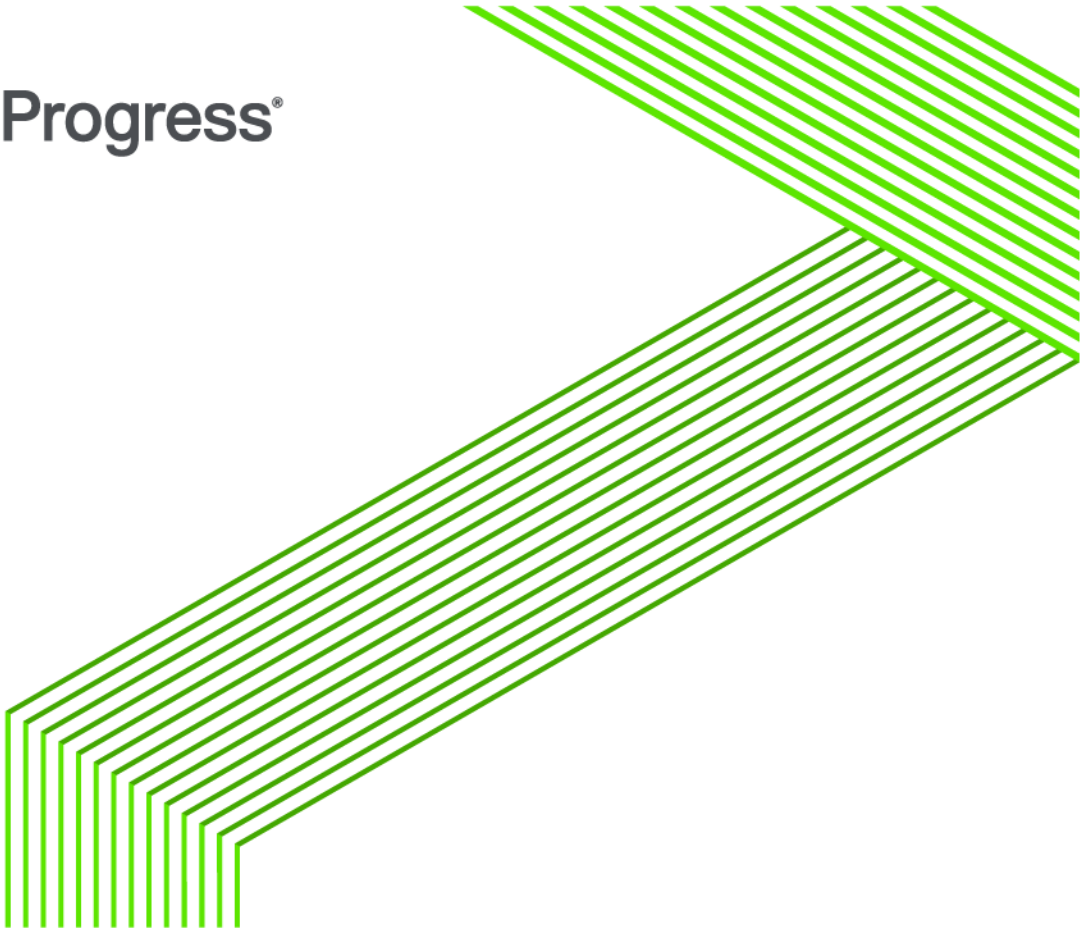
Progress®



Corticon
Installation Guide

Progress® Corticon®

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1

Overview of Corticon Installations

This guide presents procedures for accessing, downloading, and running Corticon 5.7 installers, as well as providing dynamic access to information about supported platforms. Links to the Progress Corticon KnowledgeBase provide additional information about third-party software setup.

Progress® Corticon® is the Business Rules Management System with the patented rules engine that enables you to automate sophisticated decision processes—without having to write code.

Progress Corticon products

Progress Corticon distinguishes its development toolsets from its server deployment environments.

- **Corticon Studio** is the Windows-based development environment for creating and testing business rules:
  - When installed as a standalone application, Corticon Studio provides a complete Eclipse development environment for Corticon in the **Corticon Designer** perspective. You can use this Eclipse installation as the basis for adding other Eclipse tools.
  - When installed into an appropriate existing Eclipse environment, Corticon integrates with installed Eclipse tools to enable you to develop Corticon applications in the **Corticon Designer** perspective.

  Note: Refer to the *Corticon Installation Guide* for details about integrating Corticon Studio into an existing Eclipse environment.

- **Corticon Servers** implement web services and in-process servers for deploying business rules defined in Corticon Studio:
  - **Corticon Server for Java** is supported on various application servers, and client web browsers. After you install it on a supported Windows platform, its deployment artifacts can be redeployed on various UNIX and Linux web service platforms as Corticon Decision Services.

- **Corticon Server for .NET** facilitates deployment of Corticon Decision Services on Windows .NET Framework and Microsoft Internet Information Services (IIS).
- **Corticon Web Console** enables administration of multiple remote Corticon Servers. A Web Console server is deployed into a Progress Application Server, and then is accessed by users through authenticated web browser connections.

For details, see the following topics:

- System requirements
- Downloading Corticon installer packages

System requirements

Progress Corticon products are supported on a variety of platforms and third-party components.

Corticon Studio

Refer to the Progress Software web page Progress Corticon 5.7 - Supported Platforms Matrix to review the currently supported Corticon Studio operating systems, and Eclipse versions.

The target system for a Corticon Studio installation requires:

- Supported Windows operating system
- 8 GB System RAM (minimum of 2 GB available RAM)
- 650 MB disk space
- When an existing Eclipse will be used, a supported Eclipse version

Corticon Server for Java

Refer to the Progress Software web page Progress Corticon 5.7 - Supported Platforms Matrix to review the currently supported platforms and application servers. Also see the Corticon KnowledgeBase entry Corticon Server 5.X sample EAR/WAR installation for different Application Servers for detailed instructions on configuring Apache Tomcat, JBoss, WebSphere, WebLogic on all supported platforms.

The target system for a Corticon Server for Java installation requires:

- Supported Windows or Linux operating system
- When deploying on other platforms, a supported operating system and application server
- 8 GB System RAM (minimum of 2 GB available RAM)
- 600 MB disk space

Corticon Server for .NET

Refer to the Progress Software web page Progress Corticon 5.7 - Supported Platforms Matrix for information on supported .NET Framework and IIS versions, and the Corticon Knowledgebase article appropriate for your target IIS/platform, as listed in the topic Preparing Corticon .NET Server resources for an IIS server on page 28.

The target system for a Corticon Server for .NET installation requires:

- Supported Windows operating system
- Supported .NET Framework and Internet Information Service (IIS)
- 8 GB System RAM (minimum of 2 GB available RAM)
- 500 MB disk space

Corticon Web Console

Refer to the Progress Software web page Progress Corticon 5.7 - Supported Platforms Matrix for information on supported browser versions.

The target system for a Corticon Web Console installation requires:

- Supported Windows or Linux operating system
- 4 GB System RAM (minimum of 2 GB available RAM)
- Java option for MaxPermSize set to at least 256m
- 600 MB disk space

Note: When all three Server components are installed on one machine, the required space for the installation is about 1 GB.

Downloading Corticon installer packages

The Corticon Studio installer package

For supported Windows machines: `PROGRESS_CORTICON_5.7_STUDIO_WIN_64.exe`

The Corticon Server and Web Console packages

Microsoft Windows

Corticon Server and Web Console 5.7 products for Windows -- Java Server, .NET Server, and Web Console -- are packaged in executable installer applications and ZIP archives.

For supported Windows machines, download: `PROGRESS_CORTICON_5.7_SERVER_WIN_64.exe`

Zip Archives

Corticon Server and Web Console .war files are available in a Corticon Server .zip archive. Use it to install the Server Console or Web Console on a supported application server without using the executable installers.

Linux

Corticon Server and Web Console 5.7 products for Linux -- Java Server, and Web Console – are packaged in executable installer applications for supported Linux machines:
`PROGRESS_CORTICON_5.7_SERVER_LNX_64.bin`

Perform downloads

To download required Corticon installers:

1. Get credentials to access and download packages on the Progress Software Electronic Software Download (ESD) site, .
2. Connect to the ESD, log in, and then navigate to the Corticon 5.7 page.
3. Locate, download, and save the required installers to a temporary location accessible by the target machine.

2

Preparing for a Corticon Installation

Before running installers

To avoid possible constraints on the installers, do the following:

- **Confirm that you have Administrator permissions on the target machine** - Administrator rights allow the installer to copy all the Corticon files to their proper locations. You must have Administrator rights and permissions to install this software. See your system administrator to obtain these rights.
- **Obtain system access** - Several Corticon features write files to the “home” directory structure. If the target machine for the Corticon installation does not have read and write access to this directory, you need to choose a directory location where Corticon will have both read and write access.
- **Disable anti-virus, anti-malware, and anti-spyware protection applications** - Before performing the installation, consider temporarily disabling any anti-virus and anti-spyware software that may be running on the target machine, as such software might interfere with correct installation.
- **Review the supported platforms** - Refer to the Progress Software web page Progress Corticon 5.7 - Supported Platforms Matrix to review the operating system versions for Corticon Server and Corticon Studio and supporting software.

For details, see the following topics:

- If you are evaluating Corticon...
- If you are upgrading Corticon...

If you are evaluating Corticon...

You can install Studio and Server, start them, and then get underway. The licensing will sustain you for a while:

- **Studio Licensing** - Corticon embeds a ninety-day evaluation license that enables development of business rules projects, as well as testing of the projects in an embedded test server. You must obtain Studio development licenses from your Progress representative.
- **Server Licensing** - Corticon embeds a limited evaluation license that enables testing of rule modeling projects on supported platform configurations. You must obtain server deployment licenses from your Progress representative. The license included in the default Corticon Server installation has pre-set limits on certain Corticon Server and Decision Service parameters. These limits are:
  - **Number of Decision Services** – Up to 20 Decision Services may be deployed at any given time. This means the sum total of all Decision Services loaded via `.cdd` files, Web Console, or APIs cannot exceed 20.
  - **Number of Rules** – All rules in all deployed Ruleflows (that is, all deployed Decision Services) must not exceed 500. A rule generally consists of a single Condition/Action Column or a single Action row in Column 0. Filter expressions do not count because they only modify other rules.

Note: The Corticon Server log can capture errors and exceptions caused by expired or under-strength licenses. These log messages are detailed in the *Using Corticon Server logs section of the Integration and Deployment Guide*.

If you are Progress Corticon customer, you should have access to an unlimited license that will lift these restrictions. If you are an evaluator, and discover that these limitations are preventing or inhibiting your evaluation, contact your Progress Software representative to get a license with expanded capabilities.

If you are upgrading Corticon...

Existing Corticon users advancing to this release will want to know whether their existing products can co-exist with the newer version, as well as any strategies for perpetuating the assets created in their current version.

If you have an existing installation of Corticon products on the target machine, backup all assets and workspaces, and then do the following:

- **For an upgrade of a 5.3.x, 5.4.x, 5.5.x, or 5.6.x installation to 5.7** - If you are upgrading from 5.3, 5.4, 5.5, or 5.6 installed software on the same machine, 5.7 will install to new location and run independent of the other releases. You must manage any port overloads that might result from running both versions. If you have a load balancing architecture, traffic can be redirected when a new Server version is installed next to a previous version. This architectural setup will incur no down time. A general recommendation should be to leave the previous version untouched until the new version is installed. It is good practice to backup all workspaces before proceeding.

  The topic Procedures for upgrading Corticon installations on page 29 presents a checklist sequence of tips and techniques that will ensure stable, current functionality in upgraded Studios and Servers.

- **For an upgrade of a 5.2 or earlier version 5 installation to 5.7** - An installed version of Corticon 5.2 or earlier installed on the target machine must be uninstalled, then the appropriate Corticon 5.7 product installed.

  We recommend that you consult with Progress Corticon Support or your Progress representative to discuss your migration strategies for existing assets before you take action.

- **For an upgrade of a 4.3 or earlier installation to 5.7** - Download and install Corticon Studio 5.3.0 or 5.4.0, and then perform the procedures in its *Corticon Migration Guide*. Once completed, uninstall the 4.3 installation, and install 5.7 where its upgrade utility can bring project assets up to date. We recommend that you consult with Progress Corticon Support or your Progress representative to discuss your migration strategies for existing assets before you take action.

3

Installing Corticon Studio

There are several techniques for installing Corticon Studio:

- Running the Corticon Studio installer wizard on page 14, the typical use, which enables a complete Corticon Studio Eclipse installation that can standalone, or be tailored into another Eclipse IDE on the same machine.
- Performing Silent Installations of Studio on page 17 that generates a file from an installer wizard run to let you perform silent Studio installations on other machines.
- Installing Corticon Studio plugins into an existing Eclipse on page 18 which enables scripted installation of Corticon Studio plugins into an existing Eclipse.

What Corticon Studio installers provide

The installer wizard package includes:

- Corticon Studio resources
- Eclipse Development Environment and Eclipse online documentation.
- Java Runtime Environment (JRE)
- Sample projects
- API documentation for extending Corticon
- Corticon Server runtime for use in testing rules you create in Corticon Studio

Installation options

A new Corticon Studio install lets you choose to install it standalone, or to add its plugins to an existing Eclipse 4.5 installation.

For details, see the following topics:

- Running the Corticon Studio installer wizard
- Performing Silent Installations of Studio
- Installing Corticon Studio plugins into an existing Eclipse
- Increasing Corticon Studio memory allocation
- Setting Studio to run in another language

Running the Corticon Studio installer wizard

The Studio installer will install or update Studio 5.7.

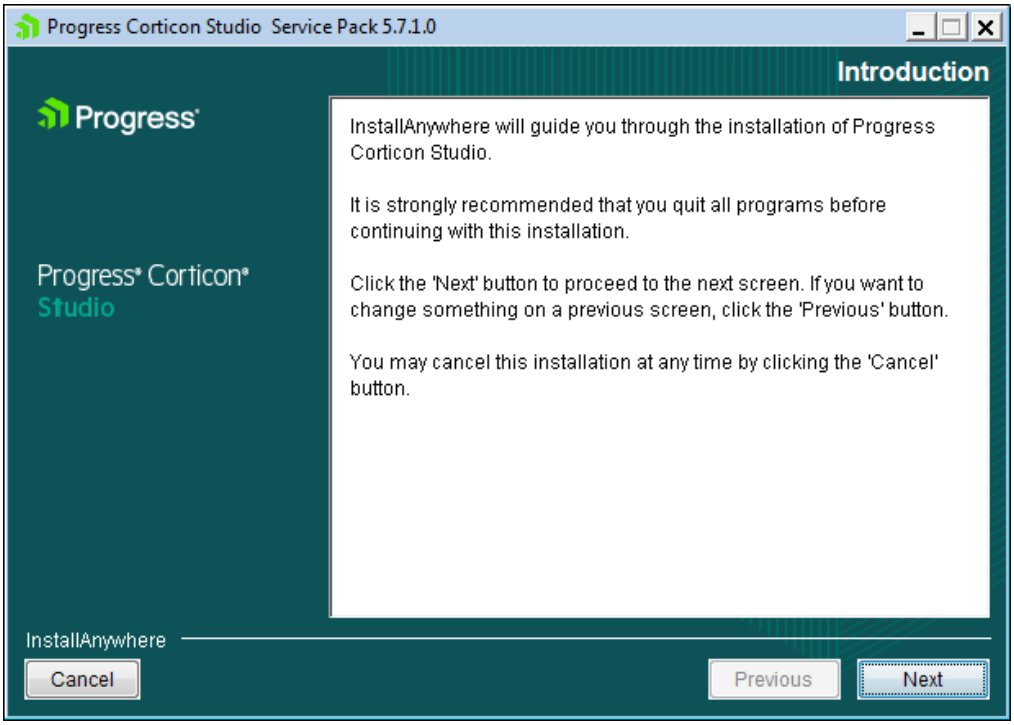
Installing or updating Studio 5.7

To perform a new installation of Corticon Studio 5.7:

1. Double click on the installer file, `PROGRESS_CORTICON_5.7_STUDIO_WIN_64.exe`, to launch the Corticon Studio installer.

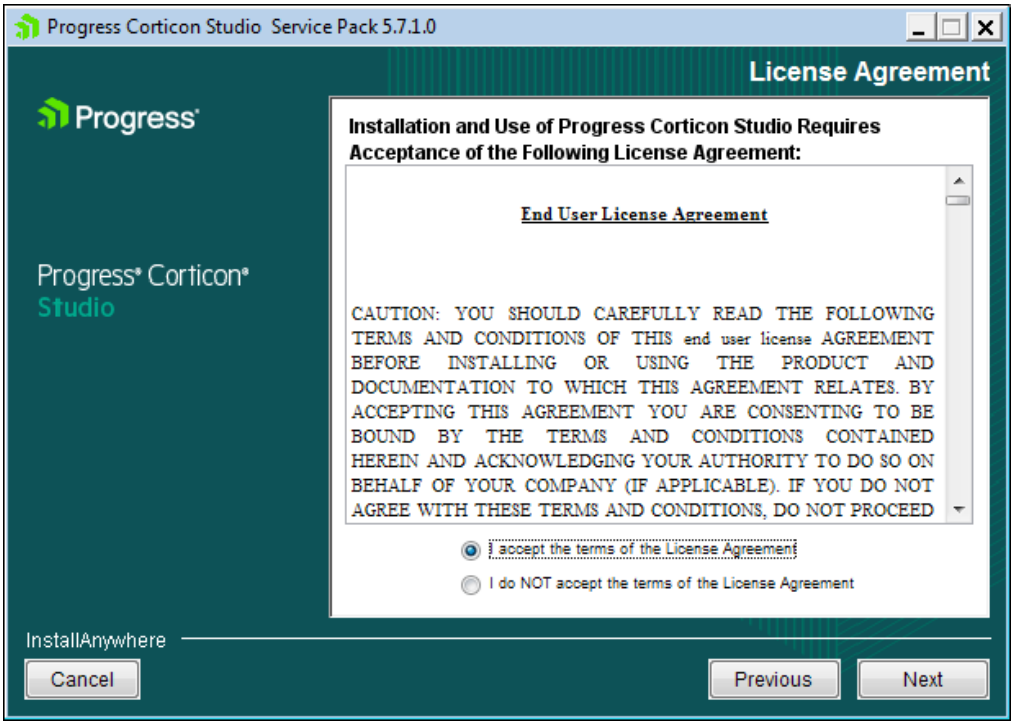
   The installer opens in the installer wizard.

2. The first installer panel opens with information about the installer.



3. Click **Next** to continue.

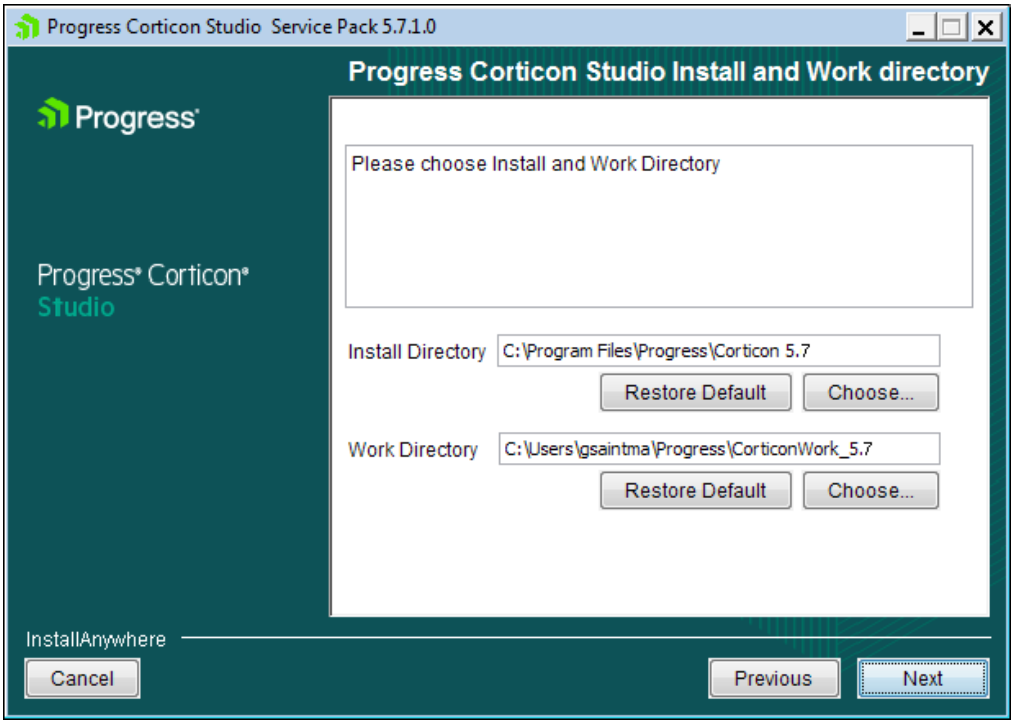
The **License Agreement** panel opens.



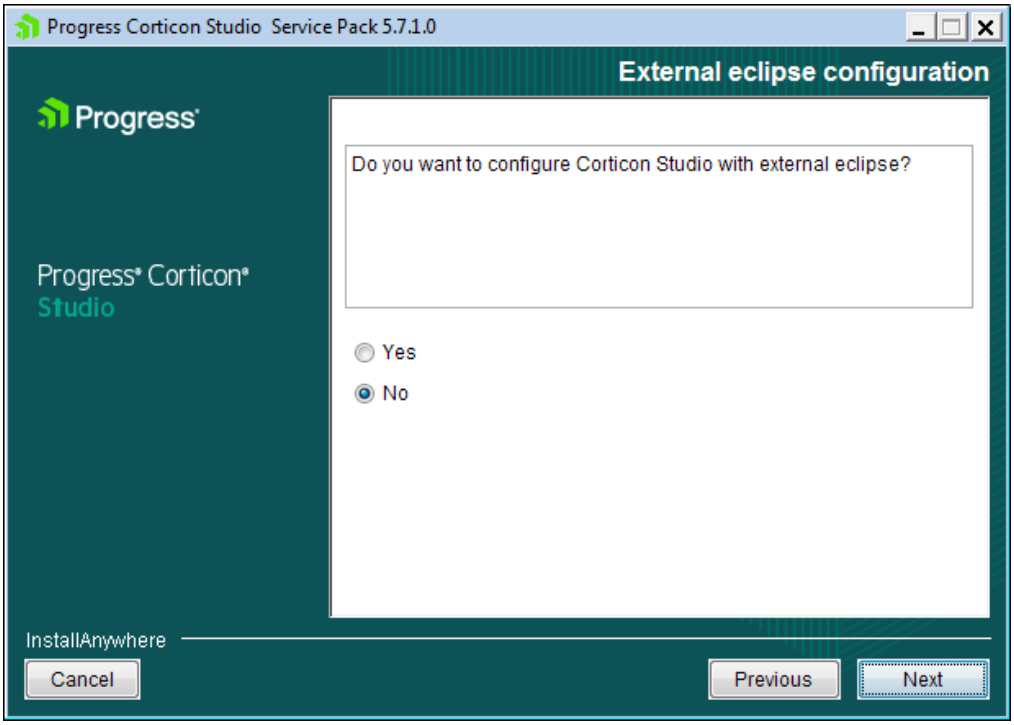
This panel displays the Progress Software End User License Agreement (EULA). Use the scroll bar at the right of the screen to read the agreement content.

4. When you understand and agree to the terms, choose **I accept the terms in the license agreement**, and then click **Next** to continue.

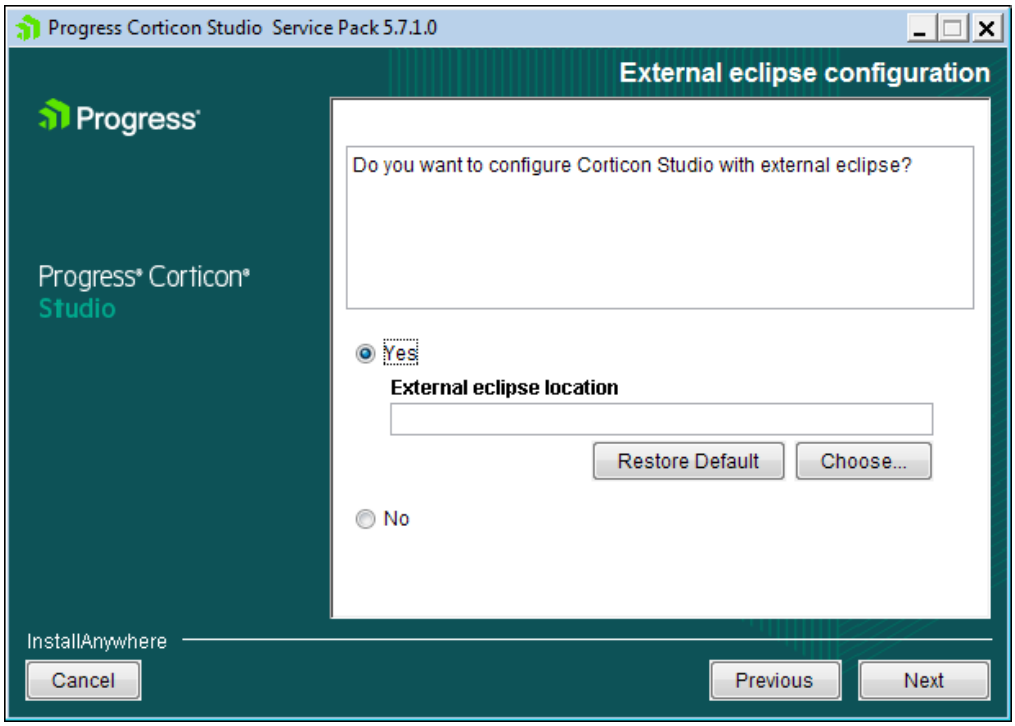
   The **Choose Install Folder** panel opens.



5. Specify the installation location. The default location for the installation directory and the work directory are as shown above. (For the work directory, the default subdirectory under `Users` is the current username.) Either accept the default locations, or specify each preferred (and different) location.
6. Click **Next**.
7. The **External eclipse configuration** panel opens:



- If you select **Yes** on this panel, the entry area for the **External Eclipse location** in which you want to add Corticon Studio (in addition to a standard installation) is presented:

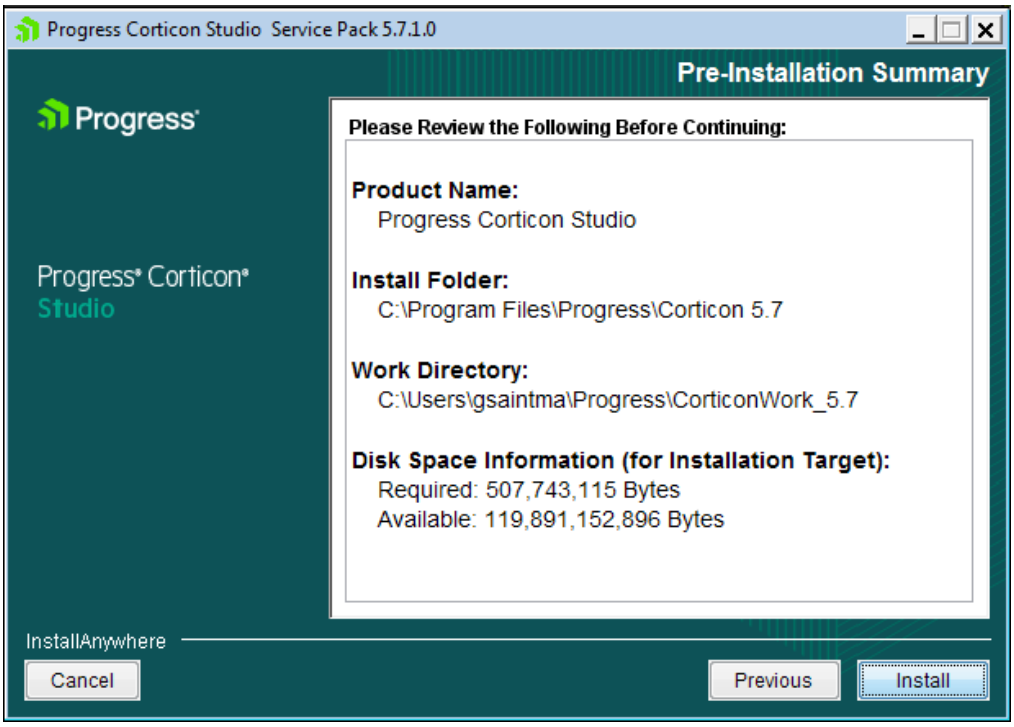


Enter or browse to the location of the existing Eclipse 4.5 64-bit installation.

- If you leave the selection as **No**, a normal installation will proceed.

  When you have decided which path to take, click **Next** to continue.

8. The **Pre-installation Summary** panel opens.



   Confirm that your installation location has adequate disk space for the Corticon Studio components as well as at least 100 MB of workspace.

9. Click **Install** to continue.

   An installation status window opens to display the state of the installation process. When the process has finished, the **Install Complete** panel opens.

10. Click **Done** to quit and close the installer.

The installation or update of Corticon Studio 5.7 is complete.

Performing Silent Installations of Studio

An unattended (silent) install requires that you first run an installation or updater in the installer wizard to capture the selected options, and then use the captured response file on other targets to 'playback' the responses into the installer without any user interaction.

To perform silent installations for Corticon Studio:

1. Run the Studio installer with your preferred locations and options to capture a response file, using the syntax `installer.exe -r file` where `installer` is the preferred Studio installer, and `file` is the response

file you will reuse. For example, `PROGRESS_CORTICON_5.7_STUDIO_WIN_64.exe -r C:\CorticonStudio64_57.responses`

2. On other target machines, access the Studio 5.7 installer executable and the response file.
3. On those machines, run the installer using the syntax *`installer`*`.exe` **`-i silent -f`** *`file`* where *`installer`* is the Studio installer, and *`file`* is your response file. For example, `PROGRESS_CORTICON_5.7_STUDIO_WIN_64.exe -i silent -f C:\CorticonStudio64_57.responses`.

Installing Corticon Studio plugins into an existing Eclipse

These instructions apply when you want to install Corticon functionality into an installed 64-bit Eclipse IDE.

1. A Java Software Development Kit (JDK) is required for Corticon, not just a Java Runtime Environment (JRE). If you do not have one installed locally, download and install a 1.7 or higher 64-bit version from the Oracle Java website http://www.oracle.com/technetwork/java

   Note: For the installation of the Corticon Studio plugins, you can use the JRE that Eclipse is using. In Eclipse, choose **Window > Preferences**, then select **Java > Installed JREs**.

2. Download and perform a standard installation of Corticon Studio into a clean directory on the target machine. This installation will provide the script and the required files for the integration into your target Eclipse location.
3. In a Command Prompt window at the Corticon Studio's `[CORTICON_HOME]/Studio` location, check to see whether `JAVA_HOME` is set. If not, set `JAVA_HOME` to the JDK root. For example: `set JAVA_HOME=c:\jdk1.7u67_64`
4. Confirm that neither the installed Corticon Studio or the target Eclipse are running.
5. In the Command Prompt, run the integration script in the form:

   ```
   integrateCorticon.bat -install  eclipse_target
   ```

   where *eclipse_target* is the root directory of the target Eclipse installation.

   Eclipse installs its required plug-ins.

6. To ensure that Corticon Ruletests can locate `javac` to compile rules, add the path of the JDK to your `PATH` as the default Java to use. For example:

   ```
   set PATH=%JAVA_HOME%\bin;%PATH%
   ```

7. Specify the Corticon work directory, the folder where you want Corticon to write its log and other temporary files. For example:

   ```
   set CORTICON_WORK_DIR=c:\corticon_work_dir
   ```

8. When the script successfully completes, restart the Eclipse session, and then verify the installation by selecting the menu command **Help > About Eclipse**. Click **Installation Details** to confirm that **Progress Corticon Feature** is installed.
9. Open a project, and then run a Ruletest. A successful run indicates that the Java compiler is being accessed correctly.

The `integrateCorticon` script enables other functions:

```
COMMAND SYNTAX AND OTHER OPTIONS
================================
Usage: integrateCorticon [OPTION] [TARGET_ECLIPSE]
Manage installation of Corticon plugins in an Eclipse install
 -install        Install Corticon plugins in TARGET_ECLIPSE
 -uninstall      Uninstall Corticon plugins from TARGET_ECLIPSE
 -update         Update Corticon plugins in TARGET_ECLIPSE
 -updateParams   Update Corticon plugins parameters in TARGET_ECLIPSE
 -help           Display this message
```

Increasing Corticon Studio memory allocation

When working on large Rule Projects, you will get better performance by increasing the amount of memory available to Corticon Studio.

To change Corticon Studio memory allocation after installation, do the following:

1. Edit the command file `eclipse.ini` located at `[CORTICON_HOME]\Studio\eclipse`
2. Change (typically, increase) the `Xmx` value (maximum memory setting). The default `Xmx` setting is 2 gigabytes, specified as `Xmx2g`.

Note: For more about memory sizing, see KnowledgeBase article 46561

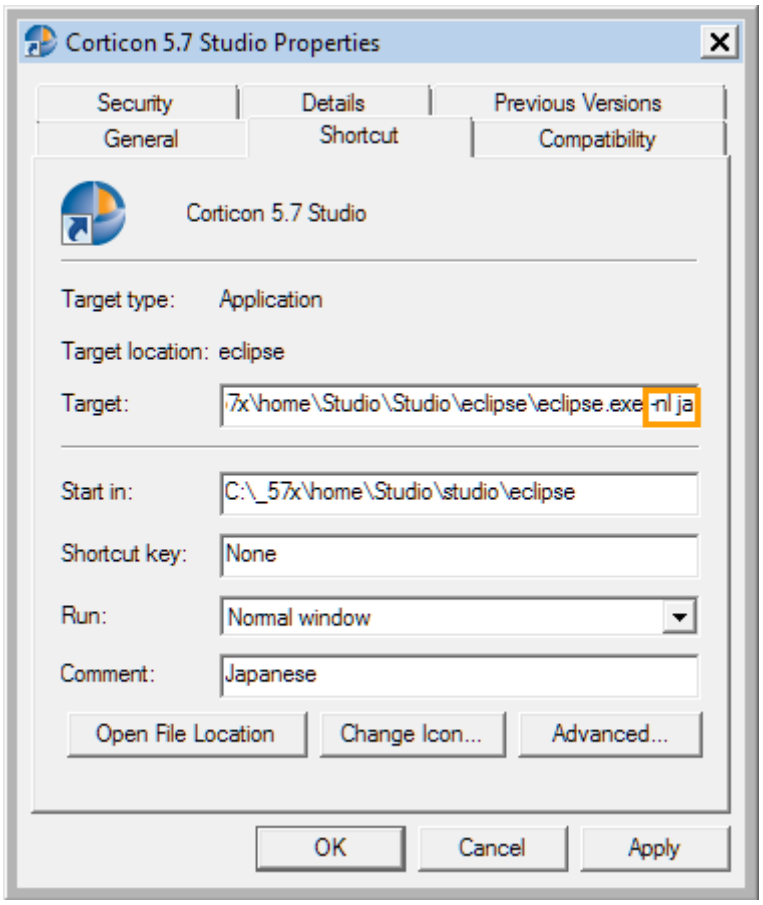
Setting Studio to run in another language

You can specify a preferred language for Corticon Studio. the options are:

- English (`en` - default)
- French (`fr`)
- Japanese (`ja`)
- Portuguese (Brazilian) (`pt_BR`)
- Spanish (`es`)

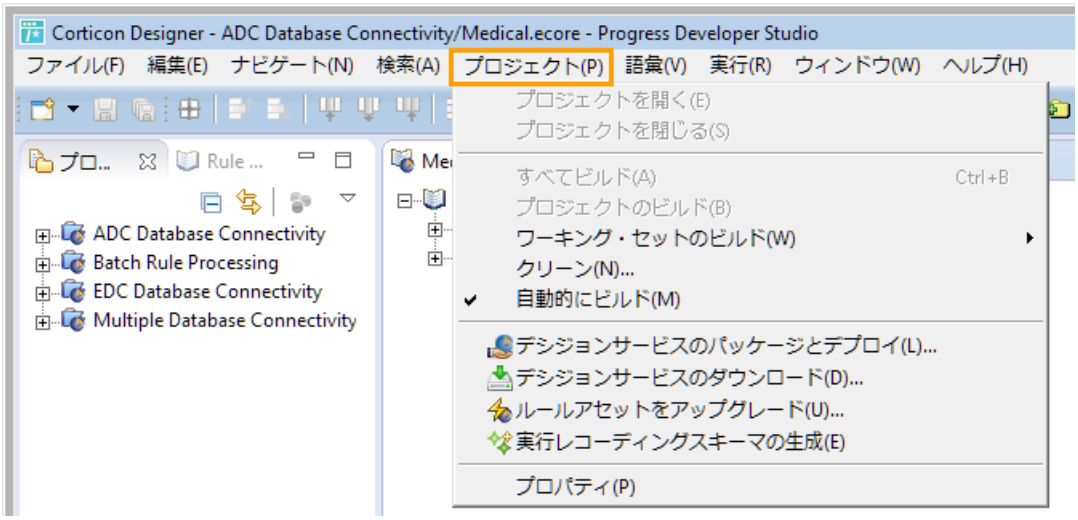
To set Corticon Studio to start in your preferred language:

1. Right-click on the **Start** menu item for **Corticon 5.7 Studio**, and then choose **Properties**.
2. In the properties dialog box, add the language option, `-nl` followed by the language value, as shown in this example setting `ja` for Japanese:



3. Click **Apply**, and then **OK** to set the change.

When you start Corticon Studio its labels are in Japanese, as illustrated:



4

Installing Corticon Servers and Web Console

This section provides information about the installation procedures for the deployment and administration components of Corticon Server as well as the Progress Application Server (PAS) -- a Web application server based on Apache Tomcat -- that is used by the Java Server and the Web Console.

Note: Linux Installation - When you download and run the Linux server installer, you get shell (`.sh`) scripts for start/stop and utility tools that correspond to the batch (`.bat`) scripts in a Windows installation.

There are several techniques for installing Corticon Server components:

- Running the Server and Web Console installer wizard on page 22, the typical use, which enables a complete Corticon Server for Java, Corticon Server for .NET, and Corticon Web Console.
- Performing silent installations of Server components on page 26 that generates a file from an installer wizard run to let you perform silent installations of Server components on other Windows machines.
- Performing command-line Linux installations of Server components on page 27 enables the Linux installer to run from the shell as a command with parameters.
- **Performing a manual installation of Server components:** Corticon Server for Java and Web Console are available in zip archives. Use them to manually install Corticon WAR/EAR files into a supported application server on any supported platform. For details about installing Corticon into specific application servers, see Corticon Server 5.X sample EAR/WAR installation for different Application Servers .

Considerations for Authentication

Confirm that servers that will host Corticon Server installations are enabled for authentication, and that Decision Service administrators have the credentials to deploy to those servers.

When you run the Corticon Server installer, the Progress Application Server (PAS) does not enable authentication by default. To do so, see *"Setting up authentication for secure server access" in the Integration and Deployment Guide.*

For details, see the following topics:

- Running the Server and Web Console installer wizard
- Performing silent installations of Server components
- Performing command-line Linux installations of Server components
- Preparing Corticon .NET Server resources for an IIS server

Running the Server and Web Console installer wizard

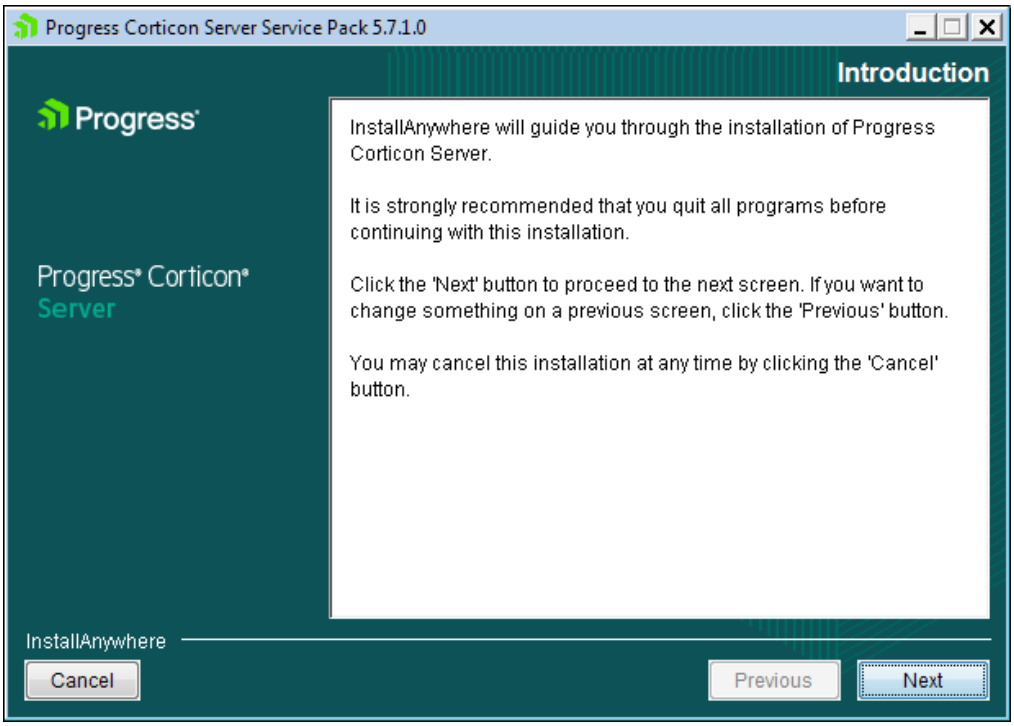
The Server installer will install or update Servers and Web Console to 5.7.

Note: You can install Corticon Servers and the Web Console on a machine that has a previous version installed. Where a previous version is installed, you must manage any port overloads that might result from running both versions. However, an installed version of Corticon Server 5.2 or earlier on the target machine must be uninstalled, then Corticon Server 5.7 installed. Consult with Progress Corticon Support or your Progress representative to consider your migration strategies for existing assets before you take action.

To create or update an installation of Corticon Servers (Java and .NET) and Web Console 5.7:

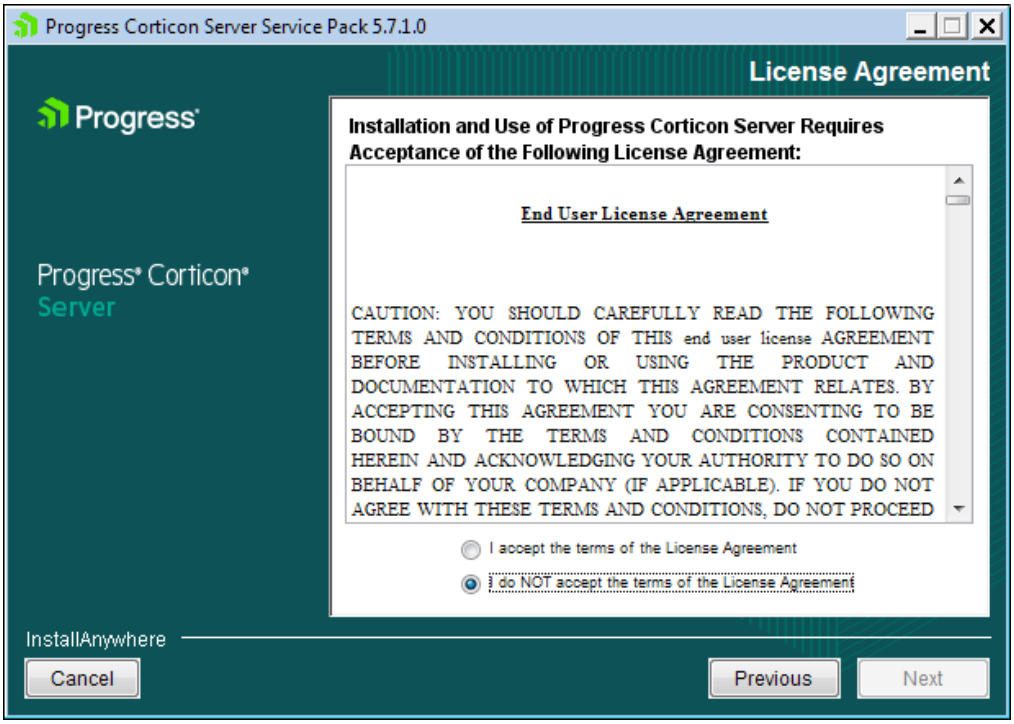
1. On the target machine, access the Corticon 5.7 installers you downloaded.
2. To open the Progress Corticon Server Setup Wizard:
   - For Windows, double click on: `PROGRESS_CORTICON_5.7_SERVER_WIN_64.exe`
   - For Linux, run: `PROGRESS_CORTICON_5.7_SERVER_LNX_64.bin`

   The installer opens in the installer wizard. The first installer panel opens with information about the installer.



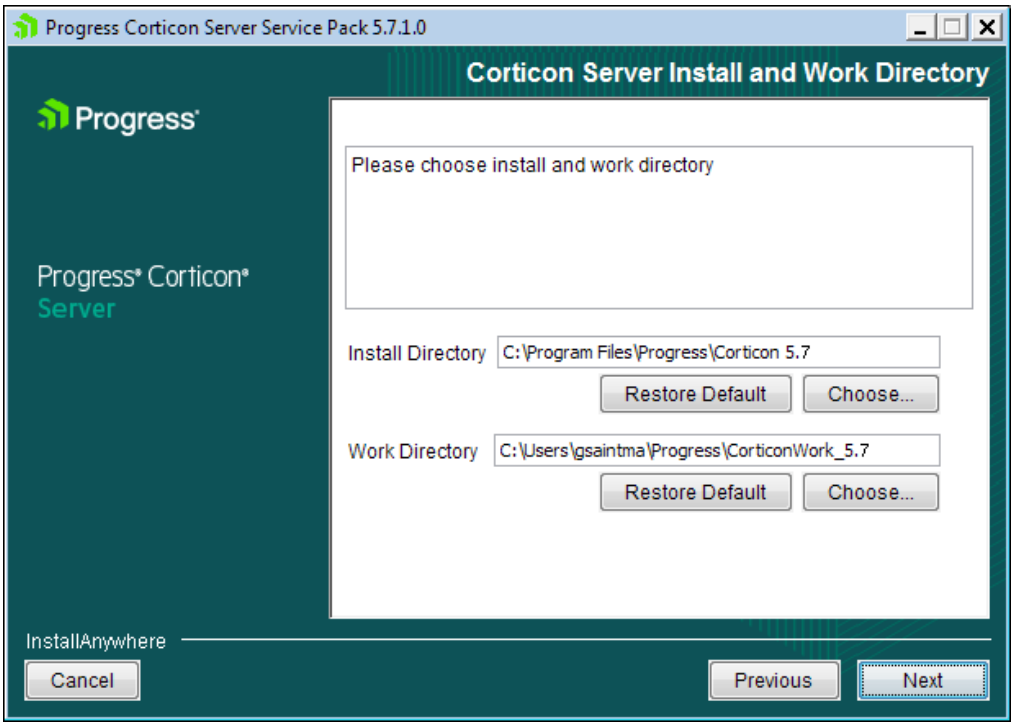
3. Click **Next** to continue.

   The **License Agreement** panel opens.



4. After you have read, understood, and agreed to the terms of the End User License Agreement, choose **I accept the terms of the license agreement**, and then click **Next.**

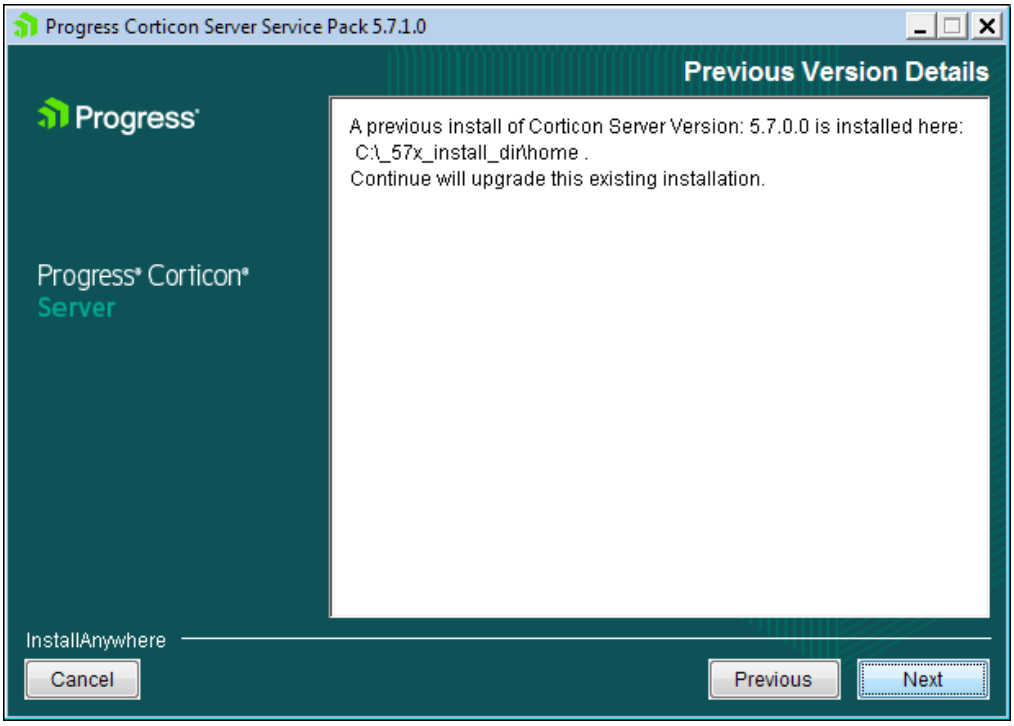
   The **Choose Install Folder** panel opens.



5. The default installation directories are shown. To specify preferred directories on each line, either enter the explicit path, or click **Choose** to browse to each preferred directory.

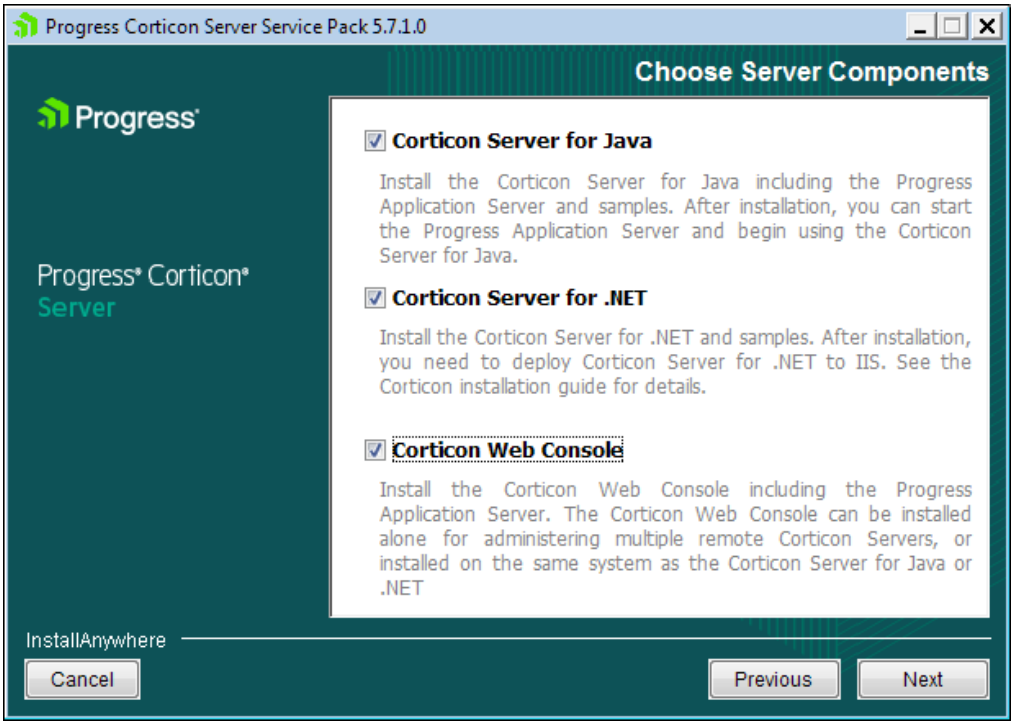
Note: For Linux installations, the work directory path must not contain spaces.

6. If you see the upgrade panel instead, Corticon Server components are already installed. You can add previously unselected components but you cannot change the install location or uninstall existing components.



7. Click **Next**.

The **Choose Server Components** panel opens.

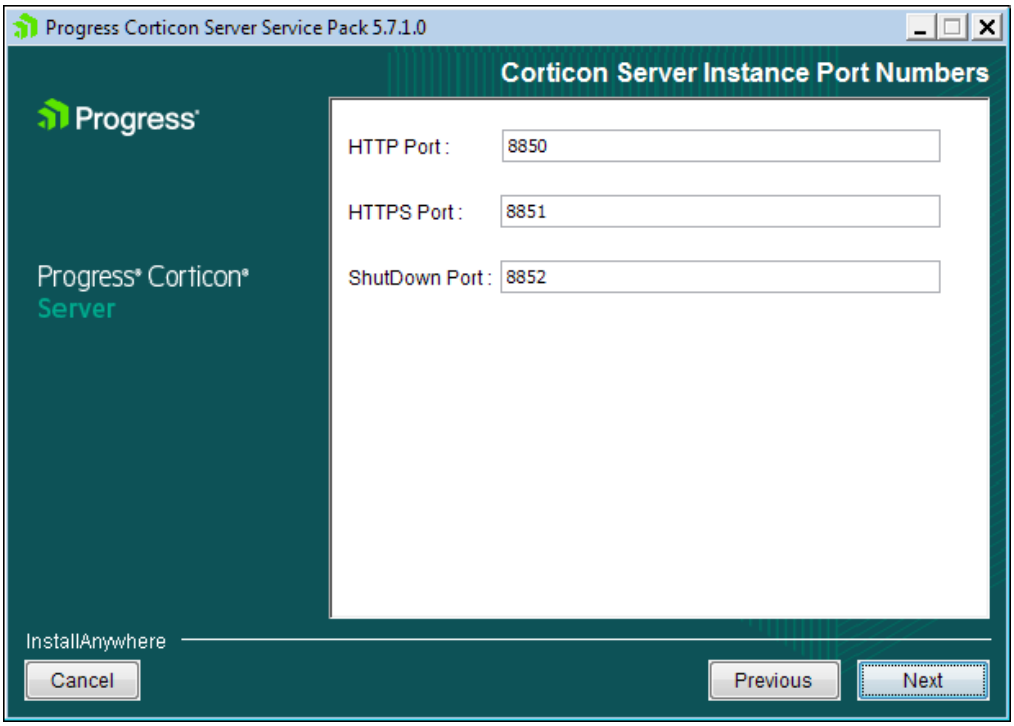


8. Choose the one or more components you want to install at this time. Any components already installed are chosen and grayed out. If you choose Corticon Server for .NETas one of the components, see the topic Preparing Corticon .NET Server resources for an IIS server on page 28 for further instructions.

Note: The Linux installer does not enable a Corticon Server for .NET installation.

Click **Next**.

9. If you selected the Java Server or Web Console, the **Corticon Port Numbers** panel opens.



10. If any of the preferred ports conflict with existing applications, you can change them at this time to an integer value from `1024` to `49151`. Be aware that the documentation references these ports as though the default values, as shown, were accepted. Consult with your system administrator to identify alternate ports you might use, or to reset the ports on the conflicting applications.

    Enter your preferred port numbers, and then click **Next**. The **Pre-Installation Summary** page opens.

11. Verify your selections in the **Pre-Installation Summary** panel. Nothing has happened yet so you can click **Previous** to go back to a panel to make changes, or click **Cancel** to quit this installation procedure.
12. Click **Install** to continue. The installation status window opens. When done, the **Install Complete** panel opens.
13. Click **Done** to complete the Corticon Server / Web Console installation and close the installer.

The installation and update of Corticon Servers and Web Console 5.7 is complete.

Note: Using an LDAP store for Web Console authentication - You can set up Corticon Web Console to authenticate users using an LDAP server. See the topic *"Using LDAP for Web Console authentication" in the Web Console Guide.*

Performing silent installations of Server components

An unattended (silent) install requires that you first run an installation in the installer wizard (Windows or Linux) to capture the selected components and options, and then use the captured response file on targets on the same platform to 'playback' the responses into the installer without any user interaction.

Silent installations or updates for Corticon Server Components on Windows:

1. Run the Corticon Server for Windows installer with your preferred locations and options to capture a response file, using the syntax *installer*.exe **-r** *file* where *installer* is the preferred Server installer, and *file* is the response file you will reuse. For example:

   ```
   PROGRESS_CORTICON_5.7_SERVER_WIN_64.exe -r C:\CorticonServer_57_WIN.responses
   ```

2. On other target Windows machines, access the Server 5.7 installer executable and the response file.
3. Run the installer using the syntax *installer*.exe **-i silent -f** *file* where *installer* is the Server installer, and *file* is your response file. For example:

   ```
   PROGRESS_CORTICON_5.7_SERVER_WIN_64.exe -i silent -f
   C:\CorticonServer_57_WIN.responses
   ```

Silent installations or updates for Corticon Server Components on Linux:

1. Run the Corticon Server for Linux installer with your preferred locations and options to capture a response file, using the syntax *installer*.bin **-r** *file* where *installer* is the preferred Server installer, and *file* is the response file you will reuse. For example:

   ```
   PROGRESS_CORTICON_5.7_SERVER_LNX_64.bin -r
   /usr/corticon/CorticonServer_57_LNX.responses
   ```

2. On other target Linux machines, access the Server 5.7 installer binary and the response file.
3. Run the installer using the syntax *installer*.bin **-i silent -f** *file* where *installer* is the Server installer, and *file* is your response file. For example:

   ```
   PROGRESS_CORTICON_5.7_SERVER_LNX_64.bin -i silent -f
   /usr/corticon/CorticonServer_57_LNX.responses
   ```

Performing command-line Linux installations of Server components

A command-line install runs a Linux installation in a command shell as a text command with parameters.

To perform command-line installations for Corticon Server components:

1. On a supported 64-bit Linux platform, access the downloaded Linux installer binary file, PROGRESS_CORTICON_5.7_SERVER_LNX_64.bin
2. In a shell, run the binary with the console option. For example:

   ```
   # ./PROGRESS_CORTICON_5.7_SERVER_LNX_64.bin -i console
   ```

3. Follow the prompts to complete the installation via the command-line.

Note: For Linux installations, the work directory path must not contain spaces.

Preparing Corticon .NET Server resources for an IIS server

The runtime server for Corticon Server for .NET is Microsoft Internet Information Services (IIS), a distinct setup into which you install and update with the latest Corticon Server for .NET resources.

- Obtain an appropriate Corticon license for Corticon Server.
- Confirm that your target machine meets the system requirements. See System requirements on page 8 for more information.
- See the Progress Software web page Progress Corticon 5.7 - Supported Platforms Matrix for information on supported .NET Framework and IIS.

See the instructions for *"Setting up Corticon Server for .NET on IIS" in the "Deploying Web Services on .NET" guide.*

5

Procedures for upgrading Corticon installations

Stepping through tasks that optimize upgrades of Corticon Studios and Servers ensures that your files and assets are synchronized with the updated product. These tasks are a checklist of good practices.

If your upgrade was a minimal step forward, such as a patch (such as 5.6.0.11 > 5.6.0.12), you should read the patch notes to see if there are tasks to consider. For a Service Pack (such as 5.7.0 > 5.7.1), it is more likely that there are changes in the product that you should handle, even though they might not present problems. For a minor release -- especially a big step (such as 5.5.2 > 5.7.1) -- every one of these tasks should be reviewed, considered, and performed.

Note: Do **not** copy the `.war` or `.ear` files from an older version's installation to a new one.

In the order of action:

ON STUDIO MACHINES

- Update Studio installations
- Update the Studio's brms.properties
- Update eclipse.ini and Java
- Update the Studio license file
- Upgrade assets
- Update desktop shortcut
- Repackage Decision Services

ON SERVER MACHINES

- Undeploy the old Decision Services
- Update Corticon Server and Web Console software
- Update the Server license files
- Update the Server's brms.properties
- Clear browser caches that use the Web Console
- Update IIS servers and set clienttype to IIS
- Deploy regenerated Decision Services
- Stop load balancers and start the new server
- Setting PAS on Windows to run as a Windows Service

ON STUDIO MACHINES

Install Studios

See Installing Corticon Studio on page 13

Update the Studio's brms.properties

Compare the `brms.properties` files that are currently in use. Any property adjustments you made in the past, if still valid, should be copied into the newer installation. While a minor release installs into a separate location, a service pack overlays an existing installation and does not touch an existing `brms.properties` .

Update eclipse.ini and Java

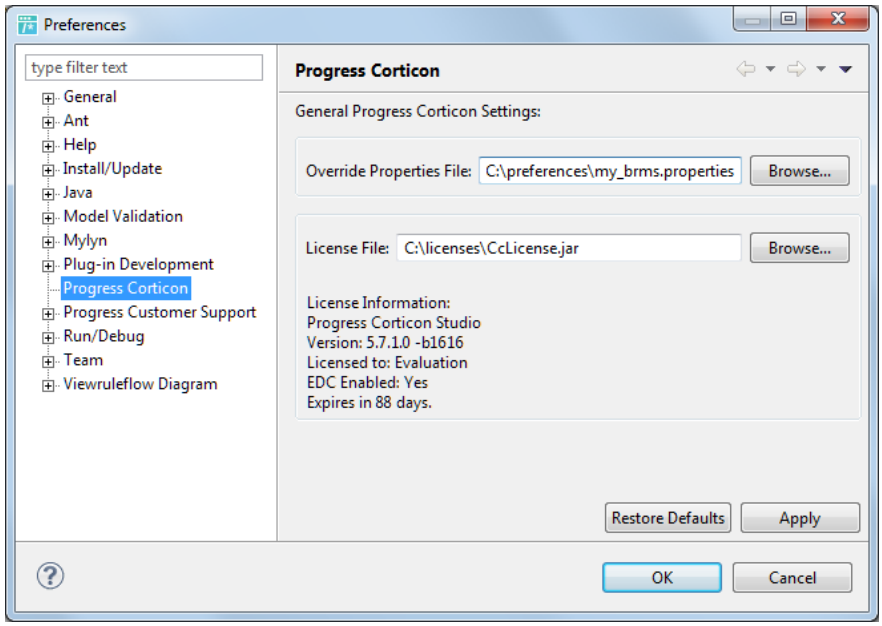
Some Studio installations benefit from tweaking the `eclipse.ini`, often for Studio memory settings. If you are pointing to your preferred Java, it might not be optimal.

Update the Studio license file

A major release will likely require a new license file while minor releases typically do not. When you are provided a license for Corticon Studioand Server, you receive a JAR file, `CcLicense.jar`. Save the file on the target machine or at a location that is network-accessible to the installation. In this example, the license file that both Studio and Server will use is placed at `C:\licenses`.

To update a Studio license:

1. Select the menu command **Window > Preferences**.
2. Expand the **Progress Corticon** group. In the **License File** entry area, enter or browse to the location of the license JAR:



Click **Apply**, and then click **OK**.

Upgrade assets

In Studio, be sure to upgrade all project assets. While you could do this file by file or project by project, it is a good idea to advance all the assets you might work with in the current release. It is a good idea to run any Ruletest or unit tests to see that the behaviors are as expected.

Update desktop shortcut

Make changes to your desktop shortcut if you want your new Studio version to run in a different language.

Repackage Decision Services

Use any of the several techniques in Studio to package projects as Decision Services, and then stage them for deployment on the new server installations.

Other considerations

- If you are advancing from 5.5 to 5.7.1, and using EDC Datasource metadata, regenerate the metadata.
- If you are advancing to 5.7.1, Advanced Data Connectors changed dramatically since its introduction in 5.6.1, the way its used in 5.7.0, and the Datasource configuration file in 5.7.1 to support an independent query database.

ON SERVER MACHINES

Undeploy old Decision Services

Undeploy every EDS on the target servers.

Install new Corticon Server and Web Console software

If you are using load balancers to carry the load during upgrade, take one of its peers offline, and stop it. Run the installers, and then start the new Server.

Note: Other application servers - The `.ear` and `.war` files can be downloaded in the `PROGRESS_CORTICON_5.7_SERVER.zip` package. The unpackaged files are typically installed in the Corticon directory `[CORTICON_HOME]\Server\Containers\{EAR/WAR}`. Refer to the Progress Software web page Progress Corticon 5.7 - Supported Platforms Matrix to review the currently supported UNIX/Linux platforms and brands of Application Servers. Also see the Corticon KnowledgeBase entry Corticon Server 5.X sample EAR/WAR installation for different Application Servers for detailed instructions on configuring Apache Tomcat, JBoss, WebSphere, WebLogic on all supported platforms.

Update Server licenses

The Server requires you to copy the `CcLiense.jar` file, and then paste it to replace the existing file, as follows:

- **Java server license**:
  - `[CORTICON_HOME]\Server\lib\`The license used for Server tasks and operations.
  - `[CORTICON_WORK_DIR]\Server\pas\server\webapps\axis\WEB-INF\lib`The license deployed to the runtime server. If you are managing a default Java server (PAS) from the Web Console, you can perform this task through its *"Editing Servers" in the Web Console Guide.*
  - When your installation is from the `.ear` and `.war` files for deployment onto other supported platforms and application servers, place the license file adjacent to the Corticon JARs.
- **.NET server license :**
  - `[CORTICON_HOME]\Server .NET\samples\lib\`The license used by the samples.
  - `[CORTICON_HOME]\Server .NET\webservice\lib\`The license propagated to the IIS location by the install utility..
  - The IIS location, typically: `C:\inetpub\wwwroot\axis\lib\`The license at the IIS location. If you are managing a .NET server from the Web Console, you can perform this task through its *"Editing Servers" in the Web Console Guide.*

Update the Server's brms.properties

As with Studio, compare and update the `brms.properties` files on Java and .NET servers with consideration that many properties are effective only on servers.

Clear browser caches that use the Web Console

For administrators that use the Web Console, have them flush their browser caches.

For .NET servers:

- **Install to the IIS** - Run `install.bat` to refresh the IIS server's libraries and samples. Answer **Y** to all the overwrite choices. Then restart the IIS server.
- **Set the Client Type** - Change the setting in the `brms.properties` file that enables the Studio remote tests and server utilities:

  ```
  com.corticon.studio.client.soap.clienttype=IIS
  ```

  For more information, see *"Setting the Client Type" in the .NET Guide.*

- Copy the `brms.properties` file from the Corticon server root, paste it into the `axis` folder at the IIS location, and thereafter apply updates to it there.

For more information, see the *.NET Guide.*

Deploy the fresh Decision Services

Deploy the newly created Decision Services to the new server.

Stop load balancers and start the new server

Use Web Console (or other techniques) to deploy the upgraded EDS files and license to the new Server. Bring the other load balancers down, and then expose the upgraded server to carry the load. Uninstall old Servers, and then upgrade and provision to be peers.

Setting PAS on Windows to run as a Windows Service

You can run Corticon Server under Progress App Server as a Windows Service by executing:

```
[SERVER_WORK_DIR]\pas\server\bin>tcman service Corticon register
```

Note: Specifying the Corticon Server file locations - At startup, the Windows Service creates `CcServerSandbox` and logs at `[HOME]\pas\Server\bin`. That might not be what you want. To position those files at their standard location (or at any preferred location):

1. Stop the running Windows Service.
2. Launch the Corticon Command Prompt.
3. Set`JAVA_HOME`.
4. Enter:

```
tomcat8 //US/Corticon ++JvmOptions="-DCORTICON_SETTING=SER"
tomcat8 //US/Corticon
++JvmOptions="-DCORTICON_WORK_DIR=C://Users//xxxxx//Progress//CorticonWork"
```

5. Restart the service.

An alternate solution is to add lines to the server's `brms.properties` file:

```
com.corticon.ccserver.sandboxDir=C:/Users/xxxxx/Progress/CorticonWork/SER/CcServerSandbox
logpath=C:/Users/xxxxx/Progress/CorticonWork/logs
```

For the logpath, you must use forward slashes as the separator.

6

Uninstalling Corticon Products

Uninstalling Corticon Studio or Corticon Server results in removing a complete major.minor version of those products, including any service packs or hotfixes applied. It is not possible then to uninstall just a service pack or hotfix.

Uninstalling Corticon Studio

To remove a version of Corticon Studio, do the following:

1. Close Corticon Studio.
2. Choose the **Start** menu **Control Panel** function **Programs and Features**, and then double-click on **Progress Corticon Studio 5.7.x** to launch its uninstaller.

> **Note:** You could initiate the same task directly by navigating to `[CORTICON_HOME]\Uninstall_Progress Corticon Studio 5.7`, and then running `Uninstall Progress Corticon Studio 5.7.exe`.

The installed files in the Studio's `[CORTICON_HOME]` are removed. Files you created (including the complete workspace) are NOT removed or replaced during this process.

If the Uninstaller program is unable to fully remove components (usually because they are open), it will display messages, and might require a reboot to complete the process.

Uninstalling Corticon Server

The Corticon Server components -- Corticon Server for Java, Corticon Server for .NET, and the Corticon Web Console -- use common installation directories. As such, you cannot choose to uninstall just selected components. Uninstallation will remove all installed server components.

To uninstall Corticon Server on Windows:

1. Stop Corticon Server.
2. Backup any files you want to retain.
3. Choose the **Start** menu **Control Panel** function **Programs and Features**, and then double-click on **Progress Corticon Server 5.7.x** to launch its uninstaller.

Note: You could initiate the same task directly by navigating to `[CORTICON_HOME]\Uninstall_Progress Corticon Studio 5.7`, and then running `Uninstall Progress Corticon Server 5.7.exe`.

To uninstall Corticon Server on Linux:

1. Stop Corticon Server.
2. Backup any files you want to retain.
3. In a command shell, navigate to `[CORTICON_HOME]\Uninstall_Progress Corticon Studio 5.7`, and then run `Uninstall Progress Corticon Server 5.7.bin`.

The installed files in the Server's `[CORTICON_HOME]` are removed. Note that files you created are NOT removed or replaced during this process. No server files in the `[CORTICON_WORK_DIR]` are removed.

A

Corticon 5.7.2 Online Tutorials and Documentation

TUTORIALS: Learn about Corticon from online lessons at the Corticon Learning Center.

DOCUMENTATION: About this release	
What's New in Corticon Online Help PDF	Describes the enhancements and changes to the product since its last point release.
Corticon Installation Guide Online Help PDF	Step-by-step procedures for installing Corticon Studio and Servers in this release on Windows and Linux platforms.

DEVELOPMENT DOCUMENTATION: Define and Model Business Rules	
Rule Modeling Guide Online Help PDF	Introduces how business rules are modeled in Corticon Studio including the creation of Vocabularies, Rulesheets, Ruleflows, and Ruletests. This is the starting point for new rule modelers.
Quick Reference Guide Online Help PDF	Reference guide to the Corticon Studio user interface, including descriptions of all menu options, buttons, and actions.
Rule Language Guide Online Help PDF	Reference information for all operators available in the Corticon Studio Vocabulary.

Extensions Guide Online Help PDF	Detailed technical information about the Corticon extension framework for extended operators and service callouts.
Javadoc for Extensions API Javadoc	Complete Java API reference for Corticon Extensions.

DEPLOYMENT DOCUMENTATION: Run Decision Services on Servers	
Integration and Deployment Guide Online Help PDF	Provides details on deploying and managing Corticon Decision Services. Start here to learn about the options for deploying Corticon, the best practices for managing your deployment, and the APIs for integrating Corticon with clients executing rules.
Data Integration Guide Online Help PDF	Provides details on how to integrate Corticon with external data sources and how to use Corticon for batch rule processing. Includes details on Corticon EDC and ADC features for accessing data from Decision Services.
Web Console Guide Online Help PDF	Presents the Corticon Web Console which can be used to manage your Corticon deployment. This GUI interface simplifies the management and monitoring of Corticon servers and Decision Services.
Deploying Web Services with Java Online Help PDF	Provides details on deploying Corticon as a REST or SOAP web service on Java application servers.
Deploying Web Services with .NET Online Help PDF	Provides details on deploying Corticon as a REST or SOAP web service on Microsoft IIS.
Javadoc for Corticon Server API Javadoc	Complete Java API reference for Corticon Server.