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# MarkLogic Server

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## Installation Guide for All Platforms

MarkLogic 9  
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## 1.0 Requirements and Database Compatibility

This chapter introduces MarkLogic Server, lists the product requirements and supported platforms, and describes the database compatibility with previous releases. It includes the following sections:

- [Introduction](#)
- [MarkLogic Server Assumptions](#)
- [Memory, Disk Space, and Swap Space Requirements](#)
- [Supported Platforms](#)
- [Supported Filesystems](#)
- [Java Virtual Machine Requirements](#)
- [Upgrades and Database Compatibility](#)
- [MarkLogic Converters Installation Changes Starting at Release 9.0-4](#)

### 1.1 Introduction

MarkLogic Server is a powerful NoSQL database for harnessing your digital content base, complete with Enterprise features demanded by real world, mission-critical applications. MarkLogic enables you to build complex applications that interact with large volumes of content in JSON, XML, SGML, HTML, and other popular content formats, as well as binary formats. The unique architecture of MarkLogic ensures that your applications are both scalable and high-performance, delivering query results at search-engine speeds while providing transactional integrity over the underlying content repository. MarkLogic can be configured for a distributed environment, enabling you to scale your infrastructure through hardware expansion.

This installation guide explains the procedures needed to install MarkLogic on your system. It is intended for a technical audience. This document only explains how to install the software, not how to use the software. To learn how to get started using the software, see the rest of the MarkLogic documentation (available on [docs.marklogic.com](http://docs.marklogic.com)), including the following documents:

- *Getting Started With MarkLogic Server*
- *MarkLogic Server Release Notes*
- *MarkLogic Server Concepts Guide*
- *MarkLogic Server Administrator's Guide*
- *MarkLogic Server Application Developer's Guide*
- *MarkLogic Server Search Developer's Guide*
- *JavaScript Reference Guide*
- *MarkLogic XQuery and XSLT Function Reference*

## 1.2 MarkLogic Server Assumptions

When MarkLogic installs, it sets memory and other settings based on the characteristics of the computer in which it is running. MarkLogic is a scalable, multi-threaded server product, and as such it assumes it has the entire machine available to it, including the CPU and disk I/O capacity. It is important to follow the guidelines set up in this chapter. Furthermore, MarkLogic assumes there is only one MarkLogic Server process running on any given machine, so it is not recommended to run multiple instances of MarkLogic on a single machine.

MarkLogic Server expects the system clocks to be synchronized across all the nodes in a cluster. The clock skew should be less than 0.5 seconds. You should use a time service such as NTP to keep your system clocks synchronized. For more details, see the following Knowledge Base article:

<https://help.marklogic.com/knowledgebase/article/View/24/15/synchronizing-system-clocks-in-a-cluster>

## 1.3 Memory, Disk Space, and Swap Space Requirements

Before installing the software, be sure that your system meets the following requirements:

- For a production deployment, MarkLogic recommends at least 4G of memory per hyper thread or virtual CPU and at least 8 cores. For example, for a production system with 2 virtual CPUs (hardware threads) per core, the recommended memory is at least 64G (2 “threads” x 8 cores x 4G). See comment [1] in the table below.
- For a prototyping or development deployment, you must have a minimum of 2 GB of system memory. 4 GB or more is recommended, depending on database size. See comment [1] in the table below.
- 1.5 times the disk space of the total forest size. Specifically, each forest on a filesystem requires its filesystem to have at least 1.5 times the forest size in disk space (or, for each forest less than 48 GB, 3 times the forest size) when the `merge_max_size` database merge setting is set to the default of 48 GB. This translates to approximately 1.5 times the disk space of the source content after it is loaded. See comment [2] in the table below.

For example, if you plan on loading content that will result in a 200 GB database, reserve at least 300 GB of disk space. The disk space reserve is required for merges.

- System temp space sizing - when using telemetry allow for 20 GB maximum in system temp space, although normal usage will likely be less than 100 MB.

- On Linux systems, swap space equal to the amount of physical memory on the machine or 32 GB, whichever is lower. MarkLogic also recommends setting Linux Huge Pages on Red Hat Enterprise Linux 7 systems to 3/8 the size of your physical memory. For details on setting up Huge Pages, see <https://access.redhat.com/solutions/1578873> on the Redhat website. (Note: This is Subscriber Exclusive Content.)

If you have Huge Pages set up on a Linux system, your swap space on that machine should be equal to the size of your physical memory minus the size of your Huge Page (because Linux Huge Pages are not swapped), or 32 GB, whichever is lower. For example, if you have 48 GB of physical memory, and if you have Huge Pages set to 18 GB, then you need swap space of 30 GB (48 - 18).

At system startup on Linux machines, MarkLogic Server logs a message to the `ErrorLog.txt` file showing the Huge Page size, and the message indicates if the size is below the recommended level.

If you are using Red Hat Enterprise Linux 7, you must turn off Transparent Huge Pages (Transparent Huge Pages are configured automatically by the operating system). For details on disabling Transparent Huge Pages, see <https://kb.informatica.com/solution/23/PublishingImages/Disable%20Transparent%20Huepages%20on%20Linux%207.pdf> or see the Redhat instructions for how to disable transparent huge pages.

- On Windows systems twice the physical memory is also recommended for the swap (page) file. You configure this in the System Control Panel > Advanced system settings > Performance Settings > Advanced tab. Set the Virtual memory settings on that tab to twice your physical memory.

No.	Comment
[1]	MarkLogic automatically configures itself to reserve as much system memory as it can the first time it runs. If you need to change the default configuration, you can manually override these defaults at a later time using the Admin Interface.
[2]	You need at least 2 times the <code>merge max size</code> of free space per forest, regardless of the forest size. Therefore, with the default <code>merge max size</code> of 48 GB, you need at least 96 GB of free space. Additionally, if your journals are not yet created, you need 2 times the journal size of free disk space (if the journal space is not yet allocated). Therefore, to be safe, you need (with the default <code>merge max size</code> and a 2 GB journal size) at least 100 GB of free space for each forest, no matter what size the forest is.

## 1.4 Supported Platforms

MarkLogic Server is supported on the following platforms:

- Microsoft Windows Server 2012 (x64), Microsoft Windows Server 2016
- Windows 7 (x64) or later (see comment [1] in the table below)
- Red Hat Enterprise Linux 7 (x64) (see comments [2], [3], [4], [5] in the table below)
- CentOS 7 (x64) (see comments [2], [3], [4] in the table below)
- Amazon Linux (x64) (see comments [2], [3] in the table below)
- Mac OS X 10.11 or later (see comment [6] in the table below)
- Docker (see comment [7] in the table below)
- Support for CentOS 7 (x64), Red Hat Enterprise Linux 7 (x64) and Windows Server 2012 on the Azure Platform

No.	Comment
[1]	Desktop Microsoft Windows 7 (x64) and later are supported for development only. Use Windows Server for Production.
[2]	Either <code>none</code> , <code>mq-deadline</code> or <code>kyber</code> I/O scheduler is required to ensure efficient disk I/O for MarkLogic Server on Linux. When configuring an I/O scheduler with SSDs in a virtualized environment (including any cloud-based virtual machines), the OS I/O scheduling should be set to <code>none</code> for 4.x kernels or <code>noop/none</code> for older 3.x kernels. For more details, see <a href="http://help.marklogic.com/Knowledgebase/Article/View/8/0/notes-on-io-schedulers">http://help.marklogic.com/Knowledgebase/Article/View/8/0/notes-on-io-schedulers</a> , <a href="https://lonesysadmin.net/2013/12/06/use-elevator-noop-for-linux-virtual-machines/">https://lonesysadmin.net/2013/12/06/use-elevator-noop-for-linux-virtual-machines/</a> , and <a href="https://access.redhat.com/solutions/5427">https://access.redhat.com/solutions/5427</a> .
[3]	The <code>redhat-lsb-core</code> , <code>glibc</code> , <code>gdb</code> , and <code>cyrus-sasl-lib</code> packages are required on Red Hat Enterprise Linux. Additionally, on 64-bit Red Hat Enterprise Linux, both the 32-bit and the 64-bit <code>glibc</code> packages are required.
[4]	Red Hat Enterprise Linux 7 (x64) is also supported on VMware ESXi 6.0 (installed on bare metal).
[5]	The recommended Red Hat production configuration is one container per MarkLogic host.
[6]	Mac OS X is supported for development only. Conversion (Office and PDF) and entity enrichment are not available on Mac OS X. A 64-bit capable processor is required ( <a href="http://support.apple.com/kb/HT3696">http://support.apple.com/kb/HT3696</a> ).
[7]	One Docker container per host.

**Note:** MarkLogic now supports the 1-Click AWS option in AWS Marketplace. Because of this, the published MarkLogic AMIs will have data volume predefined.

## 1.5 Supported Filesystems

MarkLogic relies on the operating system for filesystem operations. While any filesystem that works properly (including under heavy load) should work, the following table lists the operating systems along with the filesystems under which they are supported. Other filesystems may work but have not been thoroughly tested by MarkLogic.

Operating System	Supported Filesystems
Linux (all varieties)	<p>XFS (recommended), EXT3, and EXT4 as well as the clustered filesystems for shared-disk failover mentioned in <a href="#">Requirements for Shared-Disk Failover</a> in the <i>Scalability, Availability, and Failover Guide</i>.</p> <p><b>Warning</b> Do not use <code>data=writeback</code> with EXT3 and EXT4 filesystems.</p> <p>NAS is supported on Red Hat Enterprise Linux 7 and NetAPP.</p>
Windows	NTFS
Mac OS	HFS+
All	Hadoop HDFS, Amazon S3 (no journaling with S3)

Additionally, HDFS storage is supported with MarkLogic on the HDFS platforms described in [HDFS Storage](#) in the *Query Performance and Tuning Guide*.

**Note:** The Solaris OS is not certified for MarkLogic 9.

## 1.6 Java Virtual Machine Requirements

MarkLogic features such as HDFS storage and Managed Clusters on EC2 require a JVM. MarkLogic runs in environments where no JVM is available, but Java-dependent features will not work without a one.

MarkLogic supports the Java 8 version of the following JVMs:

- Oracle/Sun
- OpenJDK

By default, MarkLogic looks for Java in the location specified via the `JAVA_HOME` environment variable or in a specific set of default locations. If `JAVA_HOME` is not set in the startup environment, then MarkLogic uses the first JRE or JDK found in one of the following locations. These locations are searched in the order listed.

- `/usr/java/default`
- `/usr/java/latest`
- `/usr/java/jdk1.N*` where `N` is a supported Java version. For example, `/usr/java/jdk1.7.0_79` qualifies if Java 7 is a supported Java version.
- `/usr/lib/jvm/java`
- `/usr/lib/jvm/java-openjdk`
- `/usr/lib/jvm/jre-1.N.0-*.x86_64` where `N` is a supported Java version, such as Java 8.

If you have Java installed in a different location, you can communicate your `JAVA_HOME` to MarkLogic through the file `/etc/marklogic.conf`. For example:

```
cat > /etc/marklogic.conf
JAVA_HOME=/path/to/your/jdk
```

## 1.7 Upgrades and Database Compatibility

MarkLogic 9 supports upgrades from MarkLogic 7 or from MarkLogic 8 or later databases. If you are upgrading from an earlier version of MarkLogic Server, you must first upgrade to 7 or 8 before moving to MarkLogic 9. For the procedure for upgrading, see “Upgrading from Previous Releases” on page 12.

During the upgrade, the Security database, the Schemas database, and the configuration files are automatically upgraded. The Security database is upgraded with the latest execute privileges and the Schemas database is upgraded with the latest version of the Schemas used by MarkLogic Server. The upgrade occurs as part of the installation procedure.

Databases that contain your own content are also upgraded to work with MarkLogic 9; once you upgrade to MarkLogic 9, you will no longer be able to use that database with previous versions of MarkLogic.

**Note:** MarkLogic Corporation strongly recommends performing a backup of your databases before upgrading to MarkLogic 9. Additionally, MarkLogic Corporation recommends that you first upgrade to the latest maintenance release of the major version of MarkLogic you are running before upgrading to MarkLogic 9.

For the procedure for upgrading to MarkLogic 9, see “Upgrading from Previous Releases” on page 12. For details about known incompatibilities between MarkLogic 7 or MarkLogic 8 and MarkLogic 9, see [Known Incompatibilities with Previous Releases](#) in the *Release Notes*.

This section contains database compatibility information between various releases, and includes the following sections.



- [Prerequisites for Application Services Portion of the Upgrade](#)
- [Compatibility of MarkLogic 9 Databases With MarkLogic 7 and 8](#)

### 1.7.1 Prerequisites for Application Services Portion of the Upgrade

When upgrading from releases prior to MarkLogic 7 to MarkLogic 9, the upgrade reconfigures the Docs and App Services App Servers, which by default are on port 8000 and port 8002 in older releases. In order for those App Servers to be upgraded, the following conditions must be met:

- Either no App Server is running on port 8000 or the App Server on port 8000 has a root of `Docs/`.
- Either no App Server is running on port 8002 or the App Server on port 8002 has a root of `Apps/` OR `Apps/appbuilder`.

If the above conditions are met, then those App Servers are reconfigured during the MarkLogic 9 upgrade and the resulting configurations have the following settings:

App-Services:

App-Services App Server	
Port	8000
Name	App-Services
Root	Apps/
Error Handler	error-handler.xqy
URL Rewriter	rewriter.xqy
Database	App-Services

Manage:

Manage App Server	
Port	8002
Name	Manage
Root	Apps/
Error Handler	manage/error-handler.xqy
URL Rewriter	manage/rewriter.xqy

Manage App Server	
Database	App-Services
Privilege	manage

If the conditions are not met, then the upgrade logs an error to the `ErrorLog.txt` file and the Application Services portion of the upgrade is skipped. MarkLogic Server will still operate, but you will not be able to use Query Console, the Management API, and the rest of the Application Services features. To restore the Application Services functionality after a failed upgrade, create two App Servers with the configurations shown above. If you have any problems, contact MarkLogic technical support.

### 1.7.2 Compatibility of MarkLogic 9 Databases With MarkLogic 7 and 8

MarkLogic 9 does not require a reindex from MarkLogic 7 or MarkLogic 8 databases. Therefore, if you are upgrading from MarkLogic 7 or MarkLogic 8, the database will not reindex, even if `reindex enable` is set to `true`.

## 1.8 MarkLogic Converters Installation Changes Starting at Release 9.0-4

*MarkLogic converters* are used to convert Microsoft Office Word, Excel, and PowerPoint documents, as well as Adobe PDF files, to XHTML. *MarkLogic filters* are used to filter a variety of document formats, extract metadata and text from them, and return XHTML. The following MarkLogic XQuery API functions, described in the *MarkLogic XQuery and XSLT Function Reference*, provide this functionality:

```

xdmp:word-convert
xdmp:excel-convert
xdmp:powerpoint-convert
xdmp:pdf-convert
xdmp:document-filter

```

Converters/filters are also used as part of *conversion pipeline* in Content Processing Framework. For more details, see [The Default Conversion Option](#) in the *Content Processing Framework Guide*.

Prior to MarkLogic release 9.0-4, converters/filters were bundled and automatically installed with MarkLogic Server. Starting at MarkLogic release 9.0-4, converters/filters are offered as a separate package, *MarkLogic Converters*.

This change provides better flexibility and enables you to install/uninstall MarkLogic converters/filters separately from MarkLogic Server.

With this change, MarkLogic Server does not include MarkLogic Converters. To use converters/filters, install both packages: MarkLogic Server and MarkLogic Converters. An `XDMP-CVTNOTFOUND` error will be thrown upon an attempt to use converters/filters on a MarkLogic node with no MarkLogic Converters installed.

The version of MarkLogic Converters is synchronized with the version of MarkLogic Server. For example, MarkLogic Converters 9.0-4 corresponds to MarkLogic Server 9.0-4 and may be installed with it.

You can obtain the version of MarkLogic Converters installed on a node by calling to MarkLogic server-side API function `xdmp:host-status` and examining the value of the `converters-version` element in the response. If the converters package is not installed on a node, the `converters-version` element will be empty.

MarkLogic Converters packages for all supported platforms are available for download at the same location where MarkLogic Server packages are available, namely at <http://developer.marklogic.com>.

If you want to use the converters package with MarkLogic 9.0-4 or later, you will have to perform a two-step installation: first install MarkLogic Server and then install MarkLogic Converters.

For details on MarkLogic Server and MarkLogic Converters installation for all supported platforms, see “Installing MarkLogic” on page 16.

If you want to uninstall MarkLogic 9.0-4 or later, and if the converters package was previously installed with it, you will have to perform a two-step uninstall: first uninstall MarkLogic Converters and then uninstall MarkLogic Server.

For details on MarkLogic Server and MarkLogic Converters uninstall for all supported platforms, see “Removing MarkLogic” on page 33.

## 2.0 Procedures

This section describes the following procedures to install MarkLogic on your system.

- [Upgrading from Previous Releases](#)
- [Installing MarkLogic](#)
- [Starting MarkLogic Server](#)
- [Configuring the First and Subsequent Hosts](#)
- [Entering a License Key](#)
- [Checking for the Correct Software Version](#)
- [Configuring MarkLogic Server to Run as a Non-Daemon User](#)
- [Removing MarkLogic](#)

### 2.1 Upgrading from Previous Releases

If you have previously installed MarkLogic on a machine, you must uninstall the old release before proceeding with the new installation. For information on removing the software, see “Removing MarkLogic” on page 33 or the *Installation Guide* from the previous release. This section describes the following information and upgrade paths:

- [Windows Service Parameters](#)
- [Upgrading from Release 9.0-1 or Later](#)
- [Upgrading from MarkLogic 7 or MarkLogic 8](#)
- [Upgrading from Release 6.0 or earlier](#)

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

**Warning:** MarkLogic Server does not support downgrades. Once you have upgraded to a later release, you cannot downgrade to your original release. To retain the option to restore to a previous version of MarkLogic Server, make a complete backup of your content and security databases before upgrading.

#### 2.1.1 Windows Service Parameters

When upgrading MarkLogic on Windows as a different user from the user that installed the previous version, the MarkLogic service parameters in the Windows registry will be changed. When the old version of MarkLogic is uninstalled, the service is deleted from the registry, including any customizations to the service parameters. When the new version of MarkLogic is installed, the service is re-created in the registry, with the default service parameters.

Before starting the upgraded version of MarkLogic, make any customization to the service parameters. Otherwise the default service parameters will be set and MarkLogic will start up running as the local system user. Any MarkLogic configuration files saved as the local system user (such as those modified when making changes in the Admin Interface) will be created with the Windows file permissions for the local system user.

**Note:** When you make changes the user in the service parameters, you should also change data directory file permissions because, if MarkLogic is running for any amount of time as the local system user, it is likely that it has written files as the local system user.

### 2.1.2 Upgrading from Release 9.0-1 or Later

To upgrade from release 9.0-1 or later to the current MarkLogic 9 release (for example, if you are installing a maintenance release of MarkLogic 9), perform the following basic steps:

1. Stop MarkLogic Server (as described in step 1 of “Removing MarkLogic” on page 33).
2. Uninstall the old MarkLogic 9 release (as described in “Removing MarkLogic” on page 33).

**Note:** If you want to uninstall MarkLogic 9.0-4 or later, and if the converters package was previously installed with it, you will have to perform a two-step uninstall: first uninstall MarkLogic Converters and then uninstall MarkLogic Server. For more detail, see “MarkLogic Converters Installation Changes Starting at Release 9.0-4” on page 10 and “Removing MarkLogic” on page 33.

3. Install the new MarkLogic 9 release (as described in “Installing MarkLogic” on page 16).

**Note:** If you want to install MarkLogic 9.0-4 or later, and you plan to use the converters package with it, you will have to perform a two-step installation: first install MarkLogic Server and then install MarkLogic Converters. For more detail, see “MarkLogic Converters Installation Changes Starting at Release 9.0-4” on page 10 and “Installing MarkLogic” on page 16.

4. Start MarkLogic Server (as described in “Starting MarkLogic Server” on page 21).
5. Open the Admin Interface in a browser (<http://localhost:8001/>).
6. When the Admin Interface prompts you to upgrade the databases and the configuration files, click the button to confirm the upgrade.

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

If you are upgrading two clusters that make use of database replication to replicate the Security database on the master cluster, then you must enter the following to manually upgrade the Security database configuration files on the machine that hosts the replica Security database:

```
http://host:8001/security-upgrade-go.xqy?force=true
```

**Warning:** There is no direct upgrade path from Early Access releases of MarkLogic 9 to this release. If you need to move any data from an Early Access release to this release, you must re-create the data in the current release.

### 2.1.3 Upgrading from MarkLogic 7 or MarkLogic 8

MarkLogic 9 installs in the same default directory as earlier versions of MarkLogic, so there is no need to move any old files around. The upgrade to MarkLogic 9 does incorporate an automatic update to the Security database and to the configuration files. The Security database upgrade occurs when you first access the Admin Interface after the MarkLogic 9 installation.

When upgrading to MarkLogic 9, you must first uninstall previous releases of MarkLogic Server. Uninstalling a previous release of MarkLogic does not remove or delete the user data files (the forests and configuration information).

**Note:** If you are upgrading a cluster of two or more servers, you must first upgrade the server in which the Security database is mounted. The Security database must be available before subsequent hosts can join the cluster.

The basic steps to upgrade from an earlier version to MarkLogic 9 are as follows:

1. As a precaution, perform database backups on your earlier versions of MarkLogic Server databases.
2. If you are upgrading from MarkLogic 7 and do not want to reindex a database, disable reindexing for that database before installing the new release (for example, set `reindexer enable` to `false` on the Database Configuration page of the Admin Interface in MarkLogic 7). The entire database will be reindexed after upgrading to MarkLogic 9 unless you disable reindexing. For details, see “Upgrades and Database Compatibility” on page 8. You can always reindex the database later by setting `reindexer enable` database configuration option to `true`.
3. Stop MarkLogic Server (as described in step 1 of “Removing MarkLogic” on page 33).
4. Uninstall the old MarkLogic release (as described in “Removing MarkLogic” on page 33).
5. Install the new MarkLogic 9 release (as described in “Installing MarkLogic” on page 16).

**Note:** If you want to install MarkLogic 9.0-4 or later, and you plan to use the converters package with it, you will have to perform a two-step installation: first install MarkLogic Server and then install MarkLogic Converters. For more detail, see “MarkLogic Converters Installation Changes Starting at Release 9.0-4” on page 10 and “Installing MarkLogic” on page 16.

6. Start MarkLogic Server (as described in “Starting MarkLogic Server” on page 21).
7. Open the Admin Interface in a browser (<http://localhost:8001/>).
8. When the Admin Interface prompts you to upgrade the Security database and the configuration files, click the button to confirm the upgrade.
9. If you have CPF installed in any database and you want to use any of the new pipelines in MarkLogic 9, then you must reinstall CPF for those databases. To reinstall CPF for a database, in the Admin Interface navigate to Databases -> *database-name* -> Content Processing, click the Install tab, and click the Reinstall button. This loads all of the new pipelines into the triggers database configured for that database.

There are some known application incompatibilities between MarkLogic 8 and MarkLogic 9, as well as some incompatibilities between MarkLogic 7 and MarkLogic 9. Some of the incompatibilities might require minor code changes to your applications. For details on these incompatibilities, see the [Release Notes](#).

#### **2.1.4 Upgrading from Release 6.0 or earlier**

MarkLogic 9 only supports upgrading from Release 7.0 or later; it does not provide a direct upgrade path for previous releases of MarkLogic Server. If you are upgrading from a 6.0 or earlier release of MarkLogic Server, either install this release as a clean installation or upgrade your existing release to the latest Release 7.0 or 8.0 before installing this release. If you are upgrading from 6.0 and do not want to reindex your content, set the `reindexer enable` to `false` before upgrading. You can run MarkLogic 9 in either 7.0 or 8.0 compatibility mode, as described in “Upgrades and Database Compatibility” on page 8.

## 2.2 Installing MarkLogic

This section describes the procedure for installing MarkLogic Server on each platform. Perform the procedure corresponding to the platform to which you are installing.

Platform	Perform the following:
Windows x64	<ol style="list-style-type: none"> <li>1. If you are upgrading from a previous MarkLogic release, review “Upgrading from Previous Releases” on page 12 and perform necessary steps from that section first.</li> <li>2. Download the MarkLogic Server installation package to your desktop. The latest installation packages are available from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a>.</li> <li>3. Double click the <code>MarkLogic-9.0-1-amd64.msi</code> icon to start the installer.  <b>Note:</b> If you are installing a release other than 9.0-1, double-click on the appropriately named installer icon.</li> <li>4. The Welcome page displays. Click Next.</li> <li>5. Select Typical.</li> <li>6. Click Install.</li> <li>7. Click Finish.  <b>Note:</b> If you are installing MarkLogic 9.0-4 or later, and you plan to use the converters package, perform also the following steps:</li> <li>8. Download the MarkLogic Converters package for Windows platform (e.g. <code>MarkLogicConverters-9.0-4-amd64.msi</code>) from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a> to your desktop.</li> <li>9. Double click the <code>MarkLogicConverters-9.0-4-amd64.msi</code> icon to start the converters' installer.</li> <li>10. The welcome page displays: “Welcome to the MarkLogic Converters Setup Wizard”. Click Next.</li> <li>11. “Choose Setup Type” page displays. Select Typical.</li> <li>12. “Ready to Install” page displays. Click Install to start the installation.</li> <li>13. “Installing MarkLogic Converters” page displays. You may observe the progress there.</li> <li>14. Then the final page displays: “Completing the MarkLogic Converters Setup Wizard”. Click Finish.</li> </ol>



Platform	Perform the following:
Red Hat Linux x64	<ol style="list-style-type: none"> <li data-bbox="428 279 1349 384">1. If you are upgrading from a previous MarkLogic release, review “Upgrading from Previous Releases” on page 12 and perform necessary steps from that section first.</li> <li data-bbox="428 411 1341 516">2. Download the MarkLogic Server installation package to <code>/tmp</code> or another location using your web browser. The latest installation packages are available from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a>.  <b>Note:</b> If you are using Firefox or another browser that is configured to associate <code>rpm</code> files, the browser will prompt you for the <code>root</code> password (if you are not already running as <code>root</code>) and you can follow the prompts to complete the installation. When the installation is complete, you can skip the next step. Otherwise, continue to the next step.</li> <li data-bbox="428 814 1370 1024">3. As the <code>root</code> user, install the package with the following command:  <pre>rpm -i /tmp/MarkLogic-9.0-1.x86_64.rpm</pre> <b>Note:</b> If you are installing a release other than 9.0-1, replace 9.0-1 with the appropriate release number.</li> <li data-bbox="428 1066 1409 1360">4. If you are using HDFS, make sure the server is configured to use HDFS with a Hadoop HDFS client and any needed environment variables set in the <code>/etc/sysconfig/MarkLogic</code> file. For details, see <a href="#">HDFS Storage</a> in the <i>Query Performance and Tuning Guide</i> and “Java Virtual Machine Requirements” on page 7.  <b>Note:</b> If you are installing MarkLogic 9.0-4 or later, and you plan to use the converters package, also perform the following steps:</li> <li data-bbox="428 1402 1414 1507">5. Download the MarkLogic Converters package for Linux platform (for example, <code>MarkLogicConverters-9.0-4.x86_64.rpm</code>) from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a> to <code>/tmp</code> or another location.</li> <li data-bbox="428 1528 1370 1633">6. As the <code>root</code> user, install the package with the following command:  <pre>rpm -i /tmp/MarkLogicConverters-9.0-4.x86_64.rpm</pre></li> </ol>

Platform	Perform the following:
CentOS Linux	<ol style="list-style-type: none"> <li data-bbox="428 279 1349 384">1. If you are upgrading from a previous MarkLogic release, review “Upgrading from Previous Releases” on page 12 and perform necessary steps from that section first.</li> <li data-bbox="428 411 1341 516">2. Download the MarkLogic Server installation package to <code>/tmp</code> or another location using your web browser. The latest installation packages are available from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a>.  <b>Note:</b> If you are using Firefox or another browser that is configured to associate <code>rpm</code> files, the browser will prompt you for the <code>root</code> password (if you are not already running as <code>root</code>) and you can follow the prompts to complete the installation. When the installation is complete, you can skip the next step. Otherwise, continue to the next step.</li> <li data-bbox="428 814 1370 919">3. As the <code>root</code> user, install the package with the following command:  <pre>rpm -i /tmp/MarkLogic-9.0-5.x86_64.rpm</pre> <b>Note:</b> If you are installing a release other than 9.0-5, replace 9.0-5 with the appropriate release number.</li> <li data-bbox="428 1066 1409 1245">4. If you are using HDFS, make sure the server is configured to use HDFS with a Hadoop HDFS client and any needed environment variables set in the <code>/etc/sysconfig/MarkLogic</code> file. For details, see <a href="#">HDFS Storage</a> in the <i>Query Performance and Tuning Guide</i> and “Java Virtual Machine Requirements” on page 7.  <b>Note:</b> If you are installing MarkLogic 9.0-4 or later, and you plan to use the converters package, also perform the following steps:</li> <li data-bbox="428 1398 1414 1503">5. Download the MarkLogic Converters package for Linux platform (for example, <code>MarkLogicConverters-9.0-5.x86_64.rpm</code>) from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a> to <code>/tmp</code> or another location.</li> <li data-bbox="428 1530 1414 1667">6. As the <code>root</code> user, to be able to run the <code>rpm</code> for MarkLogic, converters, install <code>yum</code> with the following command:  <pre>yum install libgcc libgcc.i686 libstdc++ libstdc++.i686</pre></li> <li data-bbox="428 1694 1370 1799">7. As the <code>root</code> user, install the package with the following command:  <pre>rpm -i /tmp/MarkLogicConverters-9.0-5.x86_64.rpm</pre></li> </ol>

Platform	Perform the following:
Mac OS X	<ol style="list-style-type: none"> <li data-bbox="428 279 1414 384">1. If you are upgrading from a previous MarkLogic release, review “Upgrading from Previous Releases” on page 12 and perform necessary steps from that section first.</li> <li data-bbox="428 411 1414 516">2. Download the MarkLogic Server installation package to your desktop. The latest installation packages are available from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a>.</li> <li data-bbox="428 543 1414 648">3. Double click the <code>MarkLogic-9.0-1-x86_64.dmg</code> icon to open the folder that contains the <code>MarkLogic-9.0-1-x86_64.pkg</code> installer. Double click on the installer to start.</li> <li data-bbox="428 676 1414 707">4. The Welcome page displays. Click Continue.</li> <li data-bbox="428 735 1414 798">5. In the Select a Destination window, select a destination to install MarkLogic Server or Continue to select the default destination.</li> <li data-bbox="428 825 1414 888">6. In the Installation Type window, click Install. An Installation window appears that displays the progress of the installation.</li> <li data-bbox="428 915 1414 947">7. When the installation Summary window appears, click Close.</li> <li data-bbox="428 974 1414 1037">8. A MarkLogic control window appears from which you can start/stop MarkLogic Server, open the Admin Interface, and view the Error Log.  <b>Note:</b> If you are installing MarkLogic 9.0-4 or later, and you plan to use the converters package, perform also the following steps:</li> <li data-bbox="428 1064 1414 1169">9. Download the MarkLogic Converters package for Mac OS platform (e.g. <code>MarkLogicConverters-9.0-4-x86_64.dmg</code>) from <a href="http://developer.marklogic.com">http://developer.marklogic.com</a> to your desktop.</li> <li data-bbox="428 1197 1414 1302">10. Double click the <code>MarkLogicConverters-9.0-4-x86_64.dmg</code> icon to open the folder that contains <code>MarkLogicConverters-9.0-4-x86_64.pkg</code> installer. Double click on the installer to start.</li> <li data-bbox="428 1329 1414 1360">11. The Welcome page displays. Click Continue.</li> <li data-bbox="428 1388 1414 1419">12. In the Select a Destination window, select the default destination.</li> <li data-bbox="428 1446 1414 1509">13. In the Installation Type window, click Install. An Installation window appears that displays the progress of the installation.</li> <li data-bbox="428 1537 1414 1568">14. When the installation Summary window appears, click Close.</li> </ol>

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

**Note:** It is not recommended to install the converters while MarkLogic Server is running. The reason for this is that the server checks the converters presence and version number only upon start-up. So the server will not have accurate information about the converters in this case. The recommended installation procedure is to stop the server if it is running, install or upgrade the server, install the converters, then start the server.

The following table shows the installation directory (<marklogic-dir>) and the default data directory for each platform:

Platform	Installation Directory	Default Data Directory (for configuration and log files)
Windows	c:\Program Files\MarkLogic\	c:\Program Files\MarkLogic\Data
Red Hat Linux	/opt/MarkLogic	/var/opt/MarkLogic
Mac OS X	~/Library/MarkLogic	~/Library/Application Support/MarkLogic/Data

The default forest directory is the same as the default data directory if the optional data directory is not specified during forest creation. On UNIX platforms, if you want MarkLogic Server to use another location for its default data directory, make your data directory (/var/opt/MarkLogic on Linux) a soft link to the alternate location.

In MarkLogic release 9.0-4 and later, MarkLogic Converters installation directory remains the same as in previous releases, namely:

Platform	Converters Installation Directory
Windows	c:\Program Files\MarkLogic\Converters
Red Hat Linux	/opt/MarkLogic/Converters
Mac OS X	~/Library/MarkLogic/Converters

**Note:** When a new node joins an existing cluster, the server does not try to figure out automatically whether the MarkLogic Converters package is needed or not. An `XDMP-CVTNOTFOUND` error will be thrown if converters/filters built-in functions are called on nodes that do not have MarkLogic Converters installed.

## 2.3 Starting MarkLogic Server

MarkLogic Server will automatically start when the computer reboots. To start MarkLogic Server without rebooting, perform the following command for the corresponding platform:

Platform	Perform the following:
Windows	<p>Select Start &gt; Programs &gt; MarkLogic Server &gt; Start MarkLogic Server.</p> <p><b>Note:</b> When you start MarkLogic Server from the Start menu, the Windows service configuration for MarkLogic Server is set to start automatically. Also, if you are using Windows Vista or Windows 7, to start the service you must right-click the Start MarkLogic Server link in the Start menu and choose Run as Administrator, then choose to allow the action.</p>
Red Hat Linux	<p>As the <code>root</code> user, enter the following command:</p> <pre>/sbin/service MarkLogic start</pre>
Mac OS X	<p>Select System Preferences &gt; MarkLogic to open the MarkLogic control window. Click Start MarkLogic Server.</p>

This starts all of the App Servers that are configured on your MarkLogic Server.

### 2.3.1 Verifying Converters Installation Starting at Release 9.0-4

In MarkLogic 9.0-4 or later, after starting MarkLogic Server, you may verify whether the converters package was installed with use of the XQuery API function `xdmp:host-status` or the JavaScript API function `xdmp.hostStatus`.

Suppose you want to verify whether converters are installed on a node with hostname `englab.marklogic.com`.

Open Query Console URL in a browser:

```
http://englab.marklogic.com:8000/qconsole/
```

Perform steps described in one of the following sub-sections, depending on your API of choice.

#### 2.3.1.1 Obtaining Converters Version with XQuery API

In the Query Console, select XQuery as Query Type.

Execute the following code:

```
xquery version "1.0-ml";
xdmp:host-status(xdmp:host("englab.marklogic.com"))
```

In the response, look for the `converters-version` element, for example:

```
<converters-version>9.0-4</converters-version>
```

If converters are not installed, the above element will have an empty value.

### 2.3.1.2 Obtaining Converters Version with JavaScript API

In the Query Console, select JavaScript as Query Type.

Execute the following code:

```
'use strict';
xdmp.hostStatus(xdmp:host("englab.marklogic.com"))
```

In the response, look for the `convertersVersion` element, for example:

```
"convertersVersion" : "9.0-4"
```

If converters are not installed, the above element will have an empty string as its value.

## 2.4 Configuring the First and Subsequent Hosts

The following configuration procedures differ depending on if you run MarkLogic Server in a cluster configuration or on a single host. The procedures are as follows:

- [Configuring a Single Host or the First Host in a Cluster](#)
- [Configuring an Additional Host in a Cluster](#)
- [Leaving a Cluster and Becoming a Single Host](#)

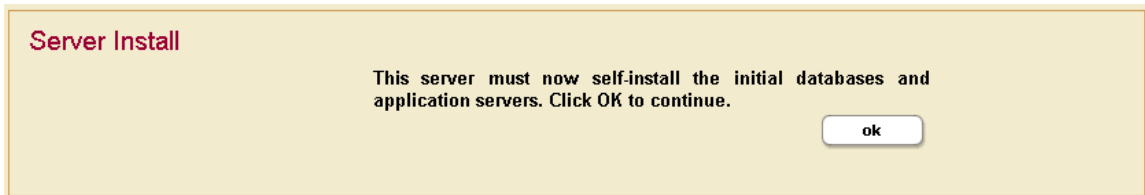
If you are configuring MarkLogic Server as a standalone host, or if this is the first host in a cluster configuration, follow the installation instructions in Section [2.4.1](#). Otherwise, follow the installation instructions in Section [2.4.2](#).

If you are upgrading a cluster to a new release, see [Upgrading a Cluster to a New Maintenance Release of MarkLogic Server](#) in the *Scalability, Availability, and Failover Guide*. The Security database and the Schemas database must be on the same host, and that host should be the first host you upgrade when upgrading a cluster.

## 2.4.1 Configuring a Single Host or the First Host in a Cluster

To configure this installation as a single host, or as the first host in a cluster, perform the following steps:

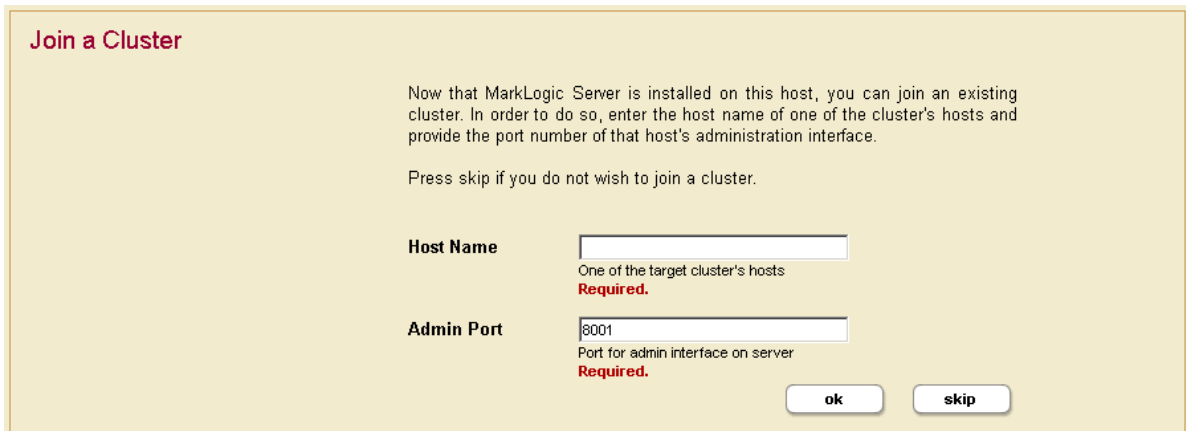
1. Install MarkLogic and start MarkLogic as described in “Installing MarkLogic” on page 16 and “Starting MarkLogic Server” on page 21.
2. Log into the Admin Interface in a browser. It is on port 8001 of the host in which MarkLogic is running (for example, on the localhost, `http://localhost:8001`). The Server Install page appears.



**Server Install**

This server must now self-install the initial databases and application servers. Click OK to continue.

3. Click OK to continue.
4. Wait for the server to restart.
5. After the server restarts, you will be prompted to join a cluster.



**Join a Cluster**

Now that MarkLogic Server is installed on this host, you can join an existing cluster. In order to do so, enter the host name of one of the cluster's hosts and provide the port number of that host's administration interface.

Press skip if you do not wish to join a cluster.

**Host Name**   
One of the target cluster's hosts  
**Required.**

**Admin Port**   
Port for admin interface on server  
**Required.**

6. Click Skip.

7. You will be prompted to create an admin user. Enter the login name and password for the admin user.

**Security Setup**

MarkLogic Server has detected that Administration has not been secured. Please supply a user name and password for the Administrative user to set up security.

You also need to specify a realm for this security database. This is the realm that will be displayed to clients authenticating against this database. Since this value is used in password hashes it is recommended that you not change this value once it is set. Please read the further documentation about realms.

<b>Admin</b>	<input type="text" value="admin"/> User/Login name (unique) <b>Required. You must supply a value for user-name.</b>
<b>Password</b>	<input type="password" value="*****"/> Encrypted Password. <b>Required.</b>
<b>Confirm Password</b>	<input type="password" value="*****"/> Encrypted Password. <b>Required.</b>
<b>Realm</b>	<input type="text" value="public"/> The authentication realm.

8. Click OK.
9. You will be prompted to log in with your admin username and password.

You will now see the Admin Interface. If you do not need to add any hosts at this time, skip to Section [2.6](#) on page 28.

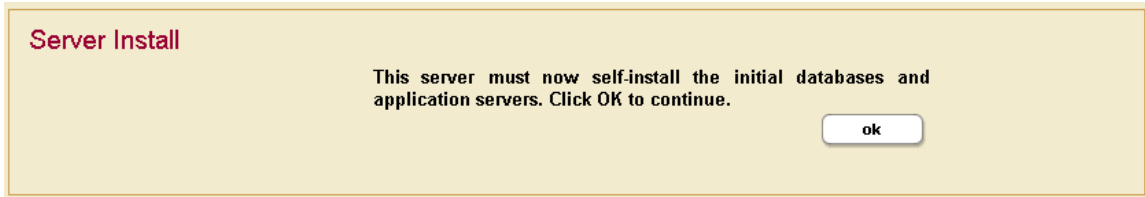
## 2.4.2 Configuring an Additional Host in a Cluster

All hosts in a cluster have to be on the same platform. To configure this installation as an additional host in a cluster of the same platform, perform the following steps:

1. On the node you want to add to an existing cluster, install MarkLogic and start MarkLogic, as described in “Installing MarkLogic” on page 16 and “Starting MarkLogic Server” on page 21.



2. Log into the Admin Interface in a browser. It is on port 8001 of the host in which MarkLogic is running (for example, on the localhost, `http://localhost:8001`). The Server Install page appears.

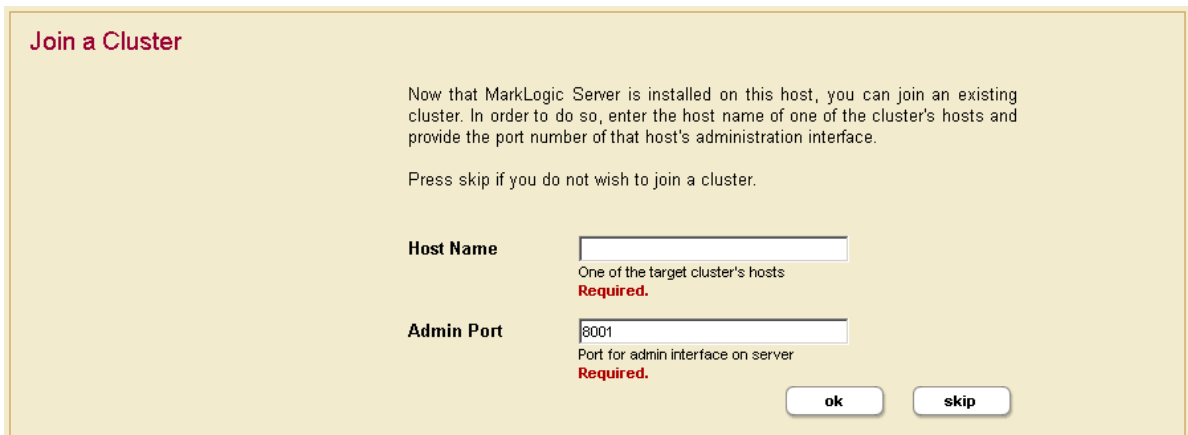


**Server Install**

This server must now self-install the initial databases and application servers. Click OK to continue.

ok

3. Click OK to continue.
4. Wait for the server to restart.
5. After the server restarts, you will be prompted to join a cluster.



**Join a Cluster**

Now that MarkLogic Server is installed on this host, you can join an existing cluster. In order to do so, enter the host name of one of the cluster's hosts and provide the port number of that host's administration interface.

Press skip if you do not wish to join a cluster.

**Host Name**   
One of the target cluster's hosts  
**Required.**

**Admin Port**   
Port for admin interface on server  
**Required.**

ok skip

6. Enter the DNS name or the IP address of one of the machines in the cluster. For instance, if this is the second host you are installing, you can enter the DNS name of the first host you installed.
7. Click OK.
8. You will be prompted for an admin username and password. You can use the admin username and password you created when installing the first host. Click OK.

9. Select a Group to assign this host. Click OK.

**Join a Cluster**

In order to join this MarkLogic cluster, the new host must be assigned to one of the cluster's groups and its name confirmed. Please select a group to join and confirm the new host's name:

**Group**  The groups in the cluster

**Host Name**  The name of the new host in the cluster.

10. Click OK to confirm that you are joining the cluster.

**Join a Cluster**

You are about to join this MarkLogic cluster. To proceed click OK.

11. You have now joined the cluster.

**Joined a Cluster**

**Joined a Cluster**  
**MarkLogic Server**

A new host has joined the MarkLogic cluster. Press ok to transfer cluster configuration information to the new host.

12. Click OK to transfer the cluster configuration information.

You have completed the process to join a cluster and will now see the Admin Interface.

### 2.4.3 Leaving a Cluster and Becoming a Single Host

If your host is currently in a cluster of multiple hosts, and you would like to leave the cluster and switch to a single host environment, follow the steps in this section.

A host cannot leave a cluster if there are still forests assigned to it or if it has any foreign clusters associated with it. You must delete all forests assigned to the host and de-couple any clusters associated with a host before you can leave the cluster. However, you can delete the configuration only for a forest and the forest data will remain on the filesystem, allowing you to add the forest back to the host after changing the configuration. For instructions on adding a forest to a host, see the *Administrator's Guide*.

Perform the following steps to leave the cluster to which a host is connected:

1. Run the Admin Interface from the host you want to remove from the cluster.
2. Click the Hosts icon in the left menu tree. The Host Summary page appears.
3. Click the name of the host you want to remove from the cluster, either from the left menu tree or from the Host Summary page. The Host Configuration page appears:

The screenshot shows the 'Host Configuration' dialog box. The title bar is dark red with the text 'Host Configuration'. Below the title bar are four tabs: 'Summary', 'Configure', 'Status', and 'Help'. The 'Configure' tab is selected. The dialog area is light yellow and contains the following fields:

- host name\***: A text input field containing 'raymond.marklogic.com'. Below it is the text 'The internet host name.'
- group\***: A dropdown menu showing 'Default'. Below it is the text 'The group the host belongs to.'
- bind port\***: A text input field containing '7999'. Below it is the text 'The distributed protocol server socket bind internet port number.'

At the top right of the dialog area, there are 'ok' and 'cancel' buttons. Below the fields, there is a 'leave' button. At the bottom of the dialog, there are 'ok' and 'cancel' buttons. A note at the bottom left of the dialog area reads: '\* -- requires restart of one or more hosts'.

**Note:** The Leave button only appears if the Admin Interface is running from this host.

4. Click the Leave button
5. Click OK to confirm leaving the cluster.
6. The host restarts to load the new configuration.

7. Follow the instructions in sections “Configuring a Single Host or the First Host in a Cluster” on page 23 or “Configuring an Additional Host in a Cluster” on page 24 as appropriate.

## 2.5 Entering a License Key

MarkLogic will run without a license key, but after installing MarkLogic you should enter a valid license key for the usage and features for which you are licensed. At any time, you can change the license key for a host from the Host Status page.

You might need to change the license key if your license key expires, if you need to use some features that are not covered in your existing license key, if you upgrade your hardware with more CPUs and/or more cores, if you need a license that covers a larger database, if you require different languages, or for various other reasons. Changing the license key sometimes results in an automatic restart of MarkLogic (for example, if your new license enables a new language).

To change the license key for a host, perform the following steps using the Admin Interface:

1. Click the Hosts icon on the left tree menu.
2. Click the name of the host for which you want to change the license key, either on the tree menu or the summary page. The Host Configuration page appears.
3. Click the Status tab. The Host Status page appears.
4. Click the License Key button. The License Key Entry page appears.
5. Enter your new license key information. For information about licensing of MarkLogic Server, contact your MarkLogic sales representative.
6. After entering valid information in the Licensee and License Key fields, click OK. If it needs to, MarkLogic will automatically restart, and the new license key will take effect.

## 2.6 Checking for the Correct Software Version

After logging in with your admin username and password, the Admin Interface appears. In the left corner of the Admin Interface, the version number and product edition are displayed.

To view more details about the release of MarkLogic Server that is installed and licensed, complete the following steps:

1. Click the Hosts icon on the left tree menu.
2. Select the name of the host you just installed, either from the left menu tree or from the Host Summary page.
3. Click the Status tab. The Host Status page appears.

4. Check that `<version>` is correct.

The screenshot shows the 'Host Status' page in the MarkLogic Admin Interface. The page title is 'Host: raymond.marklogic.com'. Below the title, there are buttons for 'license key', 'restart', and 'shutdown'. The main content area displays a list of host details:

Host	raymond.marklogic.com
Group	Default
Online	Host up since December 5, 2013 3:47:31 PM
Version	7.0-1
License Key	B081-1E63-7583-3C33-A9BB-9E11-EA07-68B9-C15E-A279-93DC-17EA-37B8-F991-3A20
Licensee	raymond
Edition	Essential Enterprise Edition
Environment	production
CPUs	2
Cores	32
Options	conversion, failover, geospatial, alerting, entity enrichment, compartment security, flexible replication, tiered storage, semantics, Spanish, English
Data Directory Available	7,239 MB
Log Space Available	7,239 MB

To begin using MarkLogic Server, see the following document:

- *Getting Started With MarkLogic Server*

Otherwise, you are finished with the Admin Interface for now. You have successfully installed MarkLogic on your system.

## 2.7 Configuring MarkLogic Server to Run as a Non-Daemon User

On UNIX-based systems (Linux), MarkLogic runs as the UNIX user named `daemon`. This section describes how to change a configuration to run as a different named UNIX user. This procedure must be run by the `root` user. Additionally, the `root` user is still required for installing and uninstalling MarkLogic and for starting and stopping MarkLogic from the startup scripts.

To modify an installation to run as a user other than `daemon`, perform the following steps:

1. In a command window on the machine in which you installed MarkLogic, log in as the `root` user.

2. Make sure MarkLogic is stopped. If it is still running, stop it as follows:

Platform	Perform the following to stop MarkLogic:
Red Hat Linux	As the <code>root</code> user, enter the following command:  <code>/sbin/service MarkLogic stop</code>

3. Edit the configuration file for your platform using a text editor such as `vi`.

Platform	Configuration File to Edit
Red Hat Linux	<code>/etc/marklogic.conf</code>

You must create the `/etc/marklogic.conf` file if it does not exist. This file is only read by the MarkLogic startup; it is never written to; therefore, it will survive an uninstallation of MarkLogic.

4. In the file, edit the `MARKLOGIC_USER` environment variable to point to the user in which you want MarkLogic Server to run. For example, if you want it to run as a user named `raymond`, change the following line:

```
MARKLOGIC_USER=daemon
```

to the following:

```
MARKLOGIC_USER=raymond
```

5. Save the changes to the `/etc/marklogic.conf` file.
6. If you have not yet started MarkLogic after performing a clean installation (that is, after installing into a directory where MarkLogic has never been installed), then you are done and you can skip the rest of the steps in this procedure. If you have an existing installation (for example, if you are upgrading to a maintenance release), then continue with the following steps.

7. For all of the MarkLogic files owned by `daemon`, you need to change the owner to the new user. This includes all forest data and all of the configuration files. By default, the forest data is in the following directories:

Platform	Default Data Directory (for configuration and log files, and default forest directory)
Red Hat Linux	<code>/var/opt/MarkLogic</code>

For example, on a Linux system, perform a command similar to the following, which changes the owner to the user specified earlier in the `/etc/sysconfig/MarkLogic` file:

```
chown -R raymond /var/opt/MarkLogic
```

8. Make sure to change the owner for all forests in the system, otherwise forests will fail to mount upon startup. Note that the above command only changes the owner for forests installed in the default directory. You need to run a similar command on the data directory for each forest in which a data directory is specified.
9. When you have completed all the file and directory ownership changes, start MarkLogic as described in “Starting MarkLogic Server” on page 21.

Once you have performed this procedure, all new files created by MarkLogic are created with the new user ownership; there will be no need to change any ownership again.

**Warning:** On Linux systems, use the `/etc/marklogic.conf` script to set environment variables. Any configuration changes you make to the MarkLogic-supplied startup script (for example, `/etc/sysconfig/MarkLogic`) will not survive an upgrade and need to be merged in during any upgrade of MarkLogic (because the installation installs a new version of the startup scripts). Under Linux, the unistallation process saves an old version of the scripts (for example, `/etc/sysconfig/MarkLogic.rpmsave`), so you can use that version to merge in your changes. If you perform a clean installation (not an upgrade installation), however, you will need to run this entire procedure again. If you use `/etc/marklogic.conf` for your environment variable changes, they will survive an upgrade and you will not need to merge your changes.

The following are default values of environment variables you can override in `/etc/marklogic.conf` on Linux-based systems (you will have to create the file if it does not exist):

```
MARKLOGIC_INSTALL_DIR=/opt/MarkLogic
MARKLOGIC_DATA_DIR=/var/opt/MarkLogic
MARKLOGIC_FSTYPE=ext4
MARKLOGIC_USER=daemon
MARKLOGIC_PID_FILE=/var/run/MarkLogic.pid
MARKLOGIC_UMASK=022
MARKLOGIC_DISABLE_JVM=0
MARKLOGIC_EC2_HOST
TZ=:/etc/localtime
```



## 2.8 Removing MarkLogic

To remove MarkLogic from your system, complete the following steps for the corresponding platform:

Platform	Perform the following:
Windows	<ol style="list-style-type: none"> <li data-bbox="428 468 1414 730">1. Stop MarkLogic: select Start &gt; Programs &gt; MarkLogic Server &gt; Stop MarkLogic Server.  <b>Note:</b> If you are using Windows Vista or Windows 7, to stop the service you must right-click the Stop MarkLogic Server link in the Start menu and choose Run as Administrator, then choose to allow the action.</li> <li data-bbox="428 762 1414 940">2. If you are uninstalling MarkLogic 9.0-4 or later, and you previously had the converters package installed, you need to uninstall it prior to uninstalling MarkLogic Server: select MarkLogic Converters in Add/Remove Programs of Control Panel, right click on it, and select Uninstall.</li> <li data-bbox="428 972 1414 1045">3. Uninstall MarkLogic: select MarkLogic Server in Add/Remove Programs of Control Panel, right click on it, and select Uninstall.</li> </ol>
Red Hat Linux	<ol style="list-style-type: none"> <li data-bbox="428 1066 1414 1171">1. Stop MarkLogic: as the <code>root</code> user, enter the following command:  <code>/sbin/service MarkLogic stop</code></li> <li data-bbox="428 1203 1414 1402">2. If you are uninstalling MarkLogic 9.0-4 or later, and you previously had the converters package installed, you need to uninstall it prior to uninstalling MarkLogic Server: as the <code>root</code> user, enter the following command:  <code>rpm -e MarkLogicConverters</code></li> <li data-bbox="428 1434 1414 1549">3. Uninstall MarkLogic: as the <code>root</code> user, enter the following command:  <code>rpm -e MarkLogic</code></li> </ol>

Platform	Perform the following:
Mac OS X	<ol style="list-style-type: none"> <li data-bbox="428 279 1414 352">1. Stop MarkLogic: select System Preferences &gt; MarkLogic to open the MarkLogic control window, and click Stop MarkLogic Server.</li> <li data-bbox="428 373 1414 604">2. If you are uninstalling MarkLogic 9.0-4 or later, and you previously had the converters package installed, you need to uninstall it prior to uninstalling MarkLogic Server, with use of the following commands: <pre data-bbox="548 516 1279 604">sudo pkgutil --forget com.marklogic.converters  rm ~/Library/MarkLogic/Converters</pre> </li> <li data-bbox="428 646 1414 783">3. No action is necessary when upgrading. If you want to remove the user data and do a fresh install, then remove the following directory: <pre data-bbox="548 747 1247 783">~/Library/Application Support/MarkLogic/Data</pre> </li> <li data-bbox="428 814 1414 1014">4. To entirely remove MarkLogic, remove the following directories: <pre data-bbox="548 884 1247 1014">~/Library/MarkLogic ~/Library/Application Support/MarkLogic ~/Library/StartupItems/MarkLogic ~/Library/PreferencePanes/MarkLogic.prefPane</pre> </li> <li data-bbox="428 1045 1414 1184">5. To make Mac OS X completely forget it ever had a MarkLogic installation, run the following command from a terminal window: <pre data-bbox="548 1146 1214 1184">sudo pkgutil --forget com.marklogic.server</pre> </li> </ol>

**Note:** Using this procedure to remove MarkLogic from your system will not remove user data (configuration information, XQuery files used by HTTP or XDBC servers, or forest content). This data is left in place to simplify the software upgrade process. If you wish to remove the user data, you must do so manually using standard operating system commands.

In case you previously used converters/filters and want to remove this functionality:

- To remove MarkLogic Converters from a node that has MarkLogic 9.0-4 or later release installed, you can use package management tool, such as Control Panel on Windows or `rpm` on Linux, to uninstall MarkLogic Converters.
- To remove converters/filters from a node that has MarkLogic 9.0-3 or earlier release installed, you need to uninstall that release of MarkLogic, and then install MarkLogic Server from release 9.0-4 or later but do not install MarkLogic Converters.

## 3.0 Technical Support

MarkLogic provides technical support according to the terms detailed in your Software License Agreement or End User License Agreement.

We invite you to visit our support website at <http://help.marklogic.com> to access information on known and fixed issues, knowledge base articles, and more. For licensed customers with an active maintenance contract, see the [Support Handbook](#) for instructions on registering support contacts and on working with the MarkLogic Technical Support team.

Complete product documentation, the latest product release downloads, and other useful information is available for all developers at <http://developer.marklogic.com>. For technical questions, we encourage you to ask your question on [Stack Overflow](#).

## 4.0 Copyright

MarkLogic Server 9.0 and supporting products.  
Last updated: April 28, 2018

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This technology is protected by U.S. Patent No. 7,127,469B2, U.S. Patent No. 7,171,404B2, U.S. Patent No. 7,756,858 B2, and U.S. Patent No 7,962,474 B2, US 8,892,599, and US 8,935,267.

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