Charisma Update
Installation Instructions

(Company Confidential)

Important Information
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BML
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Contents

CHARISMA INSTALLCHAR UPDATE INSTRUCTIONS ..............................3

Introduction ..................................................................................5
Prerequisite ...................................................................................5
CHARISMA Update Installation ........................................................6
Devices .........................................................................................7
Running installchar .......................................................................7
Load New Install ..........................................................................8
Other Points ................................................................................28
Any Difficulties? ..........................................................................28
CHARISMA installchar Update Instructions

Note: Always ensure that prior to upgrading your system, arrangements have been made for your BML Support Team to be available for the duration of the upgrade. In the unlikely event that a difficulty should arise, and Support Staff are not available, it may take some time to recover your system, rendering it inoperable during that period.

Note: If UniVision is in use, and there are file changes between the version of CHARISMA currently in use and the version to which the system is being upgraded, a second tape containing the changes to UniVision will also be required. If you do not possess a UniVision update tape for the version of CHARISMA to which you are upgrading, call the O/S Support Group on 01908 249720, who will arrange to provide the UniVision update. Do not proceed with the CHARISMA upgrade until you have the UniVision update ready for installation.

Note: If you are unsure of any Phase during the installation, please contact your BML Support Team for assistance.

Note: If during the installation any errors occur, these must be reported to your BML Support Team.
Introduction

The *installchar* script is used to make updates of CHARISMA automatically. It also provides an audit log of any action taken, this report is then faxed back to your BML Support Team.

Prerequisite

We advise that the conversions of data will run more efficiently if the data to be converted has previously been reorganised. The reorganisation can take place over a period of days leading up to the actual conversion. It is also advisable to purge these files where possible, prior to reorganising them. Your BML Support Team can inform you which conversions, if any, will run after your update.

Your system must have sufficient free disk space available to convert the largest file on the system. This conversion copies the file as a backup onto the existing system and then copies it back again in the new format, therefore there must be enough space for the largest file to be copied. The Install will check this information for you, but your BML Support Team can also check this manually prior to the update.

On receipt of your CHARISMA software update, please contact your BML Support Team. This is to ensure that any system processing requirements are performed prior to the installation.
CHARISMA Update Installation

When the new CHARISMA update tape / CD has been received, you will require 3 other tapes to proceed with the installation:

1. Blank tape for a SAVEFILES.
2. Blank tape for a Current CHARISMA program backup.
3. Blank tape for a New CHARISMA program backup (If the CHARISMA Update has been received on CD, this is not required).

The update tape / CD has 2 tar format archives on it. The first contains the following four files:

a) installchar (An updated version of the installchar script).
b) Update_Info (Information about the update).
c) Conversions (A list of all the file conversions that should have been run up to and including this version).
d) Install(*) (The script required to load on the new CHARISMA files).

The second tar contains CHARISMA and other files needed for the running of CHARISMA.
Devices

If the update has not been supplied on CD, then the `installchar` script relies upon knowing the actual UNIX tape device name to work correctly. This name differs between systems, but the `installchar` script will attempt to determine the correct default name. This will usually be the current data backup device. The following are the possibilities for different computer systems:

<table>
<thead>
<tr>
<th>Operating System (Machine)</th>
<th>Default device name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCO UNIX (e.g. BML box)</td>
<td>/dev/rct0</td>
</tr>
<tr>
<td>AIX (e.g. Powerstack)</td>
<td>/dev/rmt0</td>
</tr>
<tr>
<td>NCR SVR4</td>
<td>/dev/rmt/ctape1</td>
</tr>
</tbody>
</table>

If the default device name cannot be determined, a list will be provided from which the user selects a drive. From these device names, `installchar` will attempt to determine the ‘no rewind’ device. This is needed so the update can access the second tar archive on the tape. If this name cannot be determined by `installchar` the update cannot run.

If `installchar` has been run once before, the tape device name used is stored and used the next time an update is loaded.

Running installchar

To load the latest version of installchar onto the computer system from the update received, enter the following at the command line (-tty prompt):

**For CD:**
```
cd
mountCD
cp /cdrom/installchar .  (after .../installchar there is a space & full stop)
```

**For Tape:**
```
tar xvf "Tape Device" installchar
```

The running of `installchar` operates in separate phases:

To start the installation enter the following at the command line (tty prompt:)
```
installchar
```
Load New Install

\textit{installchar} begins by extracting from the update tape / CD, the latest version of ‘Install’.

During the upgrade a log is created of the various phases with information relevant to BML should a problem occur. This log is faxed to BML when the script terminates, either normally or abnormally. To ensure that if a difficulty arises it can be quickly resolved, the upgrade requires the name of the person who is performing this function as a point of reference. The upgrade requests this information by asking:

\begin{quote}
What is your name:
\end{quote}

Enter your name at this prompt.

The upgrade prompts for the entering of the tape/cd device being used. The default device name is displayed for reference.

\begin{quote}
Please enter the tape/cd archive device, for cd-rom, just enter CD

The default is the one used by your savefiles –

Return for the default – ( listed if found )
\end{quote}

Entry of ‘Q’ at this point will exit the upgrade.

An invalid tape device name will stop the upgrade with the message:

\begin{quote}
not a Tape Drive!
\end{quote}

When the tape device is successfully read from, the upgrade continues, displaying the message:

\begin{quote}
Checking Tape........
\end{quote}

\begin{quote}
Extracting Install(*)
\end{quote}
If the latest version of Install is successfully extracted, the upgrade continues, displaying the message:

Extracted Install(*) successfully

installchar will then automatically run the Install script extracted from the tape / CD.
Phase 1

The Install script will display the terms and conditions related to the update about to take place:

Charisma update installation

WARNING: The BML CHARISMA Software Product is protected by copyright law and international treaties.

You may install BML CHARISMA on a single computer. Additional user rights are detailed in the BML Program Products Licence included with the software product.

Please read the BML Program Products Licence. It contains all of the terms and conditions that pertain to the Charisma software product. By choosing to continue, you indicate that you accept these terms and conditions.

Please type C to continue, or Q to Quit

If you agree with the terms and conditions enter ‘C’ to continue with the update.

If you disagree with the terms and conditions you can exit from the upgrade by entering ‘Q’. The upgrade will display the message ‘Aborted.’ and return to the UNIX prompt.

If continuing with the update, the following information message is displayed:

During this installation you will be prompted for various tapes and/or CD-ROM.

You will need to have the following ready:

1. Charisma update tape/CD-ROM (containing Install and Charisma programs)
2. Savefiles tape (for storing Charisma datafiles backup)
3. Program backup tape (for storing Old Charisma version backup)
4. 2nd Program backup tape (for storing New Charisma version backup)

NOTE: Please leave tapes in the drive until prompted to remove.
Loading updated install script and info.

x Install(*), 126006 bytes, 247 media blocks.
x Update_Info, 515 bytes, 2 media blocks.
x Conversions, 4023 bytes, 8 media blocks.

The Install script will display all the information relevant to the update about to take place:

Machine and O/S details

Source machine : {source machine}
Source user : {source user}
Source directory : {source directory}
Version : {new version}
Date : {new date}
Copy type : {copy type}
Tape format : {tape format}
Size : {new size}
Cobol : {new cobol}
Iq data dict : {iq data}
Machine and O/S : {machine}
Old Charisma : {old size} Blocks
New Charisma : {new size} Blocks
Space needed : {needed} Blocks
Free space : {freespace} Blocks
Current version : {current version}
COBOL version : {cobol version}
If the versions of COBOL on the tape/CD and on the computer system are different the following message is displayed:

**COBOL version on Update is not the same as the version currently running on this machine, is this ok:**

This message is informational only and an entry of ‘Y’ will ignore it and Install will continue.

If ‘N’ is entered Install stops after displaying the following message:

**A Check was made on version of COBOL run time you are currently running, and this was found to be different to the one needed for this update. Call BML support**

If the version of CHARISMA on the computer system and the version on the update tape/CD are the same, the following message will be displayed:

**The version of Charisma on the tape/CD is the same as the version currently running on this machine, is this ok:**

This message is informational only and an entry of ‘Y’ will ignore it and Install will continue.

If ‘N’ is entered Install stops after displaying the following message:

**A Check was made on the version of Charisma you are currently running and was found to be the same version as the update tape/CD. If you are expecting to update versions, for example, if you are currently on v8.2.26 and are expecting v9.1.xx, this is incorrect. If, however, you are just expecting an upgrade of your current version, re run Install and next time answer yes to the "Is this ok" question when this error appears.**

If these are not displayed, the following will appear:

**Press Return**

The system will pause so the details can be read, then press RETURN to continue.
Phase 2

The Install script must have sole use of the system. To ensure that this is the case a check is made to see if any CHARISMA users are logged on or if there are any background processes running (such as reports or a scheduler).

If any users are logged on the following message appears:

There are processes currently running that appear to be Charisma processes. Please ensure everyone is logged off and all background tasks are either completed or killed (this includes the scheduler, which will be killed anyway if you continue)

Do you want to continue y/n:

To manually stop users, enter ‘N’ to this question, to automatically ‘kill’ the process and continue, enter ‘Y’. If ‘Y’ is entered and the update cannot automatically ‘kill’ any processes necessary then one of the following two messages will appear. In these cases it is advised that you call your BML Support Team for assistance.

The installation can’t take place if there are any COBOL processes running. Ensure everybody is logged off, all background reports are killed and the scheduler is killed. Rerun Install. If problems still occur call BML support.

The installation can’t take place if the scheduler is running. This was found to be the case and Install attempted to kill them, but failed. Call BML support.
Phase 3

When the Install has successfully ascertained that no other processes are running, a check is performed to see if any file conversions are required and if the amount of disk space available is adequate.

Checking if conversions need to be run

If there is anything to convert, each file is reported as a list on the screen. A message line appears with the relevant details:

Need to run {program name} to convert {file to be converted}

When the complete list of files has been displayed enter RETURN to continue. A check is made to ensure that the largest file for conversion has enough disk space available. While the files are being checked a series of informational messages appear:

Check for largest datafile:
Looking for files
Now getting sizes

If there is not enough disk space available, the following message is displayed:

Largest file found was {filename} at {number} bytes
This equates to {number} blocks. You have {number} blocks of free space in the SF directory, this means that there might not be enough space to run a Charisma file conversion. Before proceeding with this conversion, please clear some space.

Contact BML Support for assistance.

If there is enough disk space available, the following message is displayed:

Largest file found was {filename} at {number} bytes
This equates to {number} blocks. You have {number} blocks of free space in the SF directory, this means that a Charisma file conversion should run with no problems.
If no file conversions are required, Install displays the following message instead of the previous messages:

```
No conversions need to be run
```

Enter RETURN after any of these messages.

A check is made to ensure that the space needed for the update is available on the computer system. If there is not enough disk space available then Install stops after displaying the following:

```
WARNING: You don’t appear to have enough space

During an installation, your system must have enough room for the new version of Charisma to be on the machine at the same time as your current version. Install detected this was not the case. If you are unsure of how you can make space for this installation to continue, call BML support.
```
Phase 4

During the previous phase of Install, other users may have managed to log on. Therefore, prior to locking the system to other users, the system is rechecked for users logged on.

If any users are logged on the following message appears:

```
There are processes currently running that appear to be Charisma processes. Please ensure everyone is logged off and all background tasks are either completed or killed (this includes the scheduler, which will be killed anyway if you continue)

Do you want to continue y/n:
```

To manually stop users, enter ‘N’ to this question, to automatically ‘kill’ the process and continue, enter ‘Y’. If ‘Y’ is entered and the update cannot automatically ‘kill’ any processes necessary, one of these two messages will appear. In these cases it is advised that you call your BML Support Team for assistance.

```
The installation can’t take place if there are any COBOL processes running. Ensure everybody is logged off, all background reports are killed and the scheduler is killed. Re-run Install. If problems still occur call BML support.

The installation can’t take place if the scheduler is running. This was found to be the case and installchar attempted to kill them, but failed. Call BML support.
```

To prevent any further logins during the installation, Install will now disable the CHARISMA system.
Phase 5

At this point there is the opportunity, should you have overlooked it, to print and update all invoices and credits. This procedure should have been run prior to starting the installchar. The following message appears:

Do you want to print and update Invoices and Credits now:  

Enter ‘Y’ if this is what you want to do, enter ‘N’ if it is not.

If ‘Y’ is entered Install causes CHARISMA to display the following message:

Install will now exit and go into Charisma then continue afterwards

Press RETURN

Whether the updates are run or not, Install continues from the same point.
Phase 6

Prior to any upgrade, it is imperative that you make a backup copy of your data as this will be used to restore from, should anything occur that prevents the update from completing. To remind you the following message appears:

```
It is VERY important that a SAVEFILES is done before a new already been run.
Do you want to run a SAVEFILES:
```

If you answer ‘Y’ to this message the following sequence takes place (this should not be necessary if you have followed the Install instructions correctly). Answering ‘N’ will skip this sequence.

```
Please remove the Charisma update tape and insert the tape to have the Charisma SAVEFILES stored on it (after ensuring the write protect switch is NOT set to safe). When ready, press RETURN
```

If the update has been supplied on CD, this does not need to be removed.

The Savefiles routine will be run.

When this has completed, remove the savefiles tape and insert the update tape.
Phase 7

Prior to any upgrade it is also imperative that you make a backup copy of the old CHARISMA programs. The following message is displayed:

It is important that a backup of the OLD Charisma programs is made to a tape. Have you already performed this backup y/n:

If you answer ‘Y’ which, if you have followed the instructions correctly, should be the case, this phase is skipped. Answering ‘N’ will cause one of the following to display:

Old Charisma program backup not performed

Please remove the SAVEFILES tape and insert the tape to have the Charisma program backup stored on it (after ensuring the write protect switch is NOT set to safe). When ready, press RETURN

Please remove the Charisma update tape and insert the tape to have the Charisma program backup stored on it (after ensuring the write protect switch is NOT set to safe). When ready, press RETURN

If the update has been supplied on CD, this does not need to be removed.

Press RETURN to continue.

Starting backup of old version of Charisma

Backup of Charisma successful
Phase 8

The document layouts on your system may be customised to your specification. These are held in a standard directory that will be overwritten by the update. To preserve these prints, known as ‘Free Formats’, Install copies them out of the way while the directory is updated and moves them back after the new version of programs has been loaded. During this process a few informational messages may appear.

Once the Free Formats are safely stored, Install proceeds with the deletion of the old programs from the previous version so that the new versions can be saved in their place. The following message will appear:

```
** Now removing Charisma, please wait **
```

If the entire program set has not been deleted the following message will appear:

```
The removal of the old Charisma was not completed successfully. This is probably because some programs had incorrect permissions applied to them. Please type in the super user password to allow Install to complete removal of Charisma:
```

If this message appears, enter the SuperUser password for your UNIX system.
Phase 9

The new CHARISMA programs must now be loaded. The following message is displayed:

Insert the tape/CD containing the Charisma update and press RETURN

If you have not removed the update tape/CD since the start of this procedure simply press RETURN, otherwise reload the tape/CD and press RETURN.

If the update has been supplied on CD, the following message will be displayed.

Uncompressing new Version of Charisma, please wait..

Once this has completed, the CD-ROM drive will need to be unmounted. You will be prompted to enter the SuperUser root password.

CD unmount: please enter your 'root' password....
Password:

If the update has been supplied on tape, the following message will be displayed.

Searching for start of Charisma update

Loading new version of Charisma

A rotating bar will be displayed while all the new programs are installed, detailing the current CHARISMA program being loaded.

If the new programs are loaded successfully, the following message will appear:

Charisma will now need to be run to convert/create files
Press RETURN to run Charisma

Press RETURN.

If a load is unsuccessful Install will stop after displaying one of these messages:

The update tape/cd was created as a compressed version of Charisma. To uncompress this, the command gzip needs to be on the tape/cd and have enough space to uncompress the Data.

If gzip is in the bin directory, and there is enough space, there is another problem. Call BML support.

Installchar managed to uncompress the update file, but couldn’t unarchive it. The most likely cause of this problem is a lack of disk space. Rectify this and re-run installchar. If the problem occurs again after this has been done, call BML support.

Restore of Charisma failed for some reason.
Phase 10

Early in the update, Install checked to see if any files needed to be converted. At this point all files needing to be converted will be and any new files will be created if required. The following message will appear:

Several file changes have been made to the system, and require conversion.

This will take several minutes, and you MUST make sure that EVERYONE ELSE is logged out.

Do you want to ABORT this procedure ? Y

If you have followed the instructions correctly, this should be changed to N, and press RETURN. The Install will ask for a printer to be entered for any output from the conversions.

If you answer Y, to abort procedure, CHARISMA will not be run and the files will not get converted, Install will carry on running and complete the final phases.

Contact your BML Support Team if this is the case.

If the conversions have been run, once finished the Install will take you into the Charisma login prompt. Enter a User ID and password of Q (for quit), the following screen will be displayed:

Enter user id: Q
Password : Invalid password

Press RETURN at this stage so the Install can complete the final phases.
Phase 11

Within IQ, the system needs to set a terminal type to be used. Install will set this whether IQ is currently used or not, the following message is displayed:

```
Updating iqcap
```
Phase 12

With each upgrade of CHARISMA various terminal control features require updating, file permissions need setting and file ownerships need checking. These features are resident within the UNIX system. The following message will be displayed:

```
To update the terminal info.
Please type in the super user root password.
```

Enter the correct SuperUser root password in response to this message. Various messages relevant to the UNIX Operating System and the type of system it is resident on will be displayed. All these messages are informational only.
Phase 13

We strongly advise that, once the update has completed, you backup the new system. This avoids having to load the old system again and then rerun the update should an error occur at a later date. The following message is displayed:

```
You can optionally take a backup of the NEW Charisma Programs to tape. Do you wish to do this y/n?
```

If you answer ‘Y’ to this question, the following message is displayed:

```
Please remove the Charisma update tape and insert the tape to have the 2nd Charisma program backup stored on it (after ensuring the write protect switch is NOT set to safe). When ready, press RETURN
```

Insert the tape, ensuring it is not set to SAFE and press RETURN. The following messages are displayed:

```
Starting backup of new version of Charisma
Backup of Charisma successful
```
Phase 14

This phase details the information relevant to the upgrade performed.

"** Installation is complete **

The installation is now complete. An audit report has been produced and will now be printed on your default printer. Please fax this as soon as possible to BML support.

Fax number is: 01342 313593

Press RETURN

Press Return

A copy of the audit log can be found in the file Audit_0g in your home directory.

Installation started on (date) at (time)

finished on (date) at (time)
The upgrade is now complete and you may log into CHARISMA.

Other Points

The Install script will handle a number of situations e.g. SAVEFILES being done before it continues to the next phase, program backup being done before it continues to the next phase, conversions to be run etc., but it will **not** handle CHARISMA being deleted before installchar is run. This is because it will treat it as a new installation.

Any Difficulties?

Note: For any errors requiring support or technical help that occur during an installation, note any error codes which the Install displays.

If you have any difficulties during the installation, such as not enough space, the general course of action is to sort out the problem and re-run Install, and it should restart from where you left off. If the problems are more serious, it may be necessary to reload the old CHARISMA and/or the SAVEFILES tape. If this is the case, please contact your BML Support Team. Difficulties could occur if you have a very old version of installchar on the machine. To avoid any problems this could cause, ensure the steps described in “Running installchar” to load a new installchar program are performed.

Another difficulty that could occur is loading a CHARISMA UPDATE that has been compiled under a different version of COBOL. The Install script will report this.