server last. Stop nodes one at a time rather than all at once.

Important: Make sure that Spectrum Technology Platform stops without errors. If a server does not stop properly, Context Graph models on the server will not open successfully after upgrading. To ensure that Spectrum Technology Platform stopped cleanly, examine the `SpectrumFolder\server\logs\spectrum-server.log` file for errors during shutdown.

5. Upgrade the master server.

- a) If you are upgrading from Spectrum Technology Platform 12.0 or later, each model directory must contain a `version.data` file. Review all the `model.ModelName` subdirectories located under `SpectrumFolder\server\modules\hub\db` to confirm that they contain a `version.data` file. If any model directory is missing this file, copy the corresponding `version.data` file from one of the non-master nodes.

- b) **Important:** The installer will prompt you to start Spectrum Technology Platform after the installation completes. You must disable this option so that the server does not start automatically when the installation completes.

Run the Spectrum Technology Platform installer to upgrade the master server to the new version of Spectrum Technology Platform.

- c) Open the file `SpectrumFolder\server\modules\hub\hub.properties` in an editor and confirm that the following property is set to embedded:

```
hub.neo4j.database.type=embedded
```

- d) Open the file `SpectrumFolder\server\modules\hub\db\neo4j.properties` in an editor and set the following property to true.

```
dbms.allow_upgrade=true
```

- e) Start the Spectrum Technology Platform server.
- f) Open each model in the Relationship Analysis Client and run a query. Any query is sufficient.
- g) Stop the Spectrum Technology Platform server.
- h) Indexed properties are now restricted to a maximum length of 4036 bytes. If your model has an indexed property that exceeds this limitation, proceed to step 6 on page 69.

If your model does not have an indexed property that exceeds this limitation, continue with substep 5.i on page 69.

- i) Open the `SpectrumFolder\server\modules\hub\hub.properties` file in an editor and set the following properties:

```
hub.neo4j.database.type=ha
hub.servers.per.cluster=must be set to number of servers in the
cluster
```

- j) Compare any properties files that you backed up to the installed files and make any necessary changes. Do not overwrite new files with old files because new files may contain properties that old files do not.
- k) Skip step 6 on page 69 and continue to step 7 on page 70.

6. Indexed properties are now restricted to a maximum length of 4036 bytes. If a model has an indexed property that exceeds this limitation, you will not be able to open that model until you complete the following steps:

- a) Copy the `SpectrumFolder\server\modules\hub\db\neo4j.properties` file to the `SpectrumFolder\server\modules\hub\db\model.ModelName` folder for each model that exceeds the property constraint of 4036 characters.

- b) Open the `neo4j.properties` files that you copied in Step a. In a text editor, uncomment and set `dbms.index.default_schema_provider` to `lucene+native-1.0`. Make sure the `neo4j` store upgrade is uncommented and that the following property is set to true:

```
dbms.allow_upgrade=true
```

- c) Start the Spectrum Technology Platform server.
- d) Remove the `SpectrumFolder\server\modules\hub\db\model.ModelName\neo4j.properties` file in each model folder that had the constraint.

After you remove the files, `native-btree-1.0` indexing will be used by default. We recommend that you fix all models that failed upgrade due to the 4036 indexed property constraint and re-index those models from `Lucerne+native-1.0` indexes to the latest `native-btree-1.0` indexes. See the `hub model reindex` command in the Administration Utility section of the Administration Guide.

- e) Stop the Spectrum Technology Platform server.
- f) Open the `SpectrumFolder\server\modules\hub\hub.properties` file in an editor and set the following property to `ha`:

```
hub.neo4j.database.type=ha
```

- g) Set `hub.servers.per.cluster` to the number of servers in the cluster.
- h) Compare any properties files that you backed up to the installed files and make any necessary changes. Do not overwrite new files with old files because new files may contain properties that old files do not.

7. Upgrade the non-master servers.

- a) Delete the models in the `SpectrumFolder\server\modules\hub\db` directory.

Warning: Do not delete the models from the master server.

- b) **Important:** The installer will prompt you to start Spectrum Technology Platform after the installation completes. You must disable this option so that the server does not start automatically when the installation completes.

On one of the non-master servers, run the Spectrum Technology Platform installer to upgrade it to the new version of Spectrum Technology Platform.

- c) Open the `SpectrumFolder\server\modules\hub\hub.properties` file in an editor and confirm that the following properties are set:

```
hub.neo4j.database.type=ha
hub.servers.per.cluster=must be set to number of servers in cluster
```

- d) Compare any properties files that you backed up to the installed files and make any necessary changes. Do not overwrite new files with old files because new files may contain properties that old files do not.

- e) Copy all *SpectrumFolder\server\modules\hub\db\model.ModelName* directories from the master server to the non-master server.
 - f) Repeat these steps for each non-master server in the cluster.
8. Start all nodes in the cluster consecutively after upgrading.
- a) Make sure that you start node 2 within only a few seconds after starting node 1, and repeat this for each remaining node.
 - b) Ensure that each server in the cluster is functioning. Check *SpectrumFolder\server\logs\spectrum-server.log* for any errors.
 - c) While directly connected to the master server (bypassing the load balancer), open each model, one at a time, and inspect the spectrum-server.log file for errors.

Upgrading a Cluster with Spatial

When a common repository database is used for clustering, these additional steps are required before and after the Spectrum Technology Platform upgrade process. This upgrade process must be followed even if you have a single node with a common repository database.

Before the upgrade, you must move to a local database setup; after the upgrade, you then change back to the cluster setup by pointing *repository.xml* to the external database.

Note: To preserve access control settings, use the Administration Utility instead of WebDAV. See the Administration section of the *Spectrum Spatial Guide* for instructions on using the *limrepo* commands in the Administration Utility.

1. Before upgrading Spectrum Technology Platform, back up the repository by following these steps.
 - a) Select a node from the cluster. This will be the seed node (see [Installing a Cluster](#) on page 56).
 - b) Back up the repository content using the Administration Utility's *limrepo export* command with ACL, pointing to the seed node.
 - c) Back up the *Spectrum\server\modules\spatial\jackrabbit* folder to a location outside the installation folder.
2. Switch the common repository database to a local database (temporarily, just for upgrade purposes). Apply these steps to all nodes in the cluster.
 - a) Stop the Spectrum Technology Platform server on all nodes (for instructions, see [Stopping a Cluster](#) on page 75).
 - b) Delete the repository, version, workspaces folders and the *lock.properties* file (if available) from the jackrabbit folder (*Spectrum\server\modules\spatial\jackrabbit*).

- c) Create a backup copy of `repository.xml` and name it `repository-Copy.xml` for example.
 - d) Copy the contents of `repository.standalone.xml` to `repository.xml`.
 - e) Start the Spectrum Technology Platform server on all nodes (for instructions, see [Starting a Cluster](#) on page 74).
 - f) Import the repository content (backed up in Step 1b) into the repository using the `limrepo import` command with ACL for all nodes.
 - g) Stop the Spectrum Technology Platform server.
3. Follow normal procedures in [Upgrading a Cluster](#) on page 65 to upgrade Spectrum Technology Platform to the new version on all nodes.
 4. For the seed node only, after the Spectrum Technology Platform upgrade is complete, back up the upgraded content by following these steps.
 - a) Start the upgraded Spectrum Technology Platform server on the seed node and download the Administration Utility.
 - b) Back up the content from the repository using the `limrepo export` command with ACL by pointing to the seed node.
 - c) Stop the Spectrum Technology Platform server on all nodes (for instructions, see [Stopping a Cluster](#) on page 75).
 - d) On all nodes, back up the upgraded `Spectrum\server\modules\spatial\jackrabbit` folder to a location outside the installation folder.
 5. On all nodes of the Spectrum Technology Platform modify the configuration to specify the common database.
 - a) Restore the backup `repository-Copy.xml` file to `repository.xml`.
 - b) Remove these folders from the `/server/modules/spatial/jackrabbit` folder:
`repository`, `version`, `workspaces`.
 6. If your database has previously contained any repository content, you must remove these tables to create a clean repository:
 - `default_binval`
 - `default_bundle`
 - `default_names`
 - `default_refs`
 - `rep_fsentry`
 - `rep_global_revision`
 - `rep_journal`
 - `rep_local_revisions`
 - `security_binval`
 - `security_bundle`
 - `security_names`
 - `security_refs`
 - `version_binval`
 - `version_bundle`

- version_names
- version_refs

If using Oracle, then also delete `version_seq_names_id`, `security_seq_names_id`, and `default_seq_names_id`.

7. On the seed node only, import the backed up repository content.
 - a) Start the Spectrum Technology Platform server.
For instructions, see [Starting a Cluster](#) on page 74.
 - b) Import the contents using the `limrepo import` command, pointing to the seed node.
8. Start the remaining nodes in the cluster.
For instructions, see [Starting a Cluster](#) on page 74.

Removing a Node from a Cluster

To remove a node from a cluster, stop the Spectrum Technology Platform server.

1. To stop the server, right-click the Spectrum Technology Platform icon in the Windows system tray (shown below) and select **Stop Spectrum**.
2. Stop the node you want to remove:
On Windows, right-click the Spectrum Technology Platform icon in the system tray and select **Stop Spectrum**.
3. Open the file `server/conf/spectrum-container.properties` in a text editor and set `spectrum.cluster.enabled` to `false`.
4. On each of the other nodes in the cluster, open the `spectrum-container.properties` file and remove the node from the `spectrum.cluster.seeds` property.

For Spatial users: If you want to keep the node standalone and able to run outside the cluster, copy back the original `repository.xml` file and remove the following folders from the `/server/modules/spatial/jackrabbit` directory for each instance of Spectrum Technology Platform: `repository`, `version`, `workspaces`. Restart the server and import the repository content.

Adding Nodes to a Cluster

This procedure describes how to add one or more nodes to an existing cluster.

1. Install Spectrum Technology Platform and modules on the server that you want to add to the cluster.
2. Open the following file in a text editor:
`server/conf/spectrum-container.properties`
3. Edit the properties in this file as described in [Cluster Properties](#).
4. Save the file.
5. Open the `server/conf/spectrum-container.properties` on all other servers in the cluster, and in each file add the host name or IP address of the new server added to the cluster (`spectrum.cluster.seeds`).
6. Stop all the Spectrum Technology Platform nodes in the cluster. For more information, see [Stopping a Cluster](#) on page 75. If your cluster has a separated configuration database cluster, you only need to stop the server cluster, not the configuration database cluster.

Warning: To prevent data loss you must stop the cluster by following the procedure described in [Stopping a Cluster](#) on page 75.

7. Start all nodes in the cluster consecutively.

Note: Make sure that you start node 2 within only a few seconds after starting node 1, and repeat this for each remaining node.

Modules

Context Graph

If you are installing Context Graph with a new node that is added to a cluster, open the `SpectrumDirectory/server/modules/hub/hub.properties` file on each node and set the `hub.servers.per.cluster` setting equal to the number of server nodes in the cluster.

Starting a Cluster

These instructions assume that the server is stopped.

If all the nodes in a cluster are stopped, you must follow this procedure to start the cluster safely and avoid data loss.

On the last node that was stopped last, start the server. Do this for each node in the cluster.

Warning: The first node that you start must be the last node that was stopped to preserve the most recent data. Starting another node first may result in loss of data such as job history and configuration settings. If you do not know which node was stopped last, look in each node's log for the time stamp of the shutdown message. You can find the log in:

SpectrumDirectory\server\logs\spectrum-server.log.

- a) Start the server.
- b) Start all nodes consecutively, after upgrading. Make sure that you start node 2 within only a few seconds after starting node 1, and repeat this for each remaining node.

You can tell when the Spectrum Technology Platform server has completely started by looking in the log file: *SpectrumDirectory\server\logs\spectrum-server.log*. This message is displayed when the server is completely started:

```
Precisely Spectrum Technology Platform (Version Version Number)
Started.
```

The log will show the IP address for one of the nodes bound to the Spectrum Technology Platform service.

Stopping a Cluster

To stop an entire cluster:

1. Identify which nodes are seed nodes. To do this, open the file *SpectrumDirectory/server/conf/spectrum-container.properties* and look at the nodes listed in the `spectrum.cluster.seeds` property.
2. Stop each Spectrum Technology Platform server in the cluster, making sure that the last node you stop is a seed node.
3. Right-click the Spectrum Technology Platform icon in the Windows system tray and select **Stop Spectrum**.

Warning: To prevent loss of data when starting the cluster, the first node you start must be the last node that was stopped, and that node must be a seed node.

Using Enterprise Designer with a Cluster

1. Launch Enterprise Designer.
2. In the **Server name** field, enter the server name of the load balancer.

3. In the **Port** field, enter the port that you have configured the load balancer to listen on.

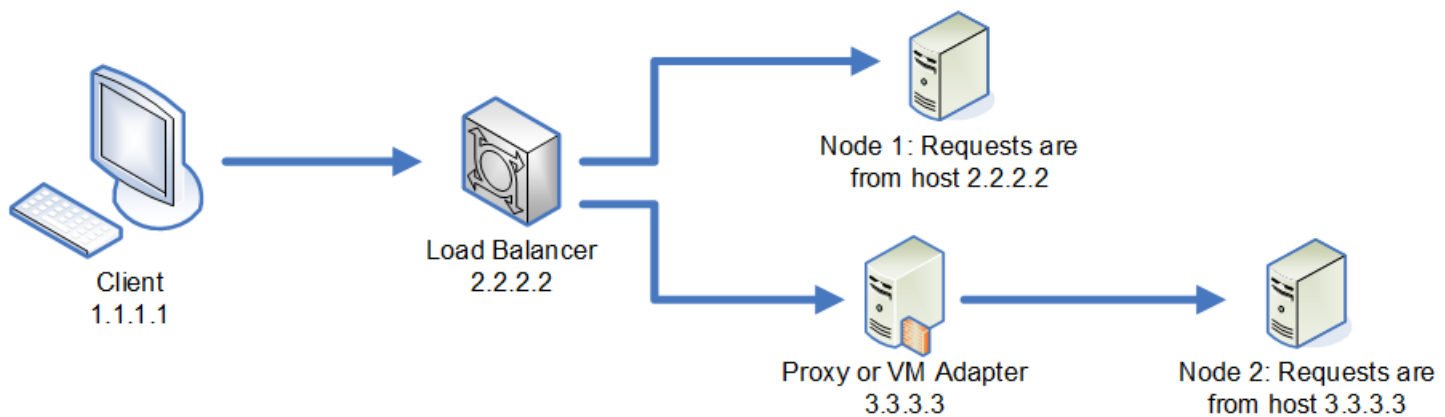
Note: Input files, output files and database resources must be on a shared drive, or file server, or some commonly-accessible location. Otherwise, all files must be loaded on each server that hosts a Spectrum Technology Platform server and must be located in the same path.

Once you have logged in you can use Enterprise Designer as normal. The actions you take will apply to all Spectrum Technology Platform instances in the cluster where you are logged in.

Disabling Host Checks in Token Authentication

In token authentication, the Spectrum Technology Platform server examines the token presented by the client before responding to the request. The server checks the token to see if it has expired, if it is encrypted correctly, and if it is from the correct host. For session tokens, the server also checks the session ID. If any of these checks fail, the token is rejected and the server does not respond to the request.

In a clustered environment, it is possible that requests may be redirected in a way that makes the request appear to be coming from a different host than is specified in the token, resulting in "invalid token" errors. For example, say you have a cluster with two nodes as shown here:



Let's say that the client makes a request and the request is routed to Node 1. A token is created and tied to host 2.2.2.2 (the load balancer) since the node views the request as coming from the load balancer. If the next request from the client is routed to Node 2, the token will still be tied to host 2.2.2.2 but the request will appear to be coming from the proxy server, 3.3.3.3. In this case the node will reject the token because it appears that it is not associated with the host making the request.

In this situation you must configure the Spectrum Technology Platform server to ignore the host information included in the token. This should only be done if you have an environment where there

are different network devices between the load balancer and the nodes. If all nodes are behind the same network device, there is no need to disable the host check.

Note: If you follow this procedure, client tokens become "open" tokens, since the host check is disabled. Session tokens will continue to be associated with a specific session ID, but not with a specific host.

1. Open the following properties file on the Spectrum Technology Platform server:

SpectrumDirectory/server/conf/spectrum-container.properties

2. Set the following property to false.

```
spectrum.security.authentication.token.remoteClientCheck.enabled=false
```

3. Save and close the properties file.
4. Repeat this process on all the nodes in the cluster.

5 - Cluster with Separated Configuration Database

In this section

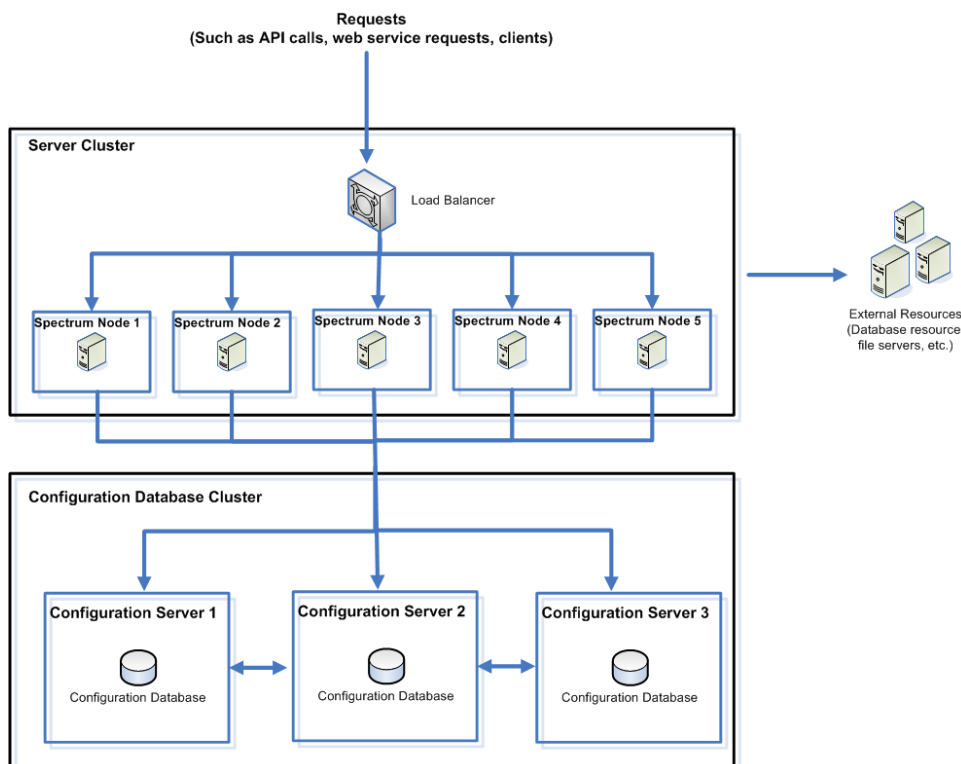
| | |
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Installing a Cluster with a Separated Configuration Database

This procedure creates two clusters: one for the server nodes and one for configuration database nodes. The nodes in the server cluster point to the servers in the configuration database cluster for their configuration data. The nodes in the configuration database cluster replicate their data between each other.

The following diagram illustrates this installation scenario:



To install a separate database repository, you first install the configuration database on servers in a cluster, then install the server on nodes in a separate cluster. At least one configuration database must be running before you can install the server.

Note: In the case of a separated database configuration cluster setup, as shown here, you can apply load balancing only to the Spectrum server cluster. You cannot apply load balancing to the separated database cluster.

1. Place the Spectrum Technology Platform installer on the server where you want to install the configuration database.

2. Double-click `installdb.exe`.
3. Follow the prompts to install the configuration database.

Important: When prompted with the option to start Spectrum Technology Platform after the installation, you must disable this option so that the database does not start automatically when the installation completes.

4. Edit the file `Database/repository/spectrum-container.properties` as described in [Cluster Properties for a Configuration Database Cluster](#) on page 82.
5. Save and close `spectrum-container.properties`.
6. Start the configuration database. To start the configuration database, right-click the Spectrum Technology Platform icon in the Windows system tray and select **Start Spectrum**. Alternatively, you can use the Windows Services control panel to start the configuration database by starting the **Spectrum Database** service.
7. Install the configuration database on additional servers as needed to complete the configuration database cluster.
8. Install the server cluster.
 - a) Install Spectrum Technology Platform on a server where you want to host a node. For instructions, see [Installing a New Server](#) on page 41.

Important: When installing each server select the **Server only** option in the installer and provide the host and port of one or more of the configuration database servers. You can find the port in the file

`SpectrumDirectory\Database\repository\spectrum-container.properties`.
The port is specified in the `spectrum.repository.server.connector.bolt.port` property.

- b) If the Spectrum Technology Platform server is running, stop it. To stop the server, right-click the Spectrum Technology Platform icon in the Windows system tray and select **Stop Spectrum**.
- c) Edit the properties in file `server/conf/spectrum-container.properties`, as described in [Cluster Properties](#) on page 59.
- d) Save and close the `spectrum-container.properties` file.
- e) Some modules have module-specific settings that you must configure to enable the module to work in a cluster.

| Module | Cluster Configuration Settings |
|-------------------|--|
| Advanced Matching | <p>These settings configure clustering for full-text search indexes. If you do not use full-text search indexes you do not need to configure these settings.</p> <p>Open this file in a text editor:</p> <pre>..\server\modules\searchindex\es-container.properties</pre> <p>Configure these properties:</p> <p>es.index.default_number_of_replicas Enter the number of additional copies you want created for each search index. This number should be the number of nodes in your cluster minus 1. For example, if your cluster has five nodes, you would enter "4" in this property.</p> <p>es.index.default_number_of_shards Enter the number of shards you want your index to have in the distributed environment. The more nodes that are in your cluster, the higher this number should be.</p> <p>Save and close <code>es-container.properties</code> when you are done editing these properties.</p> |
| Context Graph | <p>Open this file in a text editor:</p> <pre>..\server\modules\hub\hub.properties</pre> <p>Configure these properties:</p> <p>hub.models.path.base Specifies the folder where models are stored. By default, each model is placed in a subdirectory under the <code>..\server\modules\hub\db</code> folder. If you want to store models in a different location, uncomment this property and specify the folder where you want to store models.</p> <p>hub.neo4j.database.type Change the value of this property to <code>ha</code>. The default value embedded is for non-clustered installations.</p> <p>hub.servers.per.cluster Uncomment this line. Set the value of this property to the number of Spectrum Technology Platform servers in the cluster.</p> <p>Save and close <code>hub.properties</code> when you are done editing these properties.</p> <p>The <code>..\server\modules\hub\db\neo4j.properties</code> controls how the graph databases are configured, using Neo4j Enterprise. This file is used as a template for each model. If needed, each model can be configured separately by placing a copy of the <code>neo4j.properties</code> file into the store directory for that model.</p> |

- f) Start the server. To start the server, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Start Server**.
 - g) Repeat this procedure to install additional nodes in the server cluster.
9. After installing all the nodes in the server cluster, go back to the first node you installed in the server cluster and add the other nodes as seed nodes.
- a) On the first node you installed, open the properties file `server/conf/spectrum-container.properties`.
 - b) In the property `spectrum.cluster.seeds`, add the host name or IP address of the other nodes in the cluster, separating each with a comma.
 - c) Save and close the `spectrum-container.properties` file. You do not need to restart the server.

Cluster Properties for a Configuration Database Cluster

A configuration database cluster is a cluster where each node contains the configuration database only, and not the server. If you are setting up a cluster where the server and configuration database are installed together on each node, or are setting up a server-only cluster, see [Cluster Properties](#) on page 59.

The settings for a configuration database cluster are located in this properties file:

`Database\repository\spectrum-container.properties`

This table describes each property:

| Property | Description |
|---------------------------------------|--|
| <code>spectrum.cluster.enabled</code> | Indicates whether a clustered configuration is used. Set this to true. |
| <code>spectrum.cluster.name</code> | <p>If this is the first node in the cluster, set this to any name you want to give to the configuration database cluster. Be sure that the name is unique if you have multiple clusters.</p> <p>If you are adding a node to an existing cluster, set this to the name of the configuration database cluster that you want this node to join.</p> |

| Property | Description |
|--------------------------------------|---|
| <code>spectrum.cluster.seeds</code> | <p>If you are setting up the first node in the cluster, or if this is the first node you are starting after having stopped the cluster, specify only the host name or IP address of this server. This effectively points this node to itself as a seed node, which is necessary in order for it to be able to start as the first node in the cluster.</p> <p>If this is not the first node in the cluster, specify the host name or IP address of each of the other nodes in the cluster, including nodes that you have not yet installed. Separate each seed node with a comma. When starting up, this property should be set to all nodes in the cluster when cluster.enabled = true.</p> <p>Tip: We recommend that you specify multiple seed nodes so that if one seed node is down others can be used to allow nodes to join the cluster. We also recommend that you specify the same seed nodes in the same order on all nodes in the cluster.</p> |
| <code>spectrum.cluster.nodeID</code> | <p>Set this to an integer value to use as the ID for this node. The ID must be an integer and must be unique among all nodes in the database cluster. For example, you could set the node ID for the first node to 1, the second node's node ID to 2, and the third node's node ID to 3.</p> |

Upgrading a Cluster with a Separated Database

- Before upgrading, be sure to read the release notes for the new version. The release notes contain a list of known issues, important compatibility information, supported upgrade paths, and module-specific data backup recommendations.
- Apply all the latest updates available for your operating system, especially those that resolve issues with Java.
- Install all patches and updates in an earlier version of Spectrum Technology Platform before you upgrade to Spectrum Technology Platform 2020.1.0
- **Important:** We recommend that you create a backup before upgrading so that if an error occurs during the upgrade you can recover your flows, security settings, and other settings and customizations, if an error occurs during the upgrade process.

To retain customized settings in the `wrapper.conf` file located in the `SpectrumDirectory/server/bin/wrapper` directory, you will need to compare the contents of `wrapper.conf` installed during the upgrade with the contents of the backed up copy of the file.

You can then manually copy customizations that you want to retain after the upgrade into the updated version of the file. This is particularly important for changes to the initial and maximum Java heap sizes.

This procedure describes how to upgrade Spectrum Technology Platform when you have separated the configuration database from the server. To upgrade an environment that has a separated configuration database, you first upgrade the configuration database cluster, then the server cluster.

1. Back up the server. For instructions on creating a backup, see the *Administration Guide*.

Important: We recommend that you create a backup before upgrading so that you can recover your flows, security settings, and other settings, if an error occurs during the upgrade process.

2. Back up module-specific data for any of these modules if you have them installed.

Note: For Screener, see the section [Upgrading Screener](#) in the Screener guide.

| Module | Items to Back Up |
|---|--|
| Advanced Matching, Data Normalization, and Universal Name | <p>Back up the contents of these subfolders located in <code>SpectrumDirectory/server/modules</code>:</p> <ul style="list-style-type: none"> • <code>cdqdb</code> • <code>lucene</code> • <code>matcher</code> • <code>parser</code> • <code>searchindex</code> • <code>tables</code> |
| Context Graph | <p>Open the Relationship Analysis Client and click Manage. Select the model you want to back up then click Backup. You can also perform Context Graph backups with CLI commands.</p> <p>In addition to backing up your models, back up these two property files:</p> <ul style="list-style-type: none"> • <code>server\modules\hub\hub.properties</code> • <code>server\modules\hub\db\neo4j.properties</code> |
| Spatial | <p>Back up your named resources, data, and configuration files.</p> |

3. Stop all the nodes in the server cluster then stop all the nodes in the configuration database cluster. Make a note of the last node that you stop in the configuration database cluster. You must start this node first after upgrading. For instructions on stopping a cluster, see [Stopping a Cluster](#) on page 75.

4. On the *last* node that you shut down in the configuration database cluster, run `installdb.exe`. The installer upgrades the configuration database.

Warning: The first node that you upgrade must be the last node that was stopped. This is because on some operating systems the configuration database will start automatically at the end of the upgrade process. If the first node that starts is not the last node that was stopped, data such as job history and configuration settings may be lost. If you do not know which node was stopped last, look in each node's log for the time stamp of the shutdown message. You can find the log in: `SpectrumDirectory\Database\logs\spectrum-server.log`.

Important: When prompted with the option to start Spectrum Technology Platform after the installation, you must disable this option so that the database does not start automatically when the installation completes.

5. After the upgrade is complete, the configuration database starts up automatically. Verify that the configuration database is fully started before continuing by opening the log file `SpectrumInstallationLocation\Database\logs\spectrum-server.log` and looking for the message `Started`.
6. Stop the configuration repository.

Right-click the Spectrum Technology Platform icon in the Windows system tray and select **Stop Spectrum**. Alternatively, you can use the Windows Services control panel to stop the configuration database by stopping the **Spectrum Database** service.

Important: Do not attempt to stop the server until after it has fully started for the first time. Stopping the server before it performs an initial startup can cause your installation to become unusable.

7. Configure the database cluster.
 - a) Edit the file `Database/repository/spectrum-container.properties` as described in [Cluster Properties for a Configuration Database Cluster](#) on page 82.
 - b) Save and close the `spectrum-container.properties` file.
 - c) Start the *last* node that was stopped in the configuration database cluster. To start the configuration database, right-click the Spectrum Technology Platform icon in the Windows system tray and select **Start Spectrum**. Alternatively, you can use the Windows Services control panel to start the configuration database by starting the **Spectrum Database** service.
 - d) To start the configuration database, right-click the Spectrum Technology Platform icon in the Windows system tray and select **Start Spectrum**. Alternatively, you can use the Windows Services control panel to start the configuration database by starting the **Spectrum Database** service.
 - e) After the upgraded configuration database is fully started, repeat the previous steps to upgrade each of the remaining servers in the configuration database cluster and start each of them.
8. Upgrade each node in the server cluster. For more information, see [Upgrading a Cluster](#) on page 65.

Important: When installing each server select the **Server only** option in the installer and provide the host and port of one or more of the configuration database servers. You can find the port in

the file `SpectrumDirectory\Database\repository\spectrum-container.properties`. The port is specified in the `spectrum.repository.server.connector.bolt.port` property.

Note: Any job or subflow stored in the system during a server upgrade is marked as exposed to provide the same behavior for those jobs and subflows as before the upgrade. Any job or subflow that is exported prior to the upgrade will not be exposed. Therefore, when importing these jobs or subflows back into the system, you must manually expose the imported job or subflow.

Some modules have post-upgrade steps you need to perform.

| | |
|-------------------|---|
| Context Graph | <p>Open this file in a text editor: <code>server/modules/hub/db/neo4j.properties</code> and set this property to true: <code>dbms.allow_upgrade=true</code>. This property protects against unintentional and irreversible store upgrades. Setting this property to "true" indicates that you understand the ramifications of proceeding with an upgrade and have taken the necessary precautions before proceeding.</p> <p>Restart the Spectrum Technology Platform server. The server will upgrade each model. Examine the file <code>server/logs/spectrum-server.log</code> for errors or warning messages. Once all models have been upgraded, edit the <code>neo4j.properties</code> file again and comment out the <code>dbms.allow_upgrade</code> property.</p> |
| Spatial | <p>During an upgrade, the pool size is reset to 4 if set to a lower value. A pool size setting of 4 or more is unaffected. To change the Remote Component Pool Size value after upgrading, open the Management Console and select Resources > Spatial. Change the pool size value and click Save. For details, see <i>Modifying the Pool Size</i> in the <i>Spectrum Spatial Guide</i>.</p> |
| Spectrum Screener | <p>See the Upgrading Screener section of the Screener guide for details.</p> |

Upgrading a Cluster with a Separated Database and Context Graph

- Before upgrading, be sure to read the release notes for the new version. The release notes contain a list of known issues, important compatibility information, supported upgrade paths, and module-specific data backup recommendations.
- Apply all the latest updates available for your operating system, especially those that resolve issues with Java.
- Install all patches and updates in an earlier version of Spectrum Technology Platform before you upgrade to Spectrum Technology Platform 2020.1.0
- **Important:** We recommend that you create a backup before upgrading so that if an error occurs during the upgrade you can recover your flows, security settings, and other settings and customizations, if an error occurs during the upgrade process.

To retain customized settings in the `wrapper.conf` file located in the `SpectrumDirectory/server/bin/wrapper` directory, you will need to compare the contents of `wrapper.conf` installed during the upgrade with the contents of the backed up copy of the file. You can then manually copy customizations that you want to retain after the upgrade into the updated version of the file. This is particularly important for changes to the initial and maximum Java heap sizes.

This procedure describes how to upgrade Spectrum Technology Platform when you have separated the configuration database from the server and you have the Context Graph module installed. The upgrade process consists of these steps:

1. Stop the server cluster.
2. Stop the configuration database cluster.
3. Upgrade the last node that was stopped in the configuration database cluster.
4. Upgrade the other nodes in the configuration database cluster.
5. Upgrade the server acting as Context Graph master in the server cluster.
6. Upgrade the non-master servers in the server cluster.

To upgrade a cluster with a separated configuration database and Context Graph, follow this procedure:

1. Back up the server. For instructions on creating a backup, see the *Administration Guide*.

Important: We recommend that you create a backup before upgrading so that you can recover your flows, security settings, and other settings, if an error occurs during the upgrade process.

2. Open the Relationship Analysis Client and click **Manage**. Select the model you want to back up then click **Backup**.

In addition to backing up your models, back up these two property files:

- `server\modules\hub\hub.properties`
- `server\modules\hub\db\neo4j.properties`

3. Identify which node is the serving as the master server for Context Graph.

a) Open a web browser and go to:

`http://LoadBalancer:8080/jmx-console/HttpAdaptor/list`

b) Scroll down to the **neo4j.org domain**.

You will see a set of objects for each model. The **Role** attribute in the **HighAvailability** object indicates whether a server is the master for a model.

c) If you have more than one model and each model has a different master, you need to make one server the master of all the models. To do this, restart the cluster then open the Relationship Analysis Client using the hostname or IP address of one of the nodes rather than the load balancer. In the Relationship Analysis Client, open each model by running a query on each model. This will make the server you are connected to the master for each model.

4. Stop all the non-master nodes in the server cluster then stop the master server last. Stop nodes one at a time rather than all at once.

Important: Make sure that Spectrum Technology Platform stops without errors. If a server does not stop properly, Context Graph models on the server will not open successfully after upgrading. To ensure that Spectrum Technology Platform stopped cleanly, examine the `SpectrumFolder\server\logs\spectrum-server.log` file for errors during shutdown.

5. Stop all the nodes in the configuration database cluster. Make a note of the last node that you stop in the configuration database cluster. You must start this node first after upgrading.

6. On the *last* node that you shut down in the configuration database cluster, execute `installdb.exe`. The installer upgrades the configuration database.

Warning: The first node that you upgrade must be the last node that was stopped. This is because on some operating systems the configuration database will start automatically at the end of the upgrade process. If the first node that starts is not the last node that was stopped, data such as job history and configuration settings may be lost. If you do not know which node was stopped last, look in each node's log for the time stamp of the shutdown message. You can find the log in: `Spectrum Location\server\logs\spectrum-server.log`.

7. After the upgrade process finishes, wait for the server to start, then stop the server.

You can see when the server has started up by opening the log file

`SpectrumDirectory\server\logs\spectrum-server.log` and looking for this message:

```
INFO [Server] Precisely Technology Platform Database (Version version
build) Started
```


Important: Do not attempt to stop the server until after it has fully started for the first time. Stopping the server before it performs an initial startup can cause your installation to become unusable.

8. Configure clustering for the database cluster.

- a) Edit the file `server/conf/spectrum-container.properties` as described in [Cluster Properties for a Configuration Database Cluster](#) on page 82.
- b) Save and close the `spectrum-container.properties` file.
- c) Start the *last* node that was stopped in the configuration database. To start the configuration database, right-click the Spectrum Technology Platform icon in the Windows system tray and select **Start Spectrum**. Alternatively, you can use the Windows Services control panel to start the configuration database by starting the **Spectrum Database** service.

Warning: The first node that you start must be the last node that was stopped to preserve the most recent data. Starting another node first may result in loss of data such as job history and configuration settings. If you do not know which node was stopped last, look in each node's log for the time stamp of the shutdown message. You can find the log in: `SpectrumDirectory\server\logs\spectrum-server.log`.

- d) After the upgraded configuration database is fully started, repeat the previous steps to upgrade each of the remaining servers in the configuration database cluster and start each of them.

9. Upgrade the Context Graph master server in the server cluster.

- a) If you are upgrading from Spectrum Technology Platform 12.0 or later, each model directory must contain a `version.data` file. Review all the `model.ModelName` subdirectories located under `SpectrumFolder\server\modules\hub\db` to confirm that they contain a `version.data` file. If any model directory is missing this file, copy the corresponding `version.data` file from one of the non-master nodes.
- b) **Important:** The installer will prompt you to start Spectrum Technology Platform after the installation completes. You must disable this option so that the server does not start automatically when the installation completes.

Run the Spectrum Technology Platform installer to upgrade the master server to the new version of Spectrum Technology Platform.

- c) Open the file `SpectrumFolder\server\modules\hub\hub.properties` in an editor and confirm that the following property is set to embedded:

```
hub.neo4j.database.type=embedded
```

- d) Open the file `SpectrumFolder\server\modules\hub\db\neo4j.properties` in an editor and set the following property to true.

```
dbms.allow_upgrade=true
```

- e) Start the Spectrum Technology Platform server.
- f) Open each model in the Relationship Analysis Client and run a query. Any query is sufficient.

- g) Stop the Spectrum Technology Platform server.
- h) Indexed properties are now restricted to a maximum length of 4036 bytes. If your model has an indexed property that exceeds this limitation, proceed to step [#unique_97/unique_97_Connect_42_d61e313](#).

If your model does not have an indexed property that exceeds this limitation, continue with substep [#unique_97/unique_97_Connect_42_d61e278](#).

- i) Open the *SpectrumFolder\server\modules\hub\hub.properties* file in an editor and set the following properties:

```
hub.neo4j.database.type=ha
hub.servers.per.cluster=must be set to number of servers in the
cluster
```

- j) Compare any properties files that you backed up to the installed files and make any necessary changes. Do not overwrite new files with old files because new files may contain properties that old files do not.
- k) Skip step [10](#) on page 90 and continue to step [11](#) on page 90.

10. Upgrade the Context Graph non-master servers in the server cluster.

Important: When installing each server select the **Server only** option in the installer and provide the host and port of one or more of the configuration database servers. You can find the port in the file *SpectrumDirectory\Database\repository\spectrum-container.properties*. The port is specified in the *spectrum.repository.server.connector.bolt.port* property.

- a) Delete the models in the *SpectrumFolder\server\modules\hub\db* directory.

Warning: Do not delete the models from the master server.

- b) **Important:** The installer will prompt you to start Spectrum Technology Platform after the installation completes. You must disable this option so that the server does not start automatically when the installation completes.

On one of the non-master servers, run the Spectrum Technology Platform installer to upgrade it to the new version of Spectrum Technology Platform.

- c) Open the *SpectrumFolder\server\modules\hub\hub.properties* file in an editor and confirm that the following properties are set:

```
hub.neo4j.database.type=ha
hub.servers.per.cluster=must be set to number of servers in cluster
```

- d) Compare any properties files that you backed up to the installed files and make any necessary changes. Do not overwrite new files with old files because new files may contain properties that old files do not.
- e) Copy all *SpectrumFolder\server\modules\hub\db\model.ModelName* directories from the master server to the non-master server.
- f) Repeat these steps for each non-master server in the cluster.

11. Start all nodes in the cluster consecutively after upgrading.

- a) Make sure that you start node 2 within only a few seconds after starting node 1, and repeat this for each remaining node.
- b) Ensure that each server in the cluster is functioning. Check `SpectrumFolder\server\logs\spectrum-server.log` for any errors.
- c) While directly connected to the master server (bypassing the load balancer), open each model, one at a time, and inspect the `spectrum-server.log` file for errors.

Converting to a Separated Configuration Database

Converting an existing Spectrum Technology Platform installation to a separated configuration database enables you to take advantage of the improved scalability of a separated configuration database. When you convert to a separated configuration database, your existing installation is converted from one where the configuration database is part of the server to one where the configuration database is in a separate cluster.

At a high level, this is the conversion process:

- Stop your existing Spectrum Technology Platform server.
- Set up the new configuration database cluster:
 - Install the separate configuration database software on a new server.
 - Copy your existing configuration database to the new server.
 - Configure clustering and start the configuration database cluster.
- Install the server-only cluster and start it up.

Note: This procedure applies both to converting a single server to a separated configuration database, and converting a cluster to a separated configuration database.

To convert to a separated configuration database:

1. Back up module-specific data for any of these modules if you have them installed.

Note: For Screener, see the section [Upgrading Screener](#) in the Screener guide.

| Module | Items to Back Up |
|---|--|
| Advanced Matching, Data Normalization, and Universal Name | <p>Back up the contents of these subfolders located in <i>SpectrumDirectory/server/modules</i>:</p> <ul style="list-style-type: none"> • <i>cdqdb</i> • <i>lucene</i> • <i>matcher</i> • <i>parser</i> • <i>searchindex</i> • <i>tables</i> |
| Context Graph | <p>Open the Relationship Analysis Client and click Manage. Select the model you want to back up then click Backup. You can also perform Context Graph backups with CLI commands.</p> <p>In addition to backing up your models, back up these two property files:</p> <ul style="list-style-type: none"> • <i>server\modules\hub\hub.properties</i> • <i>server\modules\hub\db\neo4j.properties</i> |
| Spatial | <p>Back up your named resources, data, and configuration files.</p> |

2. Stop the server. If you have a clustered installation, stop the cluster.
3. Install the configuration database to a new server.
 - a) Place the Spectrum Technology Platform installer on the machine where you want to install the configuration database. This must be a different machine from the one where you have your existing Spectrum Technology Platform server installed.
 - b) Double-click *installdb.exe*.
 - c) Follow the prompts to install the configuration database.

Important: When prompted with the option to start Spectrum Technology Platform after the installation, you must disable this option so that the database does not start automatically when the installation completes.

- d) Copy the *databases* folder from your existing server to the server where you installed the separate configuration database. Replace the existing folder.

Important:

- If you are upgrading from any previous version 12.0 or later, copy this folder:
SpectrumDirectory\Database\repository\data\databases folder.

- a) Configure the cluster properties for the database cluster by editing the file `Database\repository\spectrum-container.properties` as described in [Cluster Properties for a Configuration Database Cluster](#) on page 82.
 - b) Save and close the `spectrum-container.properties` file.
 - c) Start the configuration database. To start the configuration database, right-click the Spectrum Technology Platform icon in the Windows system tray and select **Start Spectrum**. Alternatively, you can use the Windows Services control panel to start the configuration database by starting the **Spectrum Database** service.
 - d) Install the configuration database on additional servers as needed to complete the configuration database cluster.
4. Install the server.
- a) (Optional) If you are upgrading to a new version and you want to use the same machine to host the upgraded server as hosted the existing server, uninstall the existing server of Spectrum Technology Platform.
 - b) Install the server cluster. For more information, see [Installing a Cluster](#) on page 56.
- Important:** When installing each server select the **Server only** option in the installer and provide the host and port of one or more of the configuration database servers. You can find the port in the file `SpectrumDirectory\Database\repository\spectrum-container.properties`. The port is specified in the `spectrum.repository.server.connector.bolt.port` property.

Converting from a Separated Configuration Database to a Standard Installation

If you have a cluster that consists of separate clusters for the server and for the configuration database, you can convert your installation to a standard installation where the server and configuration database are installed together on the same server.

1. Back up module-specific data for any of these modules if you have them installed.

Note: For Screener, see the section [Upgrading Screener](#) in the Screener guide.

| Module | Items to Back Up |
|---|--|
| Advanced Matching, Data Normalization, and Universal Name | <p>Back up the contents of these subfolders located in <i>SpectrumDirectory/server/modules</i>:</p> <ul style="list-style-type: none"> • <i>cdqdb</i> • <i>lucene</i> • <i>matcher</i> • <i>parser</i> • <i>searchindex</i> • <i>tables</i> |
| Context Graph | <p>Open the Relationship Analysis Client and click Manage. Select the model you want to back up then click Backup. You can also perform Context Graph backups with CLI commands.</p> <p>In addition to backing up your models, back up these two property files:</p> <ul style="list-style-type: none"> • <i>server\modules\hub\hub.properties</i> • <i>server\modules\hub\db\neo4j.properties</i> |
| Spatial | Back up your named resources, data, and configuration files. |

2. Stop all the nodes in the server cluster, then stop all the nodes in the configuration database cluster.
3. The configuration database must be of the same version of Spectrum Technology Platform as the server you are converting to. If the configuration database is from an older version, upgrade the configuration database to the same version of Spectrum Technology Platform as the version you want to use for the standard server. The installer upgrades the configuration database.

Warning: The node that you upgrade must be the last node that was stopped. This is so that data such as job history and configuration settings are not lost. If you do not know which node was shut down last, look in each node's log for the time stamp of the shutdown message. You can find the log in: *SpectrumDirectory\server\logs\spectrum-server.log*.

4. After the upgrade process finishes, wait for the server to start, then stop the server.

You can see when the server has started up by opening the log file *SpectrumDirectory\Database\logs\spectrum-server.log* and looking for the message Started.

Important: Do not attempt to stop the server until after it has fully started for the first time. Stopping the server before it performs an initial startup can cause your installation to become unusable.

5. Install a new server.

For instructions, see [Installing a New Server](#)

Note: When prompted, be sure to select **Standard Installation**, not **Server only**.

6. Stop the server.
7. Copy the `databases` folder from the last configuration database server you stopped to the new server, replacing the existing folder.

Important:

- If you are upgrading from any previous version 12.0 or later, copy this folder:
`SpectrumDirectory\Database\repository\data\databases` folder.

.

8. Start the server.

6 - Spectrum Databases

After you have installed the server you need to install the databases that support the modules you have installed. Databases provide the information that Spectrum Technology Platform modules use to process data, such as postal address data, name data, or geospatial data. For example, if you have installed Enterprise Geocoding , you will need to install databases that contain geospatial data; if you have installed Universal Addressing, you will need to install databases that contain postal data.

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Installing a Spectrum Database

Spectrum databases contain reference data from trusted data providers that is used to enhance and validate your data. For example, to perform address validation, Spectrum Technology Platform uses official address data from postal authorities to compare your address to addresses of record. Other types of processing that use Spectrum databases include geocoding, routing, and tax jurisdiction assignment for a given address.

We update Spectrum databases periodically to provide you with the most up-to-date data from third-party data providers. Database updates occur independently from software updates, in some cases quarterly or even monthly. When a database update is available you will receive an email notification that includes a link to download the updated database. You should install it as soon as possible so that you are using the most accurate data available.

Spectrum Technology Platform provides CLI commands that help you install, maintain, and archive SPD files.

- Use the **productdata archive register** command to configure an alternate (non-default) location for the Spectrum Platform Data (SPD) archive.
- Use the **productdata extract register** command to specify an alternate (non-default) extract location for a set of product data on the server.

The default SPD file archival area is `../archive/ref-data`. Extracted SPD files are located in `../ref-data`.

- Use the **productdata install** command to install your data files.

We recommend using the `productdata extract register` and `productdata archive register` commands to ensure that the SPD data, which may be large, resides in an appropriate and manageable location of your choosing on the server. The default location inside the Spectrum folders can make upgrades and re-installations more difficult and require even greater temporary space.

SPD Setup on a New Spectrum Server

If you are a new customer to the Spectrum Technology Platform or setting up a new Spectrum server, we recommend setting a location for your Spectrum Product Data (SPD) that is separate from the Spectrum Technology Platform installation folder.

The Spectrum Technology Platform has Command Line Interface (CLI) commands for setting the SPD file archive location and for setting the extract location. The archive location establishes the archive location for the data on the Spectrum server. The extract location establishes the extract location for the data on the Spectrum server. You only need to run these commands once to set the

extract and archive locations. Spectrum remembers these locations for future Spectrum Product Data (SPD) installations.

If you do not use these commands to set the location for your Spectrum Product Data (SPD), then Spectrum installs the data to default locations: the default SPD file archive area is `../archive/ref-data` and extracted SPD files are in `../ref-data` under the spectrum folder where the Spectrum Technology Platform is installed. Installing to the default location may affect:

- How long it takes to upgrade the Spectrum Technology Platform because everything under the spectrum folder, including data, is backed up to a ZIP archive file during the upgrade. If there is not enough space on the server, the upgrade will stop.
- How long it takes to uninstall and reinstall the Spectrum Technology Platform, which would include the extra step of reinstalling Spectrum Product Data (SPD). Uninstalling the Spectrum Technology Platform removes everything under the spectrum installation folder including any data files.
- The space requirements for the Spectrum server machine.
- The length of the folder paths to the data.

Setting Product Data Extraction and Archive Locations

This procedure describes how to set the folder locations that a Spectrum server uses for its Spectrum Product Data (SPD).

We recommend different locations for the Spectrum install and the Spectrum archive and extract folders. You must be a Spectrum Technology Platform administrator (admin) to perform this task.

The Spectrum Technology Platform has Command Line Interface (CLI) commands for setting the SPD file archive location and for setting the extract location. You only need to run the product data extract, and product data archive commands once to set the extract and archive locations. Spectrum remembers these locations for future Spectrum Product Data (SPD) installations.

To set the data file archive location and extract locations:

1. Verify that the Spectrum Technology Platform server is running before you begin.
2. Open a command-line window.
3. Connect to the Spectrum server by typing this command:

```
connect --h servername:port --u username --p password --s SSLtrueFalse
```

For example,

```
connect --h myserver:8080 --u admin --p myPassword1 --s false
```

4. Establish the extract location for the data on the server by typing:

```
productdata extract register --p product --d directory
```

For example,

```
productdata extract register --p platform --d
E:/SpatialFiles/SpectrumDataStorage
```

5. Establish the archive location for the data on the server by typing:

```
productdata archive register --p product --d directory
```

For example,

```
productdata archive register --p platform --d E:/SpatialFiles/Archive
```

You are now ready to install Spectrum Product Data (SPD). For details, see [Installing Spectrum Product Data](#) on page 99

Installing Spectrum Product Data

This procedure describes how to install Spectrum Product Data (SPD) from Precisely. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.

To add Spectrum Product Data (SPD) to a Spectrum server:

1. Add Spectrum data using product data Command Line Interface (CLI) commands as described in [Adding Data to Spectrum](#) on page 99.
2. Create a database resource using the Management Console as described in [Creating a Database Resource](#) on page 101.

Modules may have additional instructions that are specific to the module and data used by the module. See [Spectrum Databases](#) on page 96 to locate additional module-specific information or instructions.

Adding Data to Spectrum

You must be a Spectrum Technology Platform administrator (admin) to perform this task. If you are a new customer to the Spectrum Technology Platform or setting up a new Spectrum server, we recommend setting a location for your Spectrum Product Data (SPD) that is separate from the Spectrum Technology Platform installation folder. For details, see [SPD Setup on a New Spectrum Server](#) on page 97 and [Setting Product Data Extraction and Archive Locations](#) on page 98.

The Spectrum Technology Platform has Command Line Interface (CLI) commands to install Spectrum data without having to download the data to the Spectrum server or having to connect your Spectrum server to the internet. The CLI commands copy data to the Spectrum server.

After installing the data, we suggest keeping your download files so that those files are available if you need to reinstall Spectrum data in the future. If you need to remove data from the Spectrum server, use the Spectrum command line (CLI) commands.

To install Spectrum Product Data (SPD):

1. Verify that the Spectrum Technology Platform server is running before you begin.
2. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com. If the download is a zip file, extract it to a temporary location.
3. Open a command-line window.
4. Connect to the Spectrum Technology Platform server by typing this command:

```
connect --h servername:port --u username --p password --s SSLtrueFalse
```

For example,

```
connect --h myserver:8080 --u admin --p myPassword1 --s false
```

5. Optionally list the locations of extracted Spectrum Product Data (SPD) files based on product name by typing:

```
productdata extract list
```

The command output shows the directory where files are located for each product.

6. Install the data to the Spectrum server by typing:

```
productdata install --f fileOrDirectory --w waitOrReturn
```

For example,

```
productdata install --f E:/SpatialFiles/Geocoding/KNT072019.spd --w
```

If installing a Spectrum product with multiple .spd files, then use the folder path to the files. The command installs the data files that are in the folder and subfolders. For example:

```
productdata install --f E:/SpatialFiles/Geocoding --w
```

7. Define a database resource for the data in the Management Console or by using the Administration Utility database commands. Instructions may vary by module and data, see [Spectrum Databases](#) on page 96 to locate additional module-specific information or instructions. For general instructions, see [Creating a Database Resource](#) on page 101.

For more information about these Product Data CLI commands, see *Product Data* under *Administration Utility* in the *Spectrum Technology Platform Administration Guide*.


Creating a Database Resource

You must be a Spectrum Technology Platform administrator (admin) or Spatial administrator (spatial-admin) to perform this task. If you are a Spatial sub-administrator (spatial-sub-admin), then you must have permission to the folder that you are editing.

To create a database resource for Spectrum:

1. Open Management Console.
2. Go to **Resources > Spectrum Databases**.

If you do not see the **Spectrum Databases** menu, then you do not need to define database resources.

3. Click the **Add** button  to create a new database resource.
4. Enter a name for the database resource in the **Name** field. The name can be anything you choose.
5. In the **Module** field, select the name of your module.

If you have modules that use Spectrum databases, they display in the **Module** field.

Note: Modules may have additional fields and settings beyond what the following steps describe. If this is the case, see [Spectrum Databases](#) on page 96 for more details about the module you have installed.

6. If applicable, in the **Type** field, select the type of data.

A list of available databases displays in the table, including description and vintage.

7. Select one or more entries from the list.

This list should include the data you installed using the `productdata install` command as described in [Adding Data to Spectrum](#) on page 99.

8. Click **Save** to create the database.

A list of the Spectrum databases and status displays. (It may take a moment to refresh the **Status** column.)

Deleting Data from Spectrum

Warning: Do not manually delete any files in the Spectrum data archive or extract locations.

To delete data from a Spectrum server, to replace the data with a newer version or to clean the data from a machine, use the Spectrum command line (CLI) commands.

To remove data from a Spectrum server:

1. In the Management Console, delete the database resource that is using the data as described in [Deleting a Database Resource](#) on page 102.

- Using CLI commands, delete the data from the Spectrum server as described in [Deleting Data from Spectrum](#) on page 102.


Modules may have additional instructions that are specific to the module and data used by the module. Check the [Spectrum Databases](#) on page 96 section for the module you have installed.

Deleting a Database Resource

Warning: Before deleting any resource, verify that jobs or services are not using the resource. Deleting a resource that is referenced by jobs or services causes those jobs or services to fail.

You must be a Spectrum Technology Platform administrator (admin) or Spatial administrator (spatial-admin) to perform this task. If you are a Spatial sub-administrator (spatial-sub-admin), then you must have permission to the folder that you are editing.

To delete a database from Spectrum:

- Open Management Console.
- Go to **Resources > Spectrum Databases**.
- Put a check mark next to the Spectrum database you want to delete.
- Click the **Delete** button .

Deleting a Spectrum database does not delete the actual data files. After deleting the resource, you must delete the data files from the Spectrum server if you want to free up space on your system. For instructions, see [Deleting Data from Spectrum](#) on page 102.

Deleting Data from Spectrum

You must be a Spectrum Technology Platform administrator (admin) to perform this task.

Before deleting data, verify that it is not being used by a database resource in the Management Console. For details, see [Deleting a Database Resource](#) on page 102.

To delete data from a Spectrum server:

- Verify that the Spectrum Technology Platform server is running before you begin.
- Connect to the Spectrum Technology Platform server by typing this command:

```
connect --h servername:port --u username --p password --s SSLtrueFalse
```

For example,

```
connect --h myserver:8080 --u admin --p myPassword1 --s false
```

- Run the `productdata list` command to view the details for the currently installed data. The results provide current information without having to access the file system. We recommend using this command before using the `productdata delete` command to make an informed decision about the data to delete.

Open a command-line window and type the following:

```
productdata list
```

4. Run the `productdata delete` command to delete the data from a Spectrum server by typing:

```
productdata delete --p productName --c productComponent --q qualifier
--v dataVintage
```

For example,

```
productdata delete --p gam --c gav --q GAV-DEU --v 201907
```

For more information about these Product Data CLI commands, see *Product Data* under *Administration Utility* in the *Spectrum Technology Platform Administration Guide*.


Modifying a Spectrum Database Resource

You must be a Spectrum Technology Platform administrator (admin) to perform this task.

A Spectrum database may include multiple data entries: a North American database might include Canada, United States (USA), and Mexico data; a population survey database might include yearly updates for a sales region. Managing a database may include adding data to it to increase its coverage, relevance, or accuracy, or removing data from it to change its coverage or reduce its size.

Every Spectrum database resource has a name, which is used in your dataflows as well as web service APIs. It is important when modifying a database that the database name remains untouched.

To modify a database by adding or removing data:

1. Open Management Console.
2. Go to **Resources > Spectrum Databases**.
3. Put a check mark next to the Spectrum database you want to modify and then click Modify button .
4. Either add data or remove data from the database.
 - To add data, select a data entry. If the data you want to add is not in the list, then you must add it to the Spectrum server, as described in [Adding Data to Spectrum](#) on page 99.
 - To remove data, clear the check box beside the data entry.
5. Click **Save**.

Removing data from a Spectrum database does not delete the actual data files. If you wish to also delete the files from the Spectrum server to free up space on your system, see [Deleting Data from Spectrum](#) on page 102.

Installing Advanced Matching Database

Advanced Matching provides a load utility to install databases. The database files that you install depend on the databases you have licensed.

Note: To install Advanced Matching databases on Windows Server 2008 you need administrator privileges.

1. Make sure no applications are running.
2. Stop Spectrum Technology Platform. To do this, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Stop Server**.
3. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication.

Note: The data downloads as a zip file. Unzip the database before proceeding with the installation.

4. Select **Start > Programs > Precisely > Spectrum Technology Platform > Modules > Universal Name and Advanced Matching > Universal Name and Advanced Matching Database Load Utility**.
5. Follow the prompts during the rest of the installation process.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

6. Open the file *SpectrumDirectory\server\bin\wrapper\wrapper.conf* in a text editor.
7. Increase the Java settings for initial heap size (*wrapper.java.initmemory*) and maximum heap size (*wrapper.java.maxmemory*) to reflect the total amount of memory required for the Arabic Plus Pack and Asian Plus Pack.
 - Arabic Plus Pack: 5.5 GB
 - Asian Plus Pack - Chinese: 32 MB
 - Asian Plus Pack - Japanese: 1.6 GB
 - Asian Plus Pack - Korean: 8 MB
 - Core Names: 1.1 GB
8. Save and close *wrapper.conf*.
9. Start Spectrum Technology Platform. To do this, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Start Server**.

Installing Data Normalization Databases

Data Normalization provides a load utility to install databases for the Advanced Transformer, Open Parser, and Table Lookup components. The database files that you install depend on the databases you have licensed. Use this list of database tables to determine which files you should download and install. For more information about tables contained in each database, refer to the reference documentation for each component.

| Stage | Available Databases |
|----------------------|--|
| Advanced Transformer | Data Normalization - Base Tables |
| Open Parser | <ul style="list-style-type: none"> • Data Normalization - Base Tables • Core Names Database • Company Names Database • Arabic Plus Pack • Asian Plus Pack |
| Table Lookup | <ul style="list-style-type: none"> • Data Normalization - Base Tables • Core Names Database • Arabic Plus Pack • Asian Plus Pack • ZREPLACE (Used by the SAP for French address validation) |

Note: To install Data Normalization databases on Windows Server 2008 you need administrator privileges.

1. Make sure no applications are running.
2. Stop Spectrum Technology Platform. To do this, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Stop Server**.
3. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication.

Note: The data downloads as a zip file. Unzip the database before proceeding with the installation.

4. Select **Start > Programs > Precisely > Spectrum Technology Platform > Modules > Data Normalization > Data Normalization Database Load Utility**.
5. Follow the prompts during the rest of the installation process.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

6. Start Spectrum Technology Platform. To do this, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Start Server**.

Installing Databases for Enterprise Geocoding and Global Geocoding

International geocoding databases contain the data necessary to perform geocoding and reverse geocoding for locations outside the U.S. Each country has its own database, and some countries have optional databases that provide enhanced geocoding.

These databases are for use in Global Geocoding and Enterprise Geocoding.

Note: Do not install geocoding databases on a network drive. Doing so can cause performance problems.

Note: To install Enterprise Geocoding databases on Windows Server 2008 you need administrator privileges.

1. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.
2. The database is downloaded as a zip file. Unzip the database before proceeding with the installation.
3. Install the SPD files:
 - a) Place the SPD files in *SpectrumDirectory/server/import*. This is the default location for SPD files. The Spectrum Technology Platform server monitors this folder and looks for new files in two-second intervals.
You can change the location of the data import directory by altering the **spectrum.import.dir** property in the *SpectrumDirectory/server/conf/spectrum-container.properties* file.
 - b) When the server detects new SPD files, the server automatically extracts the SPD files to *SpectrumDirectory/server/ref-data*.

You can change the location of the data storage folder by altering the **spectrum.data.manager.storage.dir** property in the Data Manager settings section of the *SpectrumDirectory/server/conf/spectrum-container.properties* file.

4. At this point the data will become available and you can add it as a Spectrum database resource in the **Spectrum Databases** section of Management Console.
5. After you install the database files, use either the Database Resource tool in the Management Console or the Global Addressing Administration Utility database commands to define the database as a resource.
6. After the SPD files are extracted and are no longer needed, use the CLI commands to delete the SPD files. Do not manually delete the SPD files from the location where the server extracted the SPD files. Instead, use these CLI commands to delete the SPD files. For more information about the Product Data CLI commands, see Administration Utility in your Spectrum Technology Platform *Administration Guide*.
 - a) Run the `productdata list` command to view the details for the currently installed SPD files. The results provide current information without having to access the file system. We suggest that you run this command before you run the `productdata delete` command, to make an informed decision about the data to delete.
 - b) Run the `productdata delete` command to delete the SPD files from the Spectrum Technology Platform.

Example

```
productdata delete --p productName --c productComponent --q qualifier --v dataVintage
```

```
spectrum> productdata delete --p gam --c gav --q GAV-DEU --v 201907
```

AUS G-NAF

If you installed the Australia Geocoded National Address File (G-NAF), you must specify the `GNAF123` and `GNAF456` as separate paths but in the same database resource in Management Console. `GNAF123` contains the point-level dictionary. This has the highest precision of geocoding (characterized by Reliability Level 1, 2, or 3.) `GNAF456` contains the remainder of address information in G-NAF that does not meet high precision geocoding criteria (characterized by Reliability Level 4, 5, or 6.) We recommend that you use both databases to validate the existence of addresses but only use `GNAF123` for parcel-level geocoding. If you do not require parcel-level geocodes you can use `GNAF456` for geocoding.

U.S. Geocoding Databases

The U.S. geocoding databases contain the spatial data necessary to perform address standardization and geocoding. You must install at least one of these databases.

- **Centrus Enhanced Geocoding**—This database consists of TIGER data provided by the U.S. Geological Survey and address data provided by the U.S. Postal Service.
- **TomTom Geocoding**—This database provides more up-to-date data than the Centrus Enhanced Geocoding database. It requires an additional license. The data is provided by TomTom, a third-party provider of spatial data, and postal data from the U.S. Postal Service.
- **HERE Geocoding**—This database provides more up-to-date data than the Centrus Enhanced Geocoding database. It requires an additional license. HERE data is provided by HERE, a third-party provider of spatial data. For more information about these databases, contact your sales representative.
- **ZIP + 4 Centroid**—This database provides only address standardization and ZIP + 4 centroid matching. It does not provide street-level matching.

These databases use proprietary files called GSD files. For ZIP Code centroid matching, the file `us.Z9` contains all the centroid info for all states and normally has a `z9` extension.

Each geocoding database has an optional Statewide Intersections Index. The Statewide Intersection Index is designed to enable fast intersection identification on a statewide basis. For example, the Statewide Intersection Index will allow the database to search for "1st and Main St, CO" and return a list of possible matches in Colorado more quickly than searching the entire geocoding database for each instance of the intersection.

Note: To install Enterprise Geocoding databases on Windows Server 2008 you need administrator privileges.

1. Make sure no applications are running.
2. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.
3. The database is downloaded as a zip file. Unzip the database before proceeding with the installation.
4. Run `DataSets.exe`. The installation wizard guides you through the rest of the process.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

5. After you install the database files, use the Database Resource tool in the Management Console to define the database as a resource. For more information, see the *Administration Guide*.

Points Databases (U.S. Only)

Points databases contain data for locating the center of a parcel. These databases provides enhanced geocoding accuracy for internet mapping, property and casualty insurance, telecommunications, utilities, and others.

- **Master Location Data**—This database provides the best available address point location for every mailable and deliverable address in the United States.
- **Centrus Points**—This database contains the data necessary to locate the center of a parcel or building. It does not contain assessor's parcel number (APN) or elevation data.
- **Centrus Elevation**—This database contains the same data as Centrus Points, plus elevation data.
- **Centrus Enhanced Points**—This database contains the same data as Centrus Points, plus APN data.
- **Centrus Premium Points**—This database contains the same data as Centrus Points, plus both APN and elevation data.
- **TomTom Points Database**—The data in this database is provided by TomTom, a third-party provider of spatial data.
- **HERE Points**—This database is provided by HERE, a third-party data provider. It contains data used to locate addresses at the center of the actual building footprint or parcel.

Note: To install Enterprise Geocoding databases on Windows Server 2008 you need administrator privileges.

1. Make sure no applications are running.
2. Insert the database DVD or download the database from Precisely. You received a download link with your product release announcement.

Note: If you download the database from the Precisely web site, it will be downloaded as a zip file. Unzip the database before proceeding with the installation.

3. Run `Setup.exe`. The installation wizard guides you through the rest of the process.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

4. After you install the database files, use the Database Resource tool in the Management Console to define the database as a resource. For more information, see *Spectrum Technology Platform Administration Guide*.

Early Warning System (U.S. Only)

The USPS provides free Early Warning System (EWS) data to prevent matching errors due to the age of the address information in the .gsd files. The USPS creates a new EWS data set each week that you can download from the USPS website (<https://postalpro.usps.com/cass/EWS>).

To install the Early Warning System (EWS) database rename the database file from OUT to EWS.txt and place it in the same folder as the primary database.

Installing Enterprise Tax Databases

Depending on the features you have licensed, you need to install one or more of these databases.

Downloading Database Files

Note: Prior to downloading the data files: If you have previously installed database files, you should back up those files and delete any copies of the .gdi, .gsd, gsi, .gsl, .gsu, .gsz, .gsx, .z9, .dir, .las and .los files in the data install directory.

Downloading from the eStore

Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com. If the download is a zip file, extract it to a temporary location.

Downloading from the Technical Support Web Site

Download the database from Precisely. You received a download link with your product release announcement or Welcome letter. The data file will be downloaded as a .zip file. Extract the files and make note of the directory where you save the files.

Downloading Florida Format Files

You can obtain the Florida format files from the Florida Department of Revenue. The Florida Department of Revenue compiles the database based on county.

1. Download the files from the Florida website at:
<https://pointmatch.state.fl.us/General/AddressFiles.aspx/>.
2. Unzip the downloaded files and transfer them to the server.
Note: Be sure to FTP your files in binary format.
3. Combine the county files into a single file if you downloaded more than one county. If you downloaded the entire state list, you have approximately 67 files. You must combine all the files into one file.
Your file is ready for loading.

Downloading TS-158 Format Files

The Federation of Tax Administrators (FTA) maintains a website with links to all data sources that use the TS-158 format.

1. Download the files from the Florida website at:
https://pointmatch.state.fl.us/General/AddressFiles.aspx.
2. Unzip the downloaded files and transfer them to the Spectrum Technology Platform server.
3. State files are often broken up into individual county files. Combine all state and/or county files into a single file.
Your file is ready for loading.

Database Options

The following describes the database options presented in the Windows Database Load Utility.

GeoTAX master files

The GeoTAX/Enterprise Tax Premium Database is a required dataset and is the master file for Enterprise Tax software. The master files identify all geographic components associated with a street address, such as the latitude/longitude, census tract, and block group.

Point Data files

Point Data products include Master Location Data (MLD), Centrus Points, HERE Points, and TomTom Points. The point data provides point-level geocoding for the most accurate placement of addresses throughout the U.S. The Master Location Data database provides the best available address point location for every mailable and deliverable address in the United States.

User auxiliary file

This is a user-defined file that Enterprise Tax uses to override results from the master files in street-level matching. If you have data that is more current than that in the master files, you can enter the new data into the auxiliary file and use it for your address matching. Enterprise Tax returns matches made with a code that signifies

the answer came from the auxiliary file. You can also return user-defined data from the auxiliary file with the match. The install program creates the file `G1GTAUX` in the specified destination.

GeoTAX auxiliary file

This file contains new addresses that have not yet been added to the master files. It provides the most up-to-date address data possible. The install program creates the indexed sequential file `G1GTAX2` in the specified destination.

Landmark auxiliary file

This is a user-defined file that allows you to specify customized address information in your input records. The recommended primary use of this file is to match to your company's non-address locations such as well heads, transmission towers or any other descriptive location. The latitude/longitude that is part of the input needed to build this file allows companies to automatically keep track of any jurisdictional changes that affect these unique locations. Matching to this file requires that the input record information match exactly to the Landmark file contents. This also applies to street records if you choose to enter them in the Landmark file. For more information, refer to the *Enterprise Tax Guide*.

State-supplied Florida format file

This is a state-supplied file in Florida-native format which is provided by individual state governments. Enterprise Tax first attempts to match to the state database. If Enterprise Tax cannot find a state match, it attempts a match to the GeoTAX Auxiliary file, if loaded, then to the master files.

State-supplied TS-158 format file

This is a state-supplied file in TS-158 (ANSI Transaction Set No. 158) format which is provided by individual state governments. Enterprise Tax first attempts to match to the state database. If Enterprise Tax cannot find a state match, it attempts a match to the GeoTAX Auxiliary file, if loaded, then to the master files.

Boundary file

Boundary files provide additional data about locations of special tax districts:

- Special Purpose Tax Districts (`spd.txb`)
- Insurance Premium Tax Districts (`ipd.txb`)
- Payroll Tax Districts (`pay.txb`)
- User-defined Boundary file (`usr.txb`)

Precisely Software tax rate file

The Precisely Sales and Use Tax Rate file allows you to use Enterprise Tax to provide sales and use tax rates for each of the assigned tax jurisdictions as well as the total rate for the assigned locations. The install program creates the indexed sequential file `GTTAXRT`.

Payroll tax correspondence file

Payroll tax cross-reference file allow you to use third-party software to determine the payroll tax rates. The cross-reference files combine the U.S. Government Federal Information Processing Standards (FIPS) codes with the proprietary geocodes used

by tax software from third parties. The Payroll System Tax Code file is a customized file that you build to return the payroll tax codes used by your payroll system. The install program produces database files called `G1GTPTC` and `G1GTPTC.vix`.

Sovos cross reference file

This sales tax cross-reference file enables you to use Enterprise Tax to determine tax jurisdictions for a given address, then use Sovos software to determine the sales tax rates for those jurisdictions.

Precisely Software Vertex cross reference file

This is a Vertex cross-reference file supplied by Precisely. The install program produces a database file `GTMSTR2` in the specified destination.

Installing the Database Files

1. Select **Start > Programs > Precisely > Spectrum Technology Platform > Modules > Enterprise Tax > Database Load Utility**.

The Database Load Utility window launches.

2. Select the database you want to install.

Note: For Point Data, select the **GeoTAX master files** option.

3. Follow the instructions provided by the wizard.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

4. In Management Console, open the Enterprise Tax database resource tool and define a database resource that includes the database you just installed. Be sure to update Assign GeoTAX Info and Reverse GeoTAX Info Lookup to use the new database resource.

Installing GeoEnrichment Databases

GeoEnrichment database resources are used by GeoEnrichmentLookup. Given a lookup key as input, the GeoEnrichmentLookup stage accesses a registered database and returns additional attribute data for the referenced address.

To install Spectrum Product Data (SPD) data from Precisely for use with GeoEnrichmentLookup, you must:

1. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.

2. Use Command Line Interface (CLI) commands to install the Spectrum Product Data to a Spectrum database. This copies the data to the Spectrum database and makes the Spectrum Technology Platform aware of the data in the database. For details, see [Adding Data to Spectrum](#) on page 99.
3. In Management Console, create a new database resource for the Spectrum Product Data, or change an existing database resource to include the Spectrum Product Data. For details, see *Adding a GeoEnrichment Database Resource* in the *GeoEnrichment Guide*.

If you are installing Spectrum Product Data for the first time, because you are a new customer to the Spectrum Technology Platform or setting up a new Spectrum server, then we recommend you set the data extract and archive locations before installing Spectrum Product Data. For details, see [SPD Setup on a New Spectrum Server](#) on page 97. We recommend using the `productdata extract register` and `productdata archive register` commands to ensure that the Spectrum Product Data, which may be large, resides in an appropriate and manageable location of your choosing on the server. The default location inside the Spectrum folders can make upgrades and re-installations more difficult and require even greater temporary space.

Installing Global Addressing Databases

This procedure describes how to download and install Global Addressing databases in the Spectrum Product Database (SPD) format from data.precisely.com.

Disk Space

The disk space requirements for extracted and non-extracted SPD bundles are:

- Extracted bundles (all SPD) - 100 GB
- Non-extracted bundles (all SPD) - 32 GB

Memory

A typical Global Address Validation (GAV) country database can take 700 MB of memory when loaded but can take as much as 3000 MB. A typical Global Type Ahead (GTA) database also takes about 700 MB of memory when loaded but rarely exceeds that value.

To download and install a Global Addressing database resource in the Spectrum Product Database (SPD) format:

1. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.
2. The database is downloaded as a zip file. Unzip the database before proceeding with the installation.
3. Install the SPD files:

- a) Place the SPD files in *SpectrumDirectory/server/import*. This is the default location for SPD files. The Spectrum Technology Platform server monitors this folder and looks for new files in two-second intervals.

You can change the location of the data import directory by altering the **spectrum.import.dir** property in the *SpectrumDirectory/server/conf/spectrum-container.properties* file.

- b) When the server detects new SPD files, the server automatically extracts the SPD files to *SpectrumDirectory/server/ref-data*.

You can change the location of the data storage folder by altering the **spectrum.data.manager.storage.dir** property in the Data Manager settings section of the *SpectrumDirectory/server/conf/spectrum-container.properties* file.

4. At this point the data will become available and you can add it as a Spectrum database resource in the **Spectrum Databases** section of Management Console.
5. After you install the database files, use either the Database Resource tool in the Management Console or the Global Addressing Administration Utility database commands to define the database as a resource.
6. After the SPD files are extracted and are no longer needed, use the CLI commands to delete the SPD files. Do not manually delete the SPD files from the location where the server extracted the SPD files. Instead, use these CLI commands to delete the SPD files. For more information about the Product Data CLI commands, see Administration Utility in your Spectrum Technology Platform *Administration Guide*.
 - a) Run the `productdata list` command to view the details for the currently installed SPD files. The results provide current information without having to access the file system. We suggest that you run this command before you run the `productdata delete` command, to make an informed decision about the data to delete.
 - b) Run the `productdata delete` command to delete the SPD files from the Spectrum Technology Platform.

Example

```
productdata delete --p productName --c productComponent --q qualifier --v dataVintage
```

```
spectrum> productdata delete --p gam --c gav --q GAV-DEU --v 201907
```

Installing Global Sentry Database

These databases are required to run Global Sentry in real-time mode:

- ofac.db
- pep.db

- sanctions.db

These files are required to run Global Sentry in batch mode:

- globalsentrydb.addresses-ofac.csv
- globalsentrydb.fullNames-ofac.csv
- globalsentrydb.ids-ofac.csv
- globalsentrydb.names-ofac.csv
- globalsentrydb.addresses-pep.csv
- globalsentrydb.fullNames-pep.csv
- globalsentrydb.ids-pep.csv
- globalsentrydb.names-pep.csv
- globalsentrydb.addresses-sanctions.csv
- globalsentrydb.fullNames-sanctions.csv
- globalsentrydb.ids-sanctions.csv
- globalsentrydb.names-sanctions.csv

In addition, you must install the **Data Normalization** and **Advanced Matching** databases to use Global Sentry. For instructions, see [Installing Data Normalization Databases](#) on page 105 and [Installing Advanced Matching Database](#) on page 104.

Ensure the Global Sentry Database Server is in up and running. In case it is not, use the option in the utility to start it before you begin data loading.

Note: You need to perform data loading after every upgrade of Spectrum Technology Platform.

1. Stop the Spectrum Technology Platform server.
2. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication.

Note: The data downloads as a zip file. Unzip the database before proceeding with the installation.

3. Select **Start > Programs > Precisely > Spectrum Technology Platform > Modules > Global Sentry > Global Sentry Database Load Utility**.
4. Follow the prompts during the rest of the installation process.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

5. Start Spectrum Technology Platform. To do this, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Start Server**.
6. After installing Global Sentry database, you must configure a JDBC connection in the Spectrum Technology Platform Management Console. Go to **Start > Settings > Control Panel > Administrative Tools > Services** to verify that the Global Sentry Database is running.

7. Log in to the **Management Console** and configure the driver and connection properties using these steps:

- a) In a web browser go to this URL:

`http://server:port/managementconsole`

Where *server* is the server name or IP address of your Spectrum Technology Platform server and *port* is the HTTP port used by Spectrum Technology Platform. By default, the HTTP port is 8080 and the HTTPS port is 8443.

- b) Enter your user name and password to access the **Home** page of the **Management Console**.
- c) On the Main Menu, click **Systems > Drivers** to open the **Drivers** page
- d) Click **Add**
- e) Type these JDBC properties in the applicable text boxes:
- JDBC driver configuration name: HSQLDB
 - JDBC driver class name: org.hsqldb.jdbcDriver
 - Connection string template: jdbc:hsqldb:hsqldb://\${host}:\${port}/\${instance}
- f) Add this driver file:
- `SpectrumDirectory/GlobalSentryDatabase/lib/hsqldb.jar`
- g) To define connection properties, go to **Resources > Data Sources**.
- h) Click **Add**, and define these connection properties:
- Connection name: Global Sentry
 - Database driver: select the HSQLDB JDBC driver that you created in the previous steps.
- i) Enter these values in the **Connection Properties** dialog box:
- host: localhost or *server name*
 - port: 9001
 - instance: globalsentrydb
- j) Click **Test** to verify the connection works.
- k) Click **OK**, then click **Save**

Installing Routing Databases

Spatial routing database resources are used by Find Nearest, Get Travel Boundary, Get Travel Cost Matrix, Get Travel Directions, Get Route Data, and Persistent Update.

To install routing Spectrum Product Data (SPD) data from Precisely, you must:

1. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.

2. Use Command Line Interface (CLI) commands to install the routing Spectrum Product Data to a Spectrum database. This copies the data to the Spectrum database and makes the Spectrum Technology Platform aware of the data in the database. For details, see [Adding Routing Data to Spectrum](#) on page 118.
3. In Management Console, create a new database resource for the routing Spectrum Product Data, or change an existing database resource to include the routing Spectrum Product Data. A database resource is how you add the data to projects. For details, see [Creating a Routing Database Resource](#) on page 120.

If you are installing Spectrum Product Data for the first time, because you are a new customer to the Spectrum Technology Platform or setting up a new Spectrum server, then we recommend you set the data extract and archive locations before installing Spectrum Product Data. For details, see [SPD Setup on a New Spectrum Server](#) on page 97. We recommend using the `productdata extract register` and `productdata archive register` commands to ensure that the Spectrum Product Data, which may be large, resides in an appropriate and manageable location of your choosing on the server. The default location inside the Spectrum folders can make upgrades and re-installations more difficult and require even greater temporary space.

Adding Routing Data to Spectrum

You must be a Spectrum Technology Platform administrator (admin) to perform this task.

To install routing Spectrum Product Data (SPD):

1. Verify that the Spectrum Technology Platform server is running before you begin.
2. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com. If the download is a zip file, extract it to a temporary location.
3. Open a command-line window.
4. Connect to the Spectrum Technology Platform server by typing this command:

```
connect --h servername:port --u username --p password --s SSLtrueFalse
```

For example,

```
connect --h myserver:8080 --u admin --p myPassword1 --s false
```

5. Install the routing data to the Spectrum server by typing:

```
productdata install --f fileOrDirectory --w waitOrReturn
```

For example:

```
productdata install --f C:/Downloads/C1A122018/CA_Driving.spd --w
```

To import and extract multiple Spectrum Product Data (.spd) files, when installing both pedestrian and driving data for example, provide the path to the folder:

```
productdata install --f C:/Downloads/C1A122018 --w
```

6. Run the following command to view information about the Spectrum data:

```
productdata list
```

This command lists all the information related to Spectrum Product Data (SPD), which are:

- a. PRODUCT
- b. COMPONENT
- c. QUALIFIER
- d. VINTAGE
- e. EXPIRATION
- f. DESCRIPTION
- g. IDENTIFIER

7. Run one of the following commands to generate a template for adding Spectrum data to Spectrum.

- Run the following command to create a template file (.json file) in the current directory:

```
ermdb template
```

- Alternatively, include the file name with the command to export the template to a specific location:

```
ermdb template path of the directory
```

For example:

```
ermdb template C:/Downloads/Templates/ermdbresource.json
```

The current file folder or the path you specified now has a template file (.json) that contains information like:

```
[{"product": "Spatial",
  "module": "routing",
  "name": "enter database name",
  "properties": {"isSPD": "true",
    "DatasetPaths": "${spectrum.spd.Spatial/routing/add IDENTIFIER from
productdata list};"},
  "maxActive": 4}
```

8. Configure the JSON template (.json) file by adding the database display name for the name tag and adding the IDENTIFIER information from running `productdata list` (in [step 2](#)) to the DatasetPaths tag.

For example:

```
[{"product": "Spatial",
  "module": "routing",
  "name": "Austria",
  "properties": {"isSPD": "true",

  "DatasetPaths": "${spectrum.spd.Spatial/routing/Alt_Pedestrian_Mar_2019};"},
  "maxActive": 4}]
```

9. Save your changes to the template file.
10. Run the `import` command to add the SPD to the Management Console.

```
ermdb import --f path_to_JSON_template
```

For example, if the template is stored in a JSON file named `ermdbresource.json`, then the command will look like:

```
ermdb import --f C:/Downloads/File/ermdbresource.json
```



You are now ready to create a database resource for the routing data as described in [Creating a Routing Database Resource](#) on page 120.


For more information about these Product Data CLI commands, see *Product Data* and *Spatial and Routing Databases* in the *Spectrum Technology Platform Administration Guide*.

Creating a Routing Database Resource

You must be a Spectrum Technology Platform administrator (admin) or Spatial administrator (spatial-admin) to perform this task. If you are a Spatial sub-administrator (spatial-sub-admin), then you must have permission to the folder that you are adding to or editing.

To create a routing database resource for Spectrum:

1. In Management Console, go to **Resources > Spectrum Databases**.
2. Click the **Add** button  to create a new database resource, or change an existing database resource by clicking the **Edit** button .

Note: You can create a new database resource by copying an existing one by clicking the **Copy** button .

3. If you are creating a new database, enter a name for the database resource in the **Name** field.

The name can be anything you choose. If you create a new database by copying an existing one, then rename it. You cannot modify the name of an existing database resource, because any services or jobs that reference the database resource by its original name would fail.

4. Change the **Pool Size** value if needed, by specifying the maximum number of concurrent requests you want this database to handle.

Note: This setting represents the number of threads on the components that are listening for service requests from the Spectrum Technology Platform for executing a Spatial routing stage (that is, the maximum number of managed connections). Every web service request enters Spectrum from the platform and passes to the components. To accommodate greater request loads, increase the default value (which is 4). We recommend a pool size that matches the number of CPUs. The maximum setting should not go above twice the number of the CPU core; for example, on a 4 CPU machine, the combined number of threads for all services should not exceed 8. Run performance tests with various settings to find the optimal performance.

5. Specify the **Min memory (MB)** and **Max memory (MB)** heap memory values.
6. In the **Module** field, select **Spatial**.
7. In the **Type** field, select **Enterprise Routing**.
8. From **Network Type**, select the type of network that is applicable for the database. You can choose between **Driving** and **Pedestrian**.
A list of available databases appears in the table below. Each database is listed with its description and vintage.
9. Select the databases from the list.
To find out more about installing Spectrum data, see [Installing a Spectrum Database](#) on page 97.
10. Select **Override advanced settings** if applicable. This feature lets you override settings such as additional command-line arguments when starting process, properties, and environment variables for remote process.
11. Click **Save** to add the database.
A list of the Spectrum databases and their status displays. (It may take a moment to refresh the **Status** column.)

The database resource now displays in the list of available database resources for Route, Travel Boundary, Cost Matrix, Find Nearest, Get Travel Boundary, Get Travel Cost Matrix, Get Travel Directions, and Get Route Data.

Installing Universal Addressing Databases

Note: This section is valid only for users of *UAM- US* , *UAM- Canada*, *UAM- International*, *Loqate*, and *Validate Address Global*.

You can download and install Universal Addressing (UAM) databases in the Spectrum Product Database (SPD) format. You cannot install older databases or vintages. After upgrading to Spectrum Technology Platform version **2020.1** from any previous version, you must delete and reconfigure all the previously configured databases using SPDs.

This procedure describes how to download and install Universal Addressing databases in the Spectrum Product Database (SPD) format from the Precisely.

Disk Space

The disk space requirements for extracted and non-extracted SPD bundles are:

- Extracted bundles (all SPD) - 50 GB
- Non-extracted bundles (all SPD) - 20 GB

To download and install a Universal Addressing database resource in the Spectrum Product Database (SPD) format:

1. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.
2. Install the SPD files:
 - a) Place the SPD files in *SpectrumDirectory/server/import*. This is the default location for SPD files. The Spectrum Technology Platform server monitors this folder and looks for new files in two-second intervals.
You can change the location of the data import directory by altering the **spectrum.import.dir** property in the *SpectrumDirectory/server/conf/spectrum-container.properties* file.
 - b) When the server detects new SPD files, the server automatically extracts the SPD files to *SpectrumDirectory/server/ref-data*.
You can change the location of the data storage folder by altering the **spectrum.data.manager.storage.dir** property in the Data Manager settings section of the *SpectrumDirectory/server/conf/spectrum-container.properties* file.
 - c) By default, the SPD files will be archived in *SpectrumLocation/server/archive/ref data*.
3. At this point the data will become available and you can add it as a Spectrum database resource in the **Spectrum Databases** section of Management Console.
4. After you install the database files, use either the Database Resource tool in the Management Console or the Administration Utility database commands to define the database as a resource.
5. After the SPD files are extracted and are no longer needed, use the CLI commands to delete the SPD files. Do not manually delete the SPD files from the location where the server extracted the SPD files. Instead, use these CLI commands to delete the SPD files. For more information about the Product Data CLI commands, see Administration Utility in your Spectrum Technology Platform *Administration Guide*.
 - a) Run the `productdata list` command to view the details for the currently installed SPD files. The results provide current information without having to access the file system. We

suggest that you run this command before you run the `productdata delete` command, to make an informed decision about the data to delete.

- b) Run the `productdata delete` command to delete the SPD files from the Spectrum Technology Platform.

Example

```
productdata delete --p productName --c productComponent --q qualifier --v dataVintage
```

```
spectrum> productdata delete --p Universal Addressing Module --c  
c6p --q UAM-CAN --v SEP2019
```

Installing Validate Address Global Databases

This procedure describes how to install the databases used by the Validate Address Global stage. For instructions on installing databases used by other Universal Addressing stages, see the *Spectrum Technology Platform Administration Guide*.

1. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.
2. The SPD files are:
 - VAGlobal-EMEA.spd—Contains the data for Europe, Middle East, and Africa.
 - VAGlobal-APAC.spd—Contains the data for Asia-Pacific.
 - VAGlobal-Americas.spd—Contains the data for the Americas.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing the databases on a network rather than accessing the databases locally.

3. Stop the Spectrum Technology Platform. To do this, open the Windows system tray and select **Stop Spectrum**.
4. Install the unlock code:
 - a) Open the following file in a text editor:


```
SpectrumDirectory\server\modules\addressglobal\conf\unlockcodes.txt
```
 - b) Enter your unlock codes, one per line.
 - c) Save and close the file.
5. Start Spectrum Technology Platform. To do this, right-click the Spectrum Technology Platform icon in the system tray and select **Start Spectrum**.

Installing Validate Address Loqate Databases

This procedure describes how to install the databases used by the Validate Address Loqate stage. For instructions on installing databases used by other Universal Addressing stages, see the *Spectrum Technology Platform Administration Guide*.

1. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.
2. The database SPD files are:
 - LQ0 — Contains a separate lib file for the Windows installation of data in the .spd file format. Irrespective of which Windows and non-Windows platform you are using, there will be a different lq0 file (lib file) for these platforms:
 - Win-LQ0_win
 - Linux- LQ0_Linux
 - LQ0/DB_Setup—Contains general database setup files.

Note: Regardless of which set of data you use, the files in LQ0 must be installed.

- LQ1-APAC_AFR_ME—Contains the data for Asia-Pacific, Africa, and Middle East.
- LQ2-Americas—Contains the data for Americas regions.
- LQ3-Europe—Contains the data for Europe region.

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

You may install databases on a network share, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

3. The database is downloaded as a .spd file. Install the SPD file:
 - a. Place the SPD files at *SpectrumLocation/server/import*. This is the default location for the SPD files. The *Spectrum Technology Platform* server monitors this folder and looks for new files in two-second intervals. You can change the location of the data import directory by altering the `spectrum.import.dir` property in this file:
SpectrumLocation/server/conf/spectrum-container.properties.
 - b. When the server detects new SPD files, the server automatically extracts the SPD files to *SpectrumLocation/server/ref data*. You can change the location of the data storage folder by using the command line interface (CLI).
 - c. By default, the SPD files will be archived in *SpectrumLocation/server/archive/ref data*.
4. At this point the data will become available and you can add it as a *Spectrum Technology Platform* database resource in the **Spectrum Databases** section of **Management Console**.

Installing Universal Name Databases

The Universal Name provides a load utility to install databases. The database files that you load depend on the databases you have licensed.

Note: To install the Universal Name databases on Windows Server 2008 you need administrator privileges.

1. Make sure no applications are running.
2. Stop the Spectrum Technology Platform server.
3. Download your Spectrum Product Database (SPD) format files from Precisely using the link provided in the Precisely communication or from data.precisely.com.
4. If the database is downloaded as a zip file. Unzip the database before proceeding with the installation.
5. Select **Start > Programs > Precisely > Spectrum Technology Platform > Modules > Universal Name and Advanced Matching > Universal Name and Advanced Matching Database Load Utility**.
6. Follow the prompts to complete the installation process. The database files are you can install are:
 - Arabic Plus Pack: `g1-cdq-cjki-arabic-<date>.jar`
 - Asian Plus Pack - Chinese: `g1-cdq-cjki-chinese-<date>.jar`
 - Asian Plus Pack - Japanese: `g1-cdq-cjki-japanese-<date>.jar`
 - Asian Plus Pack - Korean: `g1-cdq-cjki-korean-<date>.jar`
 - Core Names Database: `g1-cdq-nomino-base-<date>.jar`

Note: You may install databases on a mapped drive, but performance will be affected since you will be accessing them on a network rather than accessing them locally.

7. To load the complete Core Names Database, you must also install Open Parser and Table Lookup data from the Data Normalization Database Load Utility.
 - a) Select **Start > Programs > Precisely > Spectrum Technology Platform > Modules > Data Normalization > Database Load Utility > Open Parser**.
 - b) Follow the prompts to complete the installation process. The database file you need to install is:
 - `cdq-OpenParser-EnhancedNames.tba`
 - c) Select **Start > Programs > Precisely > Spectrum Technology Platform > Modules > Data Normalization > Database Load Utility > Table Lookup**.
 - d) Follow the prompts to complete the installation process. The database file you need to install is:

- `cdq-TableLookup-EnhancedGenderCodes.tba`
8. Open the file `SpectrumDirectory\server\bin\wrapper\wrapper.conf` in a text editor.
 9. Increase the Java settings for initial heap size (`wrapper.java.initmemory`) and maximum heap size (`wrapper.java.maxmemory`) to reflect the total amount of memory required for the Arabic Plus Pack and Asian Plus Pack.
 - Arabic Plus Pack: 5.5 GB
 - Asian Plus Pack - Chinese: 32 MB
 - Asian Plus Pack - Japanese: 1.6 GB
 - Asian Plus Pack - Korean: 8 MB
 - Core Names: 1.1 GB
 10. Save and close `wrapper.conf`.
 11. Start Spectrum Technology Platform. To do this, right-click the Spectrum Technology Platform icon in the Windows task bar and select **Start Server**.

Using the Database Silent Installer

The silent install process allows you to preconfigure the database installation process so that it runs without user intervention. Instead of responding to prompts from the installation process for information such as the installation location, you specify these responses in a properties file that the installer uses instead of user prompts.

Using the Loqate Database Silent Installer

1. In the Spectrum Technology Platform server installer (not the database installer), browse to the `SilentInstaller` folder.
2. Using a text editor, open the `uam_loqate.installer.properties` file.
3. Edit the properties file as necessary to specify the installation settings you want to use. See the comments in the properties file for additional information.
4. To run the installer in silent mode, place the properties file in any directory except the location where you are going to install the Loqate data and give the absolute path to the property in the command prompt, as follows:

```
install.bat %PathOfPropertyFile%\uam_loqate.installer.properties
```

7 - Client Tools

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Installing the Client Tools

The Spectrum Technology Platform client tools are applications that you use to administer your server and design and run dataflows and process flows. You must install your Spectrum Technology Platform server before installing the client tools.

Before installing, be sure to read the release notes. The release notes contains a list of known issues, important compatibility information, and release-specific installation notes.

This procedure describes how to install the client tools:

- **Enterprise Designer** allows you to create, modify, and run dataflows.
- **Flow Designer** is the next-generation Web UI dataflow design tool. This release provides a technical *preview* version of Flow Designer.

Note: Enterprise Designer will be retired once Flow Designer contains the full feature set in a future release.

- **Job Executor** is a command line tool that allows you to run a job from a command line or script. The job must have been previously created and saved on Spectrum Technology Platform using Enterprise Designer or Flow Designer.
- **Process Flow Executor** is a command line tool that allows the execution of a process flow from a command line or script. The process flow must have been previously created and saved on Spectrum Technology Platform using Enterprise Designer or Flow Designer.
- **Administration Utility** provides command line access to several administrative functions. You can use it in a script, allowing you to automate certain administrative tasks. You can also use it interactively.

To install the client tools:

1. Open a web browser and go to the Spectrum Technology Platform Welcome Page at:

`http://servername:port`

For example, if you installed Spectrum Technology Platform on a computer named **myspectrumplatform** and it is using the default HTTP port 8080, you would go to:

`http://myspectrumplatform:8080`

2. Click **Platform Client Tools**.
3. Download the client tool you want to install.

Installing Enterprise Designer with a Silent Installer

The silent install process installs Enterprise Designer without user intervention. Instead of prompting the user for information such as the installation location, the installer uses preconfigured selections that you specify.

To use the silent installer you must first create an installer properties file by running the client installer and responding to the prompts. The resulting properties file can then be used to silently install Enterprise Designer on other computers.

1. Open a web browser and go to the Spectrum Technology Platform Welcome Page at:

```
http://servername:port
```

For example, if you installed Spectrum Technology Platform on a computer named **myspectrumplatform** and it is using the default HTTP port 8080, you would go to:

```
http://myspectrumplatform:8080
```

2. Click **Platform Client Tools**.
3. Click **Download Installer**.
4. Choose to save the file to a location on your computer.

Note: Save the installer on a Windows computer that does not already have Enterprise Designer installed. You will need to run the installer in order to specify the options you want to use in the silent install process.

5. Open a Windows command prompt.
6. In the command prompt, change directories to the directory where you saved the installer.
7. Execute the following command:

```
Setup.exe -r installer.properties
```

8. Respond to the installer prompts by selecting the options that you want to use when the installer runs silently.

For example, if you want the silent installer to install Enterprise Designer to `C:\Spectrum\EnterpriseDesigner`, specify `C:\Spectrum\EnterpriseDesigner` when prompted for an installation folder.

When the installer finishes running, a properties file named `installer.properties` is created in the same folder as the `Setup.exe` file.

9. Open the file `installer.properties` in a text editor.

10. Add the following on line 8 of the file:

```
INSTALLER_UI=silent
```

Note: This is case sensitive to be sure to enter it exactly as shown above.

11. Save and close the properties file.

You have now configured a properties file that will enable you to install Enterprise Designer silently.

12. To install Enterprise Designer silently, place `installer.properties` and `Setup.exe` in the same folder on the computer where you want to install Enterprise Designer and run `Setup.exe`. When the installer executes it will detect `installer.properties` and automatically run in silent mode.

Alternatively, you can place `installer.properties` in different directory and give the absolute path to the property in the command prompt using the `-f` argument, as follows:

```
Setup.exe -f PathOfPropertyFile\installer.properties
```

To upgrade Enterprise Designer

1. Uninstall the existing client tools by going to **Start > Precisely > Client Tools > Setup**.
2. Make sure that you have .NET 4.6 installed on the client machine.
This is a newer version of .NET than was required in previous releases. Note that Windows 10 comes with this version of .NET installed by default.
3. Download the client tools installer from the Spectrum Technology Platform welcome page, <http://SpectrumServer:Port>.
The default port is 8080.
4. Run the installer.

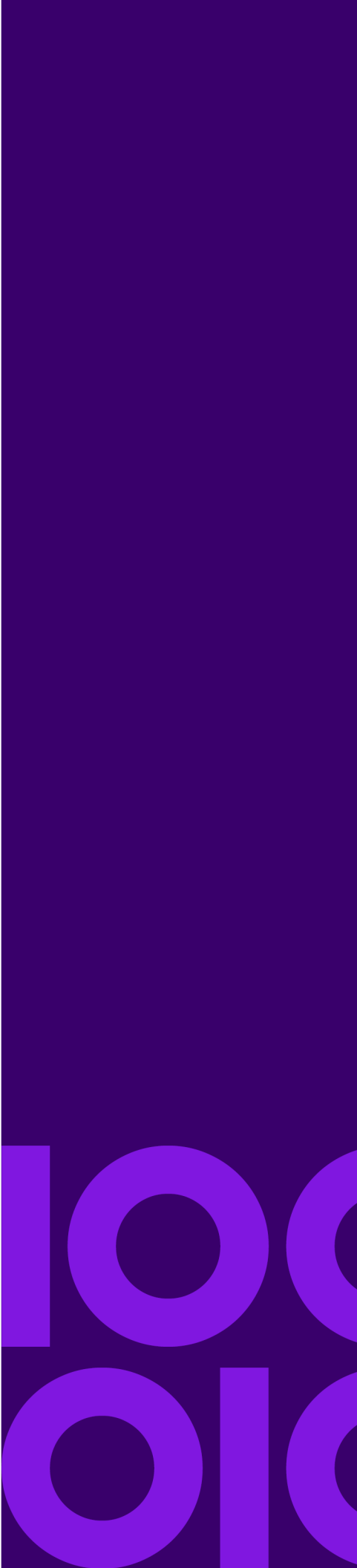
Removing Enterprise Designer

1. Back up any files you may need in the future.
2. Use the Windows Add/Remove Programs control panel to uninstall Enterprise Designer.

8 - Client API

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Installing the Client API

The Client API is used to integrate Spectrum Technology Platform functionality into your applications. If you will be creating your own program to call Spectrum Technology Platform, you need to install the Spectrum Technology Platform Client API on the system where you will be developing your application. The Client API allows access to Spectrum Technology Platform through several programming languages, including Java, C++, and web services.

1. Open the folder where you have downloaded the Spectrum Technology Platform Client API installer.
2. Double-click the file `sdkinst.exe`.
3. The installer guides you through the installation process.

Removing the Client API

Use the Windows Add/Remove Programs control panel to uninstall the Spectrum Technology Platform Client API.

9 - SAP and SugarCRM

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Configuring SAP

Integrating with SAP

To integrate Spectrum Technology Platform with SAP, you need to install supporting databases and dataflows on the Spectrum Technology Platform server, and then configure your SAP system to communicate with Spectrum Technology Platform. Once you do this, users of SAP will have access to address validation and geocoding functionality from within SAP.

1. On the Spectrum Technology Platform server, install the databases required to perform address validation, geocoding, and tax jurisdiction assignment and define database resources for each database.

You must give the database resources the following names.

| Database | Required Name for Database Resource |
|--|-------------------------------------|
| Enterprise Geocoding - Canada Database | IGEO_CAN |
| Enterprise Geocoding - U.S. Database | EGM_US |
| Enterprise Tax Database | ETM |
| Universal Addressing - Canada Database | Canada |
| Universal Addressing - Loqate Database | Loqate |
| Universal Addressing - U.S. Database | UAM_US |

2. When you install the SAP, several dataflow files are automatically installed. Other dataflow files must be manually copied into Spectrum Technology Platform.
 - a) If you are adding Enterprise Tax or Universal Addressing to an existing installation, open Spectrum Technology Platform Enterprise Designer, select **View > Server Explorer**, and delete this dataflow: SAPValidateAddressWithCandidates.
 - b) Go to: *SpectrumDirectory\server\modules\dataflows\sap*.
 - c) Review the following table then copy the applicable dataflow files to:

SpectrumDirectory\server\import

If you are installing this set of modules Copy these dataflow files to the import folder

| | |
|--|--|
| Universal AddressingModule | ValidateAddressWithCandidates_UAM.df SAPBatchValidateAddress.df |
| Enterprise Geocoding | ValidateAddressWithCandidates_EGM.df |
| Enterprise Geocoding Universal Addressing | ValidateAddressWithCandidates_UAM_EGM.df |
| Enterprise Tax Universal Addressing | ValidateAssignGeoTAXInfo.df SAPBatchAssignGeoTAXInfo.df SAPValidateAddressAndAssignGeoTAXInfo.df ValidateAddressWithCandidates_UAM_ETM.df |
| Universal Addressing without Loqate | SAPValidateAddressWithCandidate_UAM.df |
| Universal Addressing without Loqate Enterprise Tax | ValidateAssignGeoTAXInfo.df SAPBatchAssignGeoTAXInfo.df SAPValidateAddressAndAssignGeoTAXInfo.df ValidateAddressWithCandidates.UAM_ETM.df |
| Universal Addressing with Loqate | ValidateAddressWithCandidates_UAM_Loqate.df |
| Universal Addressing with Loqate Enterprise Geocoding | ValidateAddressWithCandidates_UAM_Loqate_EGM.df |
| Universal Addressing with Loqate Enterprise Tax | ValidateAddressWithCandidates_UAM_Loqate_ETM.df |

If you are installing this set of modules Copy these dataflow files to the import folder

| | |
|--|---|
| Universal Addressing with Loqate Enterprise Geocoding Enterprise Tax | ValidateAddressWithCandidates_UAM_Loqate_EGM_ETM.df |
|--|---|

| | |
|-----------------------------------|---|
| Universal Addressing, Loqate only | ValidateAddressWithCandidates_Loqate.df |
|-----------------------------------|---|

| | |
|---|---|
| Universal Addressing, Loqate only Enterprise Geocoding | ValidateAddressWithCandidates_Loqate_EGM.df |
|---|---|

| | |
|----------------------|---|
| Enterprise Geocoding | GeocodeUSAddressWithCandidates.df ValidateAddressWithCandidates_EGM.df |
|----------------------|---|

| | |
|----------------|--|
| Enterprise Tax | ValidateAssignGeoTAXInfo.df ValidateAddressWithCandidates_ETM.df SAPBatchAssignGeoTAXInfo.df |
|----------------|--|

Note: If errors occur in Management Console or Enterprise Designer, delete the contents of *WindowsTemporaryDirectory\glAssemblies*, where *WindowsTemporaryDirectory* is one of these: *%TMP%*, *%TEMP%*, *%USERPROFILE%*, or the *Windows directory*. Typically, *C:\Documents and Settings\USERNAME\Local Settings\Temp\glAssemblies*. After deleting the contents of this folder, log in again.

3. Import .SAR files.

A .SAR file is a file that contains a third-party add-on package for SAP, such as the Spectrum Technology Platform SAP. The .SAR file is located on the Spectrum Technology Platform installer in the *SAP Objects* folder. For information about importing .SAR files into SAP applications, see your SAP Basis administrator.

4. Activate the business configuration (BC) sets. The activation options and sequence differs for ECC and CRM installations.

a) **Activate BC sets for ECC and S/4 HANA installations**

1. Log on to the client where the settings for the Spectrum Technology Platform SAP is to be configured.

2. Enter the transaction code `SCPR20`. This activates BC sets and places the default entries on the Spectrum Technology Platform customizing tables.
3. In the **BC Set** field, enter keyword `*hsggrp1*` and find all the BC Sets in this namespace.
4. Activate it with the options **Overwrite All Data** and **Default Mode**.

5. Select and activate the BC sets with the activation options set to **Overwrite All Data** and **Expert Mode**

Note: Activate these BC sets in the order listed.

```

/HSGRP1/BCSET_BC_BAS_DES
/HSGRP1/BCSET_BC_BAS_GTX
/HSGRP1/BCSET_BC_BAS_PV
/HSGRP1/BCSET_BUPA_CUSTOM
/HSGRP1/BCSET_DQC_CUSTOM
/HSGRP1/BCSET_VENDOR
/HSGRP1/DD_TCODE
/HSGRP1/FUZZY_SEARCH_INPUT_PARAM
/HSGRP1/MERGE_SETTINGS
/HSGRP1/ONP_PO
/HSGRP1/SPOD_CON_TABLE
/HSGRP1/SPOD_IN_TABLE
/HSGRP1/SPOD_OPT_TABLE
/HSGRP1/SPOD_OUT_TABLE
/HSGRP1/SPOD_PO

```

b) **Activate BC sets for CRM installations where ICWC isn't required (IC Web Client)**

1. Log on to the client where the settings for the Spectrum Technology Platform SAP is to be configured.

2. Enter the transaction code `SCPR20`. This activates BC sets and places the default entries on the Spectrum Technology Platform customizing tables.
3. In the **BC Set** field, enter keyword `*hsggrp1*` and find all the BC Sets in this namespace.
4. Activate it with the options **Overwrite All Data** and **Default Mode**.

5. Select and activate the BC sets with the activation options set to **Overwrite All Data** and **Expert Mode**

Note: Activate these BC sets in the order listed.

```

/HSGRP1/BCSET_BC_BAS_DES
/HSGRP1/BCSET_BC_BAS_GTX
/HSGRP1/BCSET_BC_BAS_PV
/HSGRP1/BCSET_BUPA_CUSTOM
/HSGRP1/BCSET_DQC_CUSTOM
/HSGRP1/BCSET_VENDOR
/HSGRP1/DD_TCODE
/HSGRP1/FUZZY_SEARCH_INPUT_PARAM
/HSGRP1/HYBRID_CONFIG
/HSGRP1/MERGE_SETTINGS
/HSGRP1/ONP_PO
/HSGRP1/SPOD_CON_TABLE
/HSGRP1/SPOD_CON_ENTRY
/HSGRP1/SPOD_IN_TABLE
/HSGRP1/SPOD_OPT_TABLE
/HSGRP1/SPOD_OUT_TABLE
/HSGRP1/SPOD_PO
/HSGRP1/SPOD_SSE_ENTRY

```

5. Set up the RFC destination for Spectrum OnPremise.
 - a) Enter transaction code SM59.
 - b) Click **Create**.
 - c) In the **RFC Destination** field, enter a name of your choice.
 - d) In the **Connection Type** field, enter G (HTTP connection to external server).
 - e) In the **Description 1** field, enter a meaningful description.
 - f) Press the Enter key.
 - g) Click the **Technical Settings** tab.
 - h) In the **Target Host** field, enter the computer name or IP Address of the Spectrum Technology Platform server.
 - i) In the **Service No** field enter 8080.
 - j) Click the **Special Options** tab.
 - k) Select **No Timeout**.
 - l) Select **HTTP 1.1**.
 - m) After you save, click **Connection Test**.

Note: If there is a pop-up window, check the **Accept All Further Cookies** box and select YES.

- n) When the test is successful, go to the **Response Body** tab to view the Spectrum Technology Platform page.

Note: To setup RFC Destination for Spectrum OnDemand, see [Integration of SAP with Spectrum on Demand](#).

6. Set up the Spectrum Technology Platform Logging Object
 - a) Enter transaction code SLG0.
 - b) Click **New Entries**.
 - c) In the **Object** column, enter /HSGRP1/DQC.
 - d) In the **Object text** column, enter DQC Logging.
 - e) Save the change.
7. Configure the BuildGlobalAddress web service in the SAP Visual Admin:
 - a) Go to `drive:/usr./sap/system id/DVEBMGS01/j2ee/admin` and click *go.bat* and enter `J2EE_ADMIN` as password.
 - b) Go to **Cluster > Server > Services > JCo RFC Provider** and select the **Bundles** tab.
 - c) Enter all the information needed by the application and click **Set** to save the changes.
 - d) Go to **Cluster > Server > Services > Web Services Security**.
 - e) Create a proxy in **Web Services Client > sap.com > Dynamic WSProxies** with the name `ValidateAddressWithCandidates`.
 - f) For the URL, enter:

`http://spectrumservername:port/soap/ValidateAddressWithCandidates?wsdl`

For example,

`http://MySpectrumServer:8080/soap/ValidateAddressWithCandidates?wsdl`

- g) Restart the application server.
8. If you will be using French address validation, you must install the Data Normalization table `cdq-TableLookup-SAP.tba` on the Spectrum Technology Platform server. For more information, see the *Spectrum Technology Platform Installation Guide*.
9. To configure DPV and RDI options, open T-code `/hsgrp1/options`, and specify **Y** (to enable) or **N** (to disable), as needed.
 - **PVPO**: For PO Box address validation
 - **PVST**: For street address validation
 - **PVQU**: For batch address validation

Installing Support Files for Read from SAP

The Read from SAP stage reads data from an SAP database as input to a Spectrum Technology Platform dataflow. In order for the Read from SAP stage to access data in your SAP system you must make the following changes on your SAP system:

- Install the SAP Java Connector
- Install the SAP Transport Requests that support Read from SAP

Note: You will not be able to use the Read form SAP stage until you perform these steps.

1. Install the SAP Java Connector (SAP JCo).
 - a) Go to the SAP Marketplace and log in with your SAP Marketplace credentials.
 - b) Go to **SAP JCo Connector > Tools & Services**.
 - c) Download SAP JCo to your system.
 - d) Unzip the SAP JCo zip file to a temporary location.
 - e) Stop the Spectrum Technology Platform server.
 - f) Copy the `.jar` file to this folder on the Spectrum Technology Platform server:
`SpectrumDirectory\server\lib`
 - g) Copy the `.dll` file to this folder on the Spectrum Technology Platform server:
`SpectrumDirectory\server\bin\wrapper`
 - h) Start the Spectrum Technology Platform server.
2. Install the SAP Transport Requests that support Read from SAP.

Note: These steps should be performed by your SAP Basis administrator.

- a) In the Spectrum Technology Platform installer, go to the folder AP Data Integration Objects\Enterprise System Connectors.
- b) Deploy the SAP Transport Requests contained in this folder. See your SAP documentation for instructions on deploying SAP Transport Requests.

Integrating with SAP Interaction Center WebClient

Before continuing verify these:

- The Interaction Center WebClient user has the CRM_UI_PROFILE parameter ID with IC_AGENT as the Parameter Value
- The duplicate option is activated in SPRO under ICWC (**SPRO > CRM > ICWC > Define Account Identification Profiles**)

To integrate Spectrum Technology Platform with SAP Interaction Center WebClient, you need to install supporting databases and dataflows on the Spectrum Technology Platform server, then configure your SAP system to communicate with Spectrum Technology Platform. Once you do this, users of SAP Interaction Center WebClient will have access to address validation and geocoding functionality from within SAP Interaction Center WebClient.

Note: The SAP Interaction Center WebClient is supported only for new installations of Data Quality Connector.

1. On the Spectrum Technology Platform server, install the databases required to perform address validation, geocoding, and tax jurisdiction assignment and define database resources for each database.

You must give the database resources the following names.

| Database | Required Name for Database Resource |
|--|-------------------------------------|
| Enterprise Geocoding - Canada Database | IGEO_CAN |
| Enterprise Geocoding - U.S. Database | EGM_US |
| Enterprise Tax Database | ETM |
| Universal Addressing - Canada Database | Canada |
| Universal Addressing - Loqate Database | Loqate |
| Universal Addressing - U.S. Database | UAM_US |

2. When you install the SAP module, several dataflow files are automatically installed. Other dataflow files must be manually copied into Spectrum Technology Platform.
 - a) If you are adding Enterprise Tax or Universal Addressing to an existing installation, open Spectrum Technology Platform Enterprise Designer, select **View > Server Explorer**, and delete this dataflow: SAPValidateAddressWithCandidates.
 - b) Go to: *SpectrumDirectory\server\modules\dataflows\sap*.
 - c) Review the following table then copy the applicable dataflow files to:

SpectrumDirectory\server\import

If you are installing this set of modules Copy these dataflow files to the import folder

| | |
|--|--|
| Universal Addressing | SAPValidateAddressWithCandidates.df SAPValidateAddressWithCandidates.UAM.df |
| Enterprise Geocoding | SAPValidateAddressWithCandidates.EGM.df |
| Enterprise Geocoding Universal Addressing | SAPValidateAddressWithCandidates.UAM_EGM.df |
| Enterprise Tax Universal Addressing | SAPAssignGeoTAXInfo.df SAPBatchAssignGeoTAXInfo.df SAPValidateAddressAndAssignGeoTAXInfo.df SAPValidateAddressWithCandidates.UAM_ETM.df |
| Enterprise Geocoding Enterprise Tax Universal Addressing | SAPValidateAddressWithCandidates.UAM_ETM_EGM.df |
| Universal Addressing without Loqate | SAPValidateAddressWithCandidate_UAM.df |
| Universal Addressing without Loqate Enterprise Tax | SAPAssignGeoTAXInfo.df SAPBatchAssignGeoTAXInfo.df SAPValidateAddressAndAssignGeoTAXInfo.df SAPValidateAddressWithCandidates.UAM_ETM.df |

If you are installing this set of modules Copy these dataflow files to the import folder

| | |
|--|--|
| Universal Addressing with Loqate | ValidateAddressWithCandidates_UAM_Loqate.df |
| Universal Addressing with Loqate Enterprise Geocoding | ValidateAddressWithCandidates_UAM_Loqate_EGM.df |
| Universal Addressing with Loqate Enterprise Tax | ValidateAddressWithCandidates_UAM_Loqate_ETM.df |
| Universal Addressing with Loqate Enterprise Geocoding Enterprise Tax | ValidateAddressWithCandidates_UAM_Loqate_EGM_ETM.df |
| Universal Addressing, Loqate only | ValidateAddressWithCandidates_Loqate.df |
| Universal Addressing, Loqate only Enterprise Geocoding | ValidateAddressWithCandidates_Loqate_EGM.df |
| Enterprise Geocoding | GeocodeUSAddressWithCandidates.df ValidateAddressWithCandidates_EGM.df |
| Enterprise Tax | ValidateAssignGeoTAXInfo.df ValidateAddressWithCandidates_ETM.df SAPBatchAssignGeoTAXInfo.df |

Note: If errors occur in Management Console or Enterprise Designer, delete the contents of *WindowsTemporaryDirectory\glAssemblies*, where *WindowsTemporaryDirectory* is one of these: *%TMP%*, *%TEMP%*, *%USERPROFILE%*, or the *Windows directory*. Typically, *C:\Documents and Settings\USERNAME\Local Settings\Temp\glAssemblies*. After deleting the contents of this folder, log in again.

3. Import .SAR files.

A .SAR file is a file that contains a third-party add-on package for SAP, such as Spectrum Technology Platform SAP. The .SAR file is located on the Spectrum Technology Platform installer in the `SAP Objects` folder. For information about importing .SAR files into SAP applications, see your SAP Basis administrator.

4. **Activate BC sets for CRM installation where ICWC is required (IC Web Client) - You have already assigned `CRM_UI_Profile` parameter to the user with appropriate roles and authorization.**
 - a. Log on to the client where the settings for Spectrum Technology Platform SAP is to be configured.
 - b. Enter the transaction code `SCPR20`. This activates BC sets and places the default entries on the Spectrum Technology Platform customizing tables.
 - c. In the **BC Set** field, enter keyword `*hsggrp1*` and find all the BC Sets in this namespace.
 - d. Activate it with the options **Overwrite All Data** and **Default Mode**.

- e. Select and activate the BC sets with the activation options set to **Overwrite All Data** and **Expert Mode**

Note: Activate these BC sets in the order listed.

```

/HSGRP1/BCSET_BC_BAS_DES
/HSGRP1/BCSET_BC_BAS_GTX
/HSGRP1/BCSET_BC_BAS_PV
/HSGRP1/FUZZY_SEARCH_INPUT_PARAM
/HSGRP1/ICWC_SCRN_CFG
/HSGRP1/ICWC_SETTINGS
/HSGRP1/MERGE_SETTINGS
/HSGRP1/ONP_PO_CRM
/HSGRP1/SPOD_CONFIG
/HSGRP1/SPOD_IN_TABLE

```

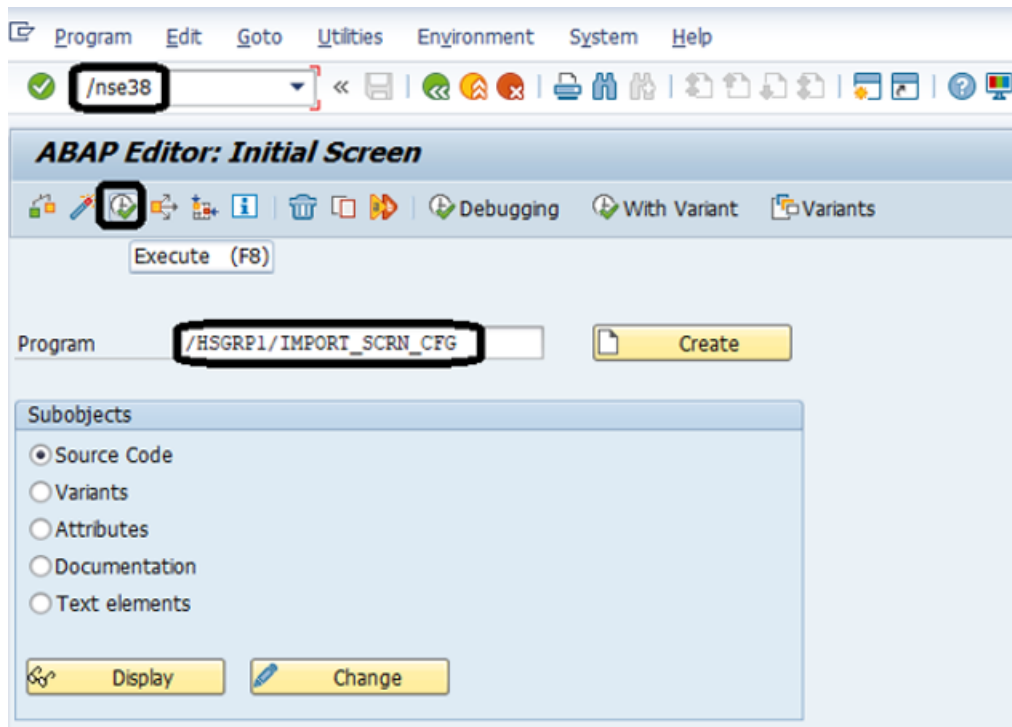

/HSGRP1/SPOD_OPT_TABLE
 /HSGRP1/SPOD_OUT_TABLE
 /HSGRP1/SPOD_PO_CRM
 /HSGRP1/SPOD_SSE_ENTRY

Note: Ignore any activation error or warnings with BC Set: /HSGRP1/ICWC_SCRN_CFG

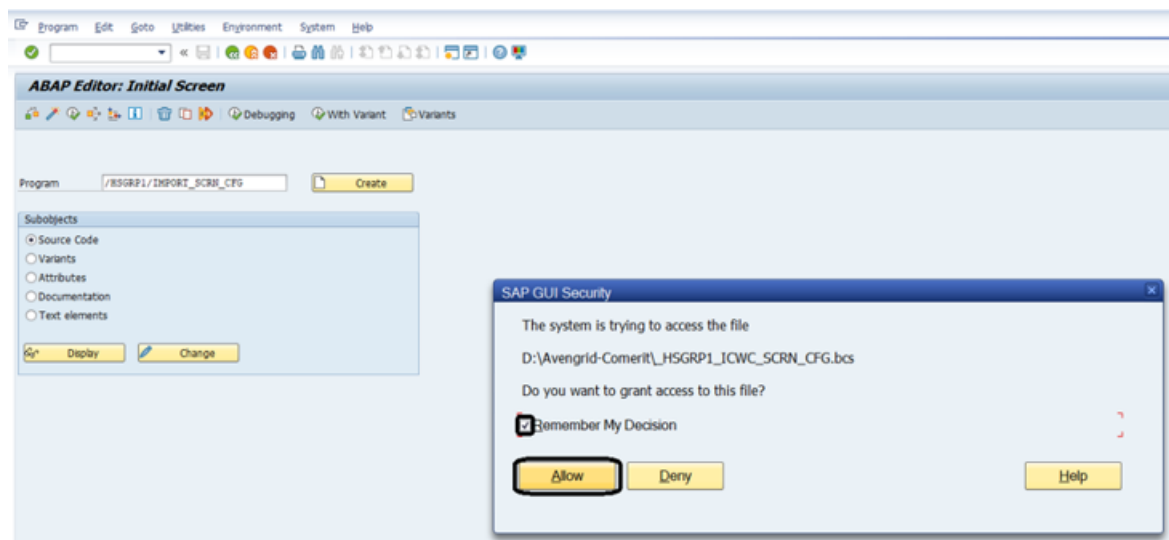
5. Set up the RFC destination for Spectrum OnPremise
 - a) Enter transaction code SM59.
 - b) Click **Create**.
 - c) In the **RFC Destination** field, enter a name of your choice.
 - d) In the **Connection Type** field, enter G (HTTP connection to external server).
 - e) In the **Description 1** field, enter a meaningful description.
 - f) Press the Enter key.
 - g) Click the **Technical Settings** tab.
 - h) In the **Target Host** field, enter the computer name or IP Address of the Spectrum Technology Platform server.
 - i) In the **Service No** field enter 8080.
 - j) Click the **Special Options** tab.
 - k) Select **No Timeout**.

Note: These steps are not valid for *Spectrum OnDemand* as it is not supported for ICWC.

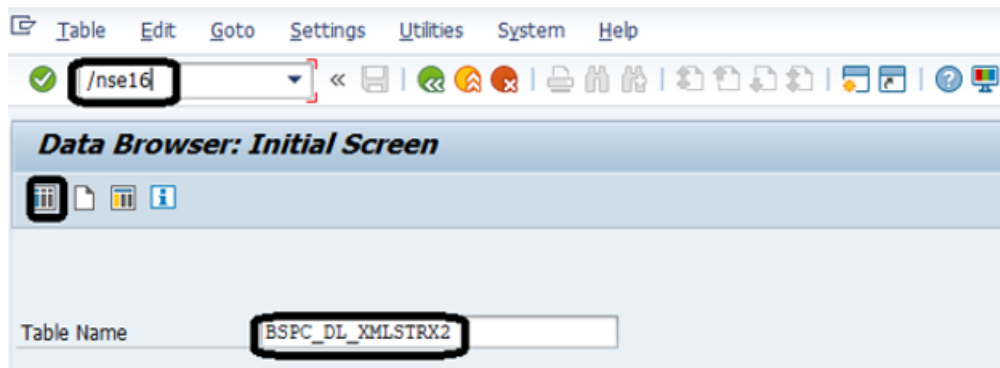
6. Use these steps to import the upload the ICWC configuration file (CQ7_All_Screen_Configurations.cfg). The file resides on the Spectrum Technology Platform installer at this location: SAP Objects\SAP CRM 7.0\data\inst_cs7.
 - a. On the initial screen, go to Tcode 'SE38' and enter ' /HSGRP1/IMPORT_SCRN_CFG '
 - b. Click **Execute**.



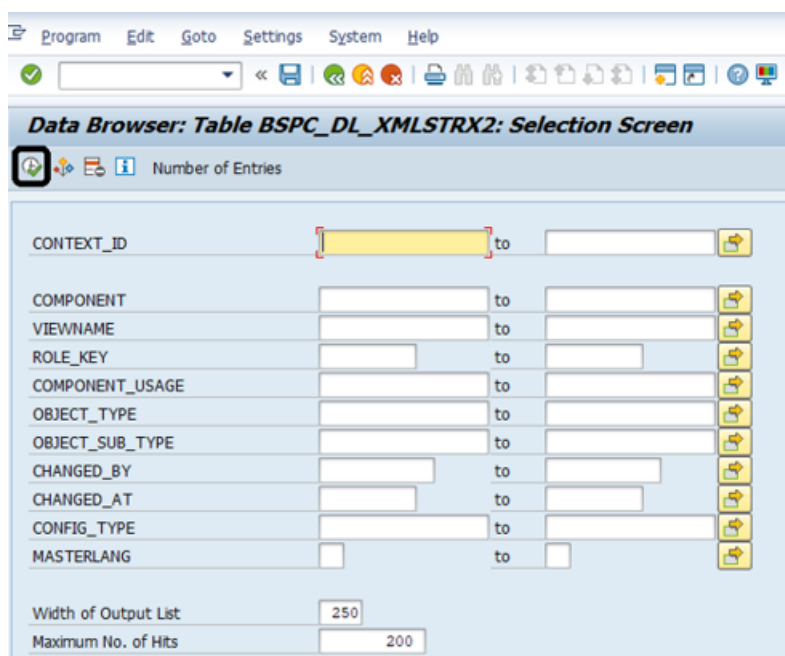
- c. Locate the CQ7_All_Screen_Configurations.cfg file and select it.
- d. Grant access as shown in the image below.



- e. Go to tcode SE16.
- f. Enter **Table Name** as BSPC_DL_XMLSTRX2.
- g. Click **Table Content** icon.



h. Click the **Execute** icon.



i. Check these entries:

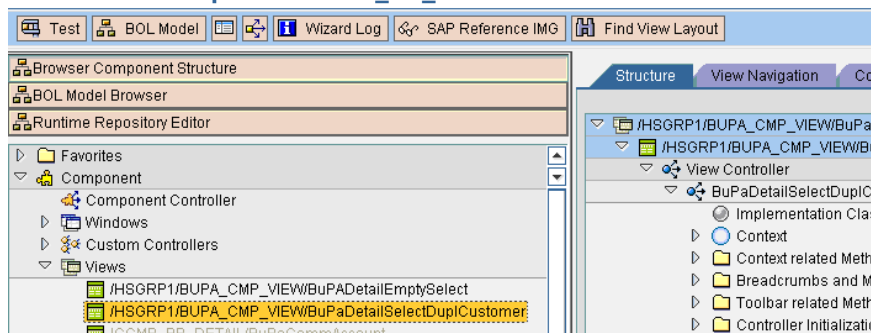
[illegible]

Note: Ignore errors or warning messages related to missing users, as shown in the image below.

| Report /HSGRP1/IMPORT_SCRN_CFG | | | | |
|--------------------------------|--|-----------------|---------------------|------------------------|
| Config for | 1A84D4F2EF74558AA39BB8015AEFF27B10AAA4EB | BP_ADDR | STANDARDADDRESS | Same as in the file |
| Config for | 26C90585C4D6015EB110A21BFF2A6D07476A71DE | BP_ADDR | STANDARDADDRESS | Same as in the file |
| Config for | 37603F62407D299C02F1DDE47E9AE535ECB9272F | ICOMP_BP_DETAIL | BUFADETAILB2B | Same as in the file |
| Config for | 3B4C5FF37DF76BC326639371F8EFC201710FB2F6 | BP_ADDR | STANDARDADDRESS | Same as in the file |
| Config for | 428849E22D366CF5518F5C9E307EF5C85CC5BE74 | ICOMP_BP_DETAIL | BUFADETAILB2B | Same as in the file |
| Config for | 43CA280EA21D6675D0FD4247A3773DB91F6459E7 | ICOMP_BP_DETAIL | BUFACREATE | Same as in the file |
| Config for | 461F764BEA84E5234197FE34301D2789A9AD2C85 | BP_ADDR | STANDARDADDRESS | Same as in the file |
| Config for | 49DFC66BF26764F7FE24536590C10B2A36490D70 | BP_ADDR | STANDARDADDRESS | Same as in the file |
| Config for | 4E920A6F815550BF0C3242CAE818A7CC6E7530C9 | ICOMP_BP_DETAIL | BUFADUPLICATECREATE | Same as in the file |
| E: Cfg for | 5B42A17ADB58C0820A8A2F9866ADA8483445442 | ICOMP_BP_DETAIL | BUFADUPLICATECREATE | GW_ADMIN was not found |

7. Set up the Spectrum Technology Platform Logging Object
 - a) Enter transaction code SLG0.
 - b) Click **New Entries**.
 - c) In the **Object** column, enter /HSGRP1/DQC.
 - d) In the **Object text** column, enter DQC Logging.
 - e) Save the change.
8. Enable the Precisely IC WebClient Enhancement Set.
 - a) Enter the transaction code SM30.
 - b) In the **Table/View** field, enter BSPWDV_EHSET_ASG.
 - c) Click **Maintain**.
 - d) Click **New Entries**.
 - e) In the **Client** field, enter the client number where the enhancement set will take effect.
 - f) In the **Enhancement Set** field, enter /HSGRP1/ENHANCEMENT_SET.
9. Add the IC WebClient Configurations.
 - a) Enter the transaction code BSP_WD_CMPWB.
 - b) In the **Component** field, enter ICCMP_BP_DETAIL.
 - c) Click the check icon.
 - d) In the **Enhancement Set** field, enter /HSGRP1/ENHANCEMENT_SET.
 - e) Click **Display**.
 - f) Expand the **Views** folder and select **/HSGRP1/BUPA_CMP_VIEW/BuPaDetailSelectDuplCustomer**.

Structure of Component ICCMP_BP_DETAIL - Enhancement Set /HSGRP1/E



- g) Click the **Configuration** tab.
 - h) On the edit screen select Full Name, Telephone, Street, City and Country context then click the right arrow button and arrange them in this order:
 - Full Name
 - Telephone
 - Street
 - City
 - Country
 - i) Save the configuration.
10. If you will be using French address validation, you must install the Data Normalization table `cdq-TableLookup-SAP.tba` on the Spectrum Technology Platform server. For more information, see the *Spectrum Technology Platform Installation Guide*.

Compatibility Matrix

These tables give a list of SAP add-on versions and system kernel levels that are compatible with the various releases of Spectrum Technology Platform for installation and upgrade of ECC 6.0 and CRM 7.0.

Table 2: Compatibility Matrix for New Deployment

| Spectrum Release | SAP Add-on Version | SAP System Kernel Level |
|------------------|--------------------|-------------------------|
| 12.x | 12.x | 741 and above |
| 2018.2 | 2018.2 | 741 and above |
| 2019.1/2020.1 | 2019.1 | 741 and above |

Table 3: Compatibility Matrix for Upgrade

| Spectrum Release | SAP Add-on Version | SAP System Kernel Level |
|-------------------------|---------------------------|--------------------------------|
| 12.x | 12.x | 741 and above |
| 2018.2 | 2018.2 | 741 and above |
| 2019.1/2020.1 | 2019.1 | 741 and above |

This table gives the compatibility matrix for new deployment of **SAP S/4 HANA 1610** for Spectrum Technology Platform:

| Spectrum Release | SAP S/4 HANA 1610 Add-on Version | SAP S/4 HANA 1610 System Component Level |
|-------------------------|---|---|
| New deployment | | |
| 12.x | 12.x | 751 (SAP_BASIS) 75B (SAP_ABA) |
| 2018.2 | 2018.2 | 751 (SAP_BASIS) 75B (SAP_ABA) |
| 2019.1/2020.1 | 2019.1 | 751 (SAP_BASIS) 75B (SAP_ABA) |

Note: It is recommended that you contact the Precisely representative or coordinator assigned to you before starting the process.

This table gives the compatibility matrix for new deployment of **SAP S/4 HANA 1709** for Spectrum Technology Platform:

| Spectrum Release | SAP S/4 HANA 1709 Add-on Version | SAP S/4 HANA 1709 System Component Level |
|-------------------------|---|---|
| New deployment | | |

| Spectrum Release | SAP S/4 HANA 1709 Add-on Version | SAP S/4 HANA 1709 System Component Level |
|------------------|----------------------------------|--|
| 12.x | 12.x | 752 (SAP_BASIS) 75C (SAP_ABA) |
| 2018.2 | 2018.2 | 752 (SAP_BASIS) 75C (SAP_ABA) |
| 2019.1/2020.1 | 2019.1 | 752 (SAP_BASIS) 75C (SAP_ABA) |

Note: It is recommended that you contact the Precisely representative or coordinator assigned to you before starting the process.

The **SAP Data Quality Connector** is certified for *ECC 6.0 EHP 7.0* and *CRM 7.0 EHP 3.0* with *HANA* database.

Configuring SugarCRM

Integrating with SugarCRM

To integrate Spectrum Technology Platform with SugarCRM, you must install the supporting databases and dataflows on the Spectrum Technology Platform server, and deploy Spectrum on your SugarCRM. Once you do this, users of SugarCRM will have access to address validation, geocoding, and duplicate detection functionality from within SugarCRM.

Before you begin:

Entities Supported:

You can validate and geocode the addresses of the entities:

- Accounts
- Contacts
- Leads

Supported SugarCRM Versions

SugarCRM 7.7.1.1

Browse to the the folder `Sugar CRM DQ Objects\sugarcrm` in the Spectrum Technology Platform installation package and copy the file `PreciselySugarCRMConnector.zip` to any location on your SugarCRM server.

1. If you are using Spectrum Technology Platform for address validation or geocoding, install the databases required to perform address validation and geocoding and define database resources for each database.

Note: If you are using Spectrum Technology Platform for duplicate detection only, you can skip this step.

You must give the database resources these names:

| Database | Required Name for Database Resource |
|--|-------------------------------------|
| Enterprise Geocoding - Canada Database | IGEO_CAN |
| Enterprise Geocoding - U.S. Database | EGM_US |
| Universal Addressing - Canada Database | Canada |
| Universal Addressing - Loqate Database | Loqate |
| Universal Addressing - U.S. Database | UAM_US |

Note: You must install the Delivery Point Validation (DPV) data and the Residential Delivery Indicator (RDI) data in order to perform DPV and RDI processing on U.S. addresses.

2. Import the SugarCRM module dataflows into your Spectrum Technology Platform server.

- a) On the Spectrum Technology Platform server, open this folder:

`SpectrumDirectory\server\modules\sugarcrm`

Note: This folder is only available if you have installed the SugarCRM module.

- b) As mentioned in the table below, copy the applicable dataflow files to the *import* folder:

`SpectrumDirectory\server\import`

If you have installed this set of modules Copy these dataflow files to the import folder

| | |
|---|--|
| Advanced Matching | <i>GenerateMatchKey.df</i> <i>GenerateMatchScore.df</i> <i>GenerateSearchKey.Consonant.df</i> <i>GenerateSearchKey.df</i> <i>GenerateSearchKey.Metaphone.df</i> <i>GenerateSearchKey.Substring.df</i> |
| Universal Addressing without Loqate | <i>ValidateAddressWithCandidates_UAM.df</i> |
| Universal Addressing without Loqate Enterprise Geocoding | <i>ValidateAddressWithCandidates_UAM_EGM.df</i> |
| Universal Addressing with Loqate | <i>ValidateAddressWithCandidates_UAM_Loqate.df</i> |
| Universal Addressing with Loqate Enterprise Geocoding | <i>SugarCRMValidateAddressAndGenerateMatchKey.df</i> <i>ValidateAddressWithCandidates_UAM_Loqate_EGM.df</i> |
| Universal Addressing, Loqate only | <i>ValidateAddressWithCandidates_Loqate.df</i> |
| Universal Addressing, Loqate only Enterprise Geocoding | <i>ValidateAddressWithCandidates_Loqate_EGM.df</i> |
| Enterprise Geocoding | <i>GeocodeUSAddressWithCandidates.df</i> |

3. Import the Precisely SugarCRM module into your SugarCRM system.
 - a) Log in to SugarCRM as an administrator.
 - b) In the profile drop-down menu at the top right corner, click **Admin**.
 - c) In this **Administration** screen, in the **Developer Tools** section, click **Module Loader**. The **Module Loader** screen opens.
 - d) If you are integrating your SugarCRM system with Spectrum Technology Platform for the first time, you must upload the SugarCRM Connector of your SugarCRM system:

1. Upload the ZIP file `PreciselySugarCRMConnector.zip` of Spectrum copied earlier to the system, using the file uploader field in the centre of the page.
 2. Click **Upload**.
 3. Click **Confirm**. An entry for the *Precisely* package now shows in the bottom grid.
- e) Once the *Precisely* package is uploaded into the system, or if it has been uploaded previously into your SugarCRM system but is uninstalled:
1. Click **Install** against the *Precisely* package entry in the bottom grid on the **Module Loader** screen.
 2. On the **License** screen, select **Accept**, then click **Commit**.
- f) In the profile drop-down menu at the top right corner, click **Admin**.
- g) In this **Administration** screen, in the **System** section, click **Repair**. The **Repair** screen opens.
- h) Click **Quick Repair and Build**.
The existing SugarCRM configurations are rebuilt to incorporate the custom Objects and Object Layouts imported with the SugarCRM Connector. The logs are displayed.

Spectrum's SugarCRM Connector is now successfully integrated with your SugarCRM system.

The menu item **Administration > Precisely Service Configuration** is now available.

Creating a Connection to Spectrum

Once Spectrum Technology Platform SugarCRMConnector is uploaded successfully in your SugarCRM, you can create a connection to the Spectrum server.

1. Log in to your SugarCRM system as an Administrator.
2. Go to **Administration > Precisely Service Configuration**.
3. Click **Create**.
4. In the **Name** field, enter the desired name for the connection. For example, `Precisely_SpectrumConnection`.
5. In the **Server Name** field, enter the server name or IP address of the Spectrum Technology Platform server.
6. In the **Port** field, enter the port used by the Spectrum Technology Platform server for HTTP communication. By default the port is 8080.
7. In the **User Name** field, enter the Spectrum Technology Platform user name.
8. In the **Password** field, enter the password for the Spectrum Technology Platform user.
9. If you wish to run the duplicate detection feature provided by the Spectrum Address Validation bundle:
 - Check **Duplicate Detection**.

- In the **Threshold** field, enter a value between 0 and 100, both inclusive. If you leave this field blank, the default threshold value of 30 is used. The Spectrum Address Validation service fetches those records as duplicate whose match score is equal to or higher than the *threshold* match score.

For more information, see [Threshold](#).

10. Before saving the connection, click **Test Connection** to verify the entered credentials for the Spectrum server.
11. Once the Spectrum connection details are tested successfully, click **Save**.

Note: You can either test a connection before clicking **Save**, or test an existing connection by first opting to **Edit** it.

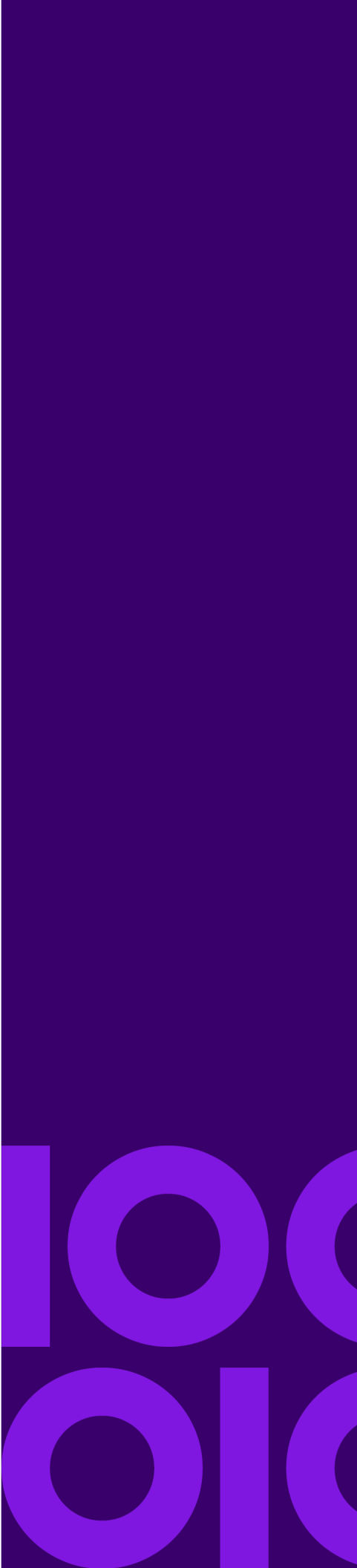
You can now use this connection to validate and geocode the addresses of records in your SugarCRM system using the Spectrum Technology Platform.

Note: Only one connection to the Spectrum Technology Platform can exist at a time. To create another connection to Spectrum Technology Platform, you can either delete the existing connection and create a new one, or edit the existing connection.

10 - Support

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Support

Technical Support

If you run into an issue, Precisely Technical Support can help guide you to a solution. When you contact Precisely Technical Support, please provide the following information:

- A description of the task you were performing
- The level or version of your operating system
- The patch level or service pack
- The log file located in your install directory at:
`SpectrumDirectory\server\logs\spectrum-server.log`

Contact information for Technical Support can be found at:

Welcome to MySupport (<https://mysupport.syncsort.com/>)

Note: If you purchased Spectrum Technology Platform through a third-party partner, please contact the partner for technical support.

Documentation

Product documentation can be found at:

docs.precisely.com

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