

webMethods Universal Messaging Clustering Guide

Version 9.6

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This document applies to webMethods Universal Messaging Version 9.6 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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About this Guide

This guide describes how to configure webMethods Universal Messaging in a high-availability clustered environment. This guide is written primarily for the webMethods administrator.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.
Narrowfont	Identifies storage locations for services on webMethods Integration Server, using the convention <i>folder.subfolder:service</i> .
UPPERCASE	Identifies keyboard keys. Keys you must press simultaneously are joined with a plus sign (+).
<i>Italic</i>	Identifies variables for which you must supply values specific to your own situation or environment. Identifies new terms the first time they occur in the text.
Monospace font	Identifies text you must type or messages displayed by the system.
{ }	Indicates a set of choices from which you must choose one. Type only the information inside the curly braces. Do not type the { } symbols.
	Separates two mutually exclusive choices in a syntax line. Type one of these choices. Do not type the symbol.
[]	Indicates one or more options. Type only the information inside the square brackets. Do not type the [] symbols.
...	Indicates that you can type multiple options of the same type. Type only the information. Do not type the ellipsis (...).

Documentation Installation

You can download the product documentation using the Software AG Installer. The documentation is downloaded to a central directory named `_documentation` in the main installation directory (SoftwareAG by default).

Online Information

You can find additional information about Software AG products at the locations listed below.

If you want to...	Go to...
Access the latest version of product documentation.	Software AG Documentation website http://documentation.softwareag.com
Find information about product releases and tools that you can use to resolve problems. See the Knowledge Center to: <ul style="list-style-type: none">■ Read technical articles and papers.■ Download fixes and service packs (9.0 SP1 and earlier).■ Learn about critical alerts. See the Products area to: <ul style="list-style-type: none">■ Download products.■ Download certified samples.■ Get information about product availability.■ Access older versions of product documentation.■ Submit feature/enhancement requests.	Empower Product Support website https://empower.softwareag.com
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If you want to...	Go to...
<ul style="list-style-type: none">■ Obtain technical information, useful resources, and online discussion forums, moderated by Software AG professionals, to help you do more with Software AG technology.■ Use the online discussion forums to exchange best practices and chat with other experts.■ Expand your knowledge about product documentation, code samples, articles, online seminars, and tutorials.■ Link to external websites that discuss open standards and many web technology topics.■ See how other customers are streamlining their operations with technology from Software AG.	http:// communities.softwareag.com/

1 Overview

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What Is Universal Messaging Clustering?

Universal Messaging provides guaranteed message delivery across public, private, and wireless infrastructures.

A Universal Messaging cluster consists of Universal Messaging servers working together to provide increased scalability, availability, and reliability. An individual Universal Messaging server in the cluster is referred to as a *cluster node*. If one cluster node becomes unavailable, another cluster node takes over the messaging operations. For the clients, a cluster appears to be a single Universal Messaging server.

A Universal Messaging cluster protects your messaging system from the following failures, and provides support for business contingency and disaster recovery.

- Application and service failures
- System and hardware failures
- Site failures

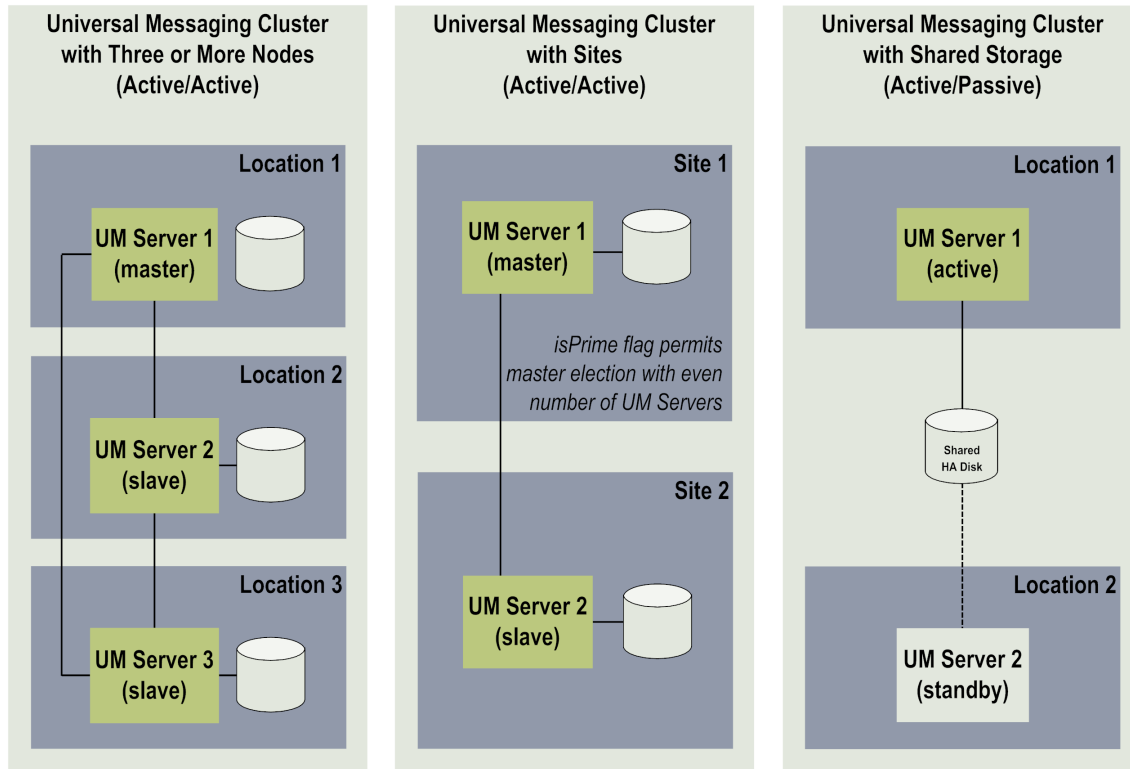
Use either Universal Messaging Enterprise Manager or the Universal Messaging administration APIs to configure and administer Universal Messaging clusters. For more information, see [Universal Messaging Documentation](#).

Approaches for Clustering

Universal Messaging supports these clustering approaches:

- **Active/active cluster**
 - Universal Messaging cluster with three or more servers
 - Universal Messaging cluster with sites
- **Active/Passive cluster**
 - Universal Messaging cluster with shared storage

The following figure provides an overview of the different approaches.



The following sections provide an overview of the Universal Messaging clustering approaches. For more information, see ["Active/Active Clustering" on page 17](#) and ["Active/Passive Clustering with Shared Storage" on page 27](#).

Active/Active Clustering

In an active/active cluster, multiple servers are active and working together to publish and subscribe messages. Universal Messaging clients automatically move from one server to another server in a cluster as required or when specific servers within the cluster become unavailable to the client for any reason. The state of all the client operations is maintained in the cluster to enable automatic failover.

To form an active/active cluster, more than 50% of the servers (a quorum) in the cluster must be active and intercommunicating. *Quorum* is the term used to describe the state of a fully formed cluster with an elected master.

Universal Messaging Cluster with Three or More Servers

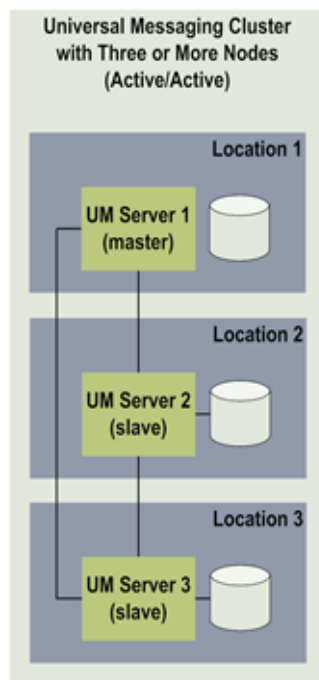
In this approach, you configure a cluster with a minimum of three servers. This approach is recommended for high availability, load balancing, and scalability.

This approach provides:

- Transparent client failover
- Transparent server failover

■ Load balancing and scalability

In the figure below, three servers are configured in three different physical locations in a cluster. Clients connected to this cluster can continue to work even if the server in one of the locations is not available. The active servers in the other two locations form the cluster if more than 50% of the servers in the cluster are available. In this example, you have only one server in each location. However, you can configure more than one sever in each location.



Universal Messaging Cluster with Sites

In this approach, you can configure just two servers to form a cluster. The quorum rule of availability of more than 50% servers in the cluster is achieved by defining the servers in two sites (primary and backup), and by allocating an additional vote (IsPrime flag) to one of these sites.

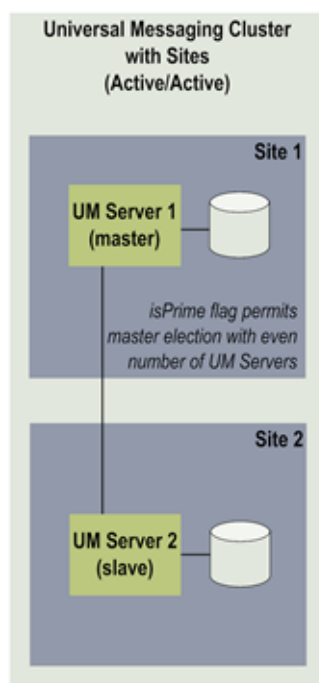
The value of the IsPrime flag in a site indicates whether the primary site or the backup site as a whole can cast an additional vote. The failover is automatic if the site where the IsPrime flag is set to false fails. If the site where the IsPrime flag is set to true fails, you need to manually set the IsPrime flag to true on the active site and perform manual failover.

This approach provides:

- Transparent client failover
- Semi-transparent server failover
- Load balancing and scalability

In the figure below, two servers are configured in just two sites: primary (master) and backup (slave). The `IsPrimeFlag` is set to true in the primary site. If the server in the backup site becomes unavailable, the cluster continues to work with the server in the primary site because the primary site has an additional vote to achieve the quorum rule of more than 50% servers available. However, if the connection to the server in the primary site is lost when the server on the backup site is active, you must manually set the `IsPrime` flag to true in the backup site so that the server in the backup site can achieve quorum, and the cluster is still working.

Even though you configure only two sites, you can define odd or even number of servers split across these sites.



Active/Passive Clustering

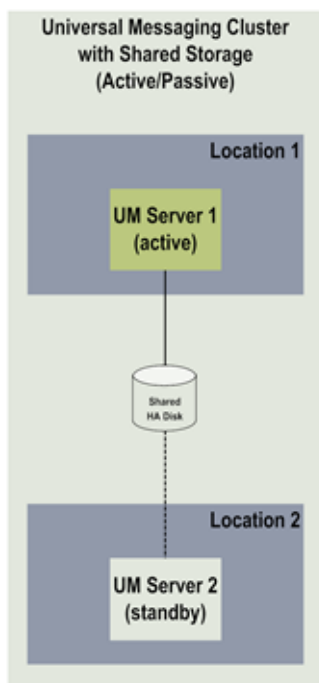
Active/passive clusters are controlled by the vendor-specific cluster control software instead of the built-in clustering feature of Universal Messaging.

Universal Messaging Cluster with Shared Storage

In this approach, an active server and an inactive server are connected to shared storage and controlling cluster software. When the active server fails, the vendor-specific cluster control software switches control to the inactive server and makes that server active. At any given time, only one of the servers is active.

The servers are set up to share a single virtual or physical disk. This approach does not provide any form of load balancing or scalability, but provides a basic mechanism for

rapid failover between servers. The administrators must perform manual or scripted failover processes.



Planning for Cluster Implementation and Deployment

A Universal Messaging cluster with three or more servers (active/active cluster) is the recommended approach for clustering. This approach supports scalability, resilience, reduces outage during failover, and uses standard (local) disks.

The table below will help you decide on the clustering approach for your Universal Messaging clustering solution.

Clustering Approach	Automatic client and server failover?	Vendor-specific cluster software required?	Shared storage required?	Minimum number of servers required?
Active/Active cluster with three or more servers	Yes	No	No Uses standard (local) disk	3

Clustering Approach	Automatic client and server failover?	Vendor-specific cluster software required?	Shared storage required?	Minimum number of servers required?
Active/Active cluster with sites Note: administrator must manually set the IsPrime flag to the other site if the site with the IsPrime flag fails.	Automatic client failover. Semi-automatic server failover.	No	No Uses standard (local) disk	2
Active/Passive cluster with shared storage	Yes	Yes	Yes	2

2 Active/Active Clustering

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About Active/Active Clustering

This section describes how to configure and administer the webMethods Universal Messaging active/active clusters by using Universal Messaging Enterprise Manager.

Applications connected to a Universal Messaging cluster can publish/subscribe to channels, or push/pop events from queues, or connect to any of the servers and view the same state. If one of the servers in the cluster is unavailable, client applications can automatically reconnect to any of the other servers in the cluster and continue to operate. This provides an exceptional ability to load balance clients between the servers.

How Does the Active/Active Cluster Work?

For an active/active cluster to work, one of the servers in the cluster must be designated as the master. The process of the master server selection involves all the servers in the cluster. Each of the servers in the cluster submits a vote and chooses the master server for the cluster. In case the master server unexpectedly exits or goes offline owing to power or network failure, the remaining active servers in the cluster elect a new master, if more than 50% of the servers are available to form the cluster.

In a Universal Messaging active/active cluster, the servers replicate resources between them, and maintain the state of the resources across all servers within the cluster. Operations such as configuration changes, transactions, and client connections go through the master server. The master server broadcasts the requests to the other servers in the cluster. This ensures that all the servers are in sync. If a server disconnects and reconnects, all the states and data are recovered from the master server.

You can connect one cluster to another cluster through remote cluster connections. Remote cluster connections enable bi-directional joins between clusters. This supports joining the resources of both the clusters for publishing and subscribing messages.

Universal Messaging Cluster with Sites

When you create a cluster with sites, you can override the quorum requirement (availability of more than 50% of the servers), and the cluster can operate with only 50% active members.

Split brain occurs when two physical locations lose connectivity with each other. In this case, both locations assume that the servers in the other location are no longer active. This situation is undesirable as two separate clusters are formed.

You can avoid a split brain situation by configuring a cluster with two sites (primary site and backup site) and setting the IsPrime flag in the primary site. In this case, the primary site with the IsPrime flag gets an extra vote. If the servers in the backup site fail, the primary site can still form the cluster because it has an extra vote. If the primary site fails, the administrator must assign the IsPrime flag to the backup site so that the backup site can get the extra vote to form the cluster.

Configuring and Administering an Active/Active Cluster

Use Universal Messaging Enterprise Manager to create, modify, and monitor clusters, channels, queues, connections, and sites.

To configure and administer an active/active cluster

1. Install Universal Messaging in the cluster nodes, and verify if Enterprise Manager can connect to the servers. For instructions, see ["Before You Create a Cluster" on page 19](#).
2. Create a cluster and add the Universal Messaging servers to the cluster. For instructions, see ["Create a Cluster" on page 20](#) and ["Modify a Cluster" on page 20](#).
3. Create cluster channels and queues as required. For instructions, see ["Create Cluster Channels" on page 21](#) and ["Create Cluster Queues" on page 21](#).
4. View and monitor cluster information. For instructions, see ["View and Monitor Cluster Information" on page 22](#).
5. Create remote cluster connections if you want to connect one cluster to another cluster. For instructions, see ["Manage Remote Cluster Connections" on page 23](#).

Before You Create a Cluster

Before you create a Universal Messaging active/active cluster, make sure you complete these tasks:

1. Install webMethods Universal Messaging in the cluster nodes by using Software AG Installer.
2. Start the Universal Messaging servers in the nodes and make sure the servers are running.
3. Verify that the permissions on the server machines allow connections to the other servers in the cluster.
4. Connect Enterprise Manager to all servers that will form the cluster. You can do this by using **Connections > Connect to Realm Cluster** and then entering the realm's URL.
5. Examine all nodes that will form the cluster, and delete the `/naming/defaultContext` channel on all but one of the nodes, preferably from empty nodes where no JNDI objects have yet been created.

The Universal Messaging JNDI provider uses a channel called `/naming/defaultContext` to store JMS references and JNDI objects. In cluster configurations, the channel should exist on only one of the nodes in the cluster. If it exists on multiple nodes, Enterprise Manage throws an error and will not allow you to create the cluster.

Note: You can migrate resources such as channels and named objects from a stand-alone server to a cluster. Software AG recommends that you delete any existing resources present on the stand-alone servers, and recreate the resources in the newly created cluster.

Create a Cluster

When you create a cluster, one of the servers in the cluster will become the master. The master server monitors the other servers and synchronizes the state of all the servers in the cluster.

1. In Enterprise Manager, right-click the **Clusters** node and select the **Create Cluster** menu option.
2. In the Create New Cluster dialog box, do the following:
 - a. Provide a name for the cluster.
 - b. From the **Available Realms** list, select the servers that you want to add to the **Cluster Members** list by either double-clicking on the server names, or by selecting the servers and clicking **Add**.

Important: When adding a new Universal Messaging server to a cluster, the shared named objects present in the newly added server will not be automatically converted to become cluster-wide objects. Recreate the affected shared named objects in the cluster.

- To remove servers from the **Cluster Members** list, either double-click on the server names, or select the servers and click **Remove**.
- c. Click **OK**.
 3. In the **Cluster Summary** tab, view the state of the cluster nodes to check which server is the current master for the cluster and if all the cluster nodes are online. You cannot create cluster channels and cluster queues if any of the cluster servers are offline.

Modify a Cluster

You can add more servers to a cluster or remove servers from a cluster. The necessary cluster resources are added or deleted as per your changes.

To modify a cluster

1. In Enterprise Manager, right-click on the name of the cluster listed under the **Clusters** node, and select the **Modify Cluster Members** menu option.
2. To add servers to the **Cluster Members** list, select the servers from the **Available Realms** list by either double-clicking on the server names, or by selecting the servers and clicking **Add**.

Important: When adding a new Universal Messaging server to an existing cluster, the shared named objects present in the newly added server will not be automatically converted to become cluster-wide objects. Recreate the affected shared named objects in the cluster.

3. To remove any server from the **Cluster Members** list, either double-click on the server name, or select the server and click **Remove**.
4. Click **OK**. When you remove a cluster member, you can choose to either:
 - Delete the cluster-wide resources from the removed servers. This option deletes only the resources created for the cluster. The locally created resources are not deleted.
 - Convert all the cluster-wide resources within the removed servers to local. This option retains the data contained within the cluster resources.

Create Cluster Channels

When you create a cluster channel, an instance of the channel will be created across all the servers within the cluster. The cluster servers maintain the same state for all the instances of a cluster channel. Hence, if an event is published to a cluster channel, that event will be available on all servers in the cluster simultaneously.

To create cluster channels

1. In Enterprise Manager, right-click on the name of the cluster listed under the **Clusters** node, and select the **Create Cluster Channel** menu option.
2. Provide the attributes for the new cluster channel.
3. Click **OK**. An instance of the newly created channel will be added to all the servers of the cluster.

Create Cluster Queues

When you create a cluster queue, an instance of the queue will be created across all the servers within the cluster. The cluster servers maintain the same state for all the instances of a queue.

To create a cluster queue

1. In Enterprise Manager, right-click on the name of the cluster listed under the **Clusters** node, and select the **Create Cluster Queue** menu option.
2. Provide the attributes for the new cluster queue.
3. Click **OK**. An instance of the newly created queue will be added to all the servers of the cluster.

View and Monitor Cluster Information

Enterprise Manager provides real-time information about the cluster members, connections, and events.

To view and monitor a cluster

1. In Enterprise Manager, right-click on the name of the cluster listed under the **Clusters** node.
2. Cluster information is organized in the following tabs. Click the appropriate tab for viewing the cluster details.

Tab	Summary
Cluster Summary	Displays the following cluster details: <ul style="list-style-type: none"> ■ Cluster member names ■ Whether a cluster member is master or slave ■ Whether a cluster member is online or offline ■ Total number of servers, channels, queues, and services ■ Total number of events consumed and published ■ Number of events consumed per second and published per second ■ Status of connections
Connections	Displays the details of cluster connections.
Remote Cluster Connections	Displays the details of remote cluster connections, if any. For information about creating and deleting remote cluster connections, see " Manage Remote Cluster Connections " on page 23.
Logfile	Displays a real-time log for the cluster activities. Provides the Start Stream option to stream the log output to a file.
Sites	Displays the site configuration details, if the sites have been configured in the cluster.

Manage Remote Cluster Connections

Clusters remotely connected together provide the ability to create joins between the channels of different clusters.

Create a Remote Cluster Connection

To create a remote cluster connection

1. In Enterprise Manager, connect to the servers of the clusters that you want to view and manage. Make sure the clusters are visible.
2. Click on the name of the cluster on which you want to create a remote connection.
3. Click the **Remote Cluster Connections** tab.
4. Click **Add**.
5. Select the cluster to which you want to create a remote connection.
6. Click **OK**.

Delete a Remote Cluster Connection

To delete a remote cluster connection

1. In Enterprise Manager, connect to the servers of the clusters that you want to view and manage. Make sure the clusters are visible.
2. Click on the name of the cluster.
3. Click the **Remote Cluster Connections** tab.
4. Select the remote cluster connection you want to delete.
5. Click **Delete**.

Delete a Cluster

When you delete a cluster, you can choose to either delete all the resources created by the clusters or convert the resources of the deleted cluster to local. When you delete a cluster, the servers that were part of the deleted cluster are not deleted.

To delete a cluster

1. In Enterprise Manager, connect to the clusters you want to view and manage.
2. Right-click on the **Clusters** node, and select the **Delete Cluster** menu option.
3. Select the cluster you want to delete.
4. Click **OK**. When you delete a cluster, you can choose to either:

- Delete all the resources of the cluster members. This option deletes only the resources created for the cluster. The locally created resources are not deleted.
- Convert all the resources of the cluster members to local. This option retains the data contained within the cluster resources.

Configuring a Cluster with Sites

Configure sites in an active/active cluster to allow the cluster to operate with as little as 50% of the cluster members.

To configure an active/active cluster with sites

1. Configure an active/active cluster. For information about creating and managing active/active clusters, see ["Configuring and Administering an Active/Active Cluster" on page 19](#).
2. Create the primary site and the backup site. For instructions, see ["Create a Site" on page 24](#).
3. Set the IsPrime flag to a site. For instructions, see ["Set the IsPrime Flag" on page 24](#).

Create a Site

Create a site and add servers to the site to logically group the nodes in the site.

To create a site

1. In Enterprise Manager, connect to the cluster where you want to create the sites.
2. Click on the name of the cluster.
3. Click the **Sites** tab.
4. Click **New** and select the members for the site.

Note that the **Sites** tab lists all servers in the cluster. To add or remove a server from a site, select or clear the check box corresponding to the server.

Set the IsPrime Flag

Use the IsPrime flag to determine which site in the cluster will contain the master server. The site with the IsPrime flag can vote for a new master when the other site fails. If the site with the IsPrime flag fails, the administrator must set the IsPrime flag on the other site to permit that site to elect the new master.

To set the IsPrime Flag to a site

1. In Enterprise Manager, connect to the cluster with sites.

2. Click on the name of the cluster with sites.
3. Click the **Sites** tab.
4. Select the **IsPrime** flag for the site you want to set and confirm the flag setting.

Delete a Site

When you delete a site, the logical grouping of the nodes in the site is removed. The servers grouped in the site are not deleted when you delete a site.

To delete a site

1. In Enterprise Manager, connect to the cluster with sites.
2. Click on the name of the cluster.
3. Click the **Sites** tab.
4. Select the site you want to delete.
5. Click **Delete** and select the sites you want to delete.

3 Active/Passive Clustering with Shared Storage

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About Active/Passive Clustering

Active/passive clustering is a solution that uses clustering software and special purpose hardware to minimize system downtime. Active/passive clusters are groups of computing resources that are implemented to provide high availability of software and hardware computing services. Active/passive clusters operate by having redundant groups of resources (such as CPU, disk storage, network connections, and software applications) that provide service when the primary system resources fail.

In a high availability active/passive clustered environment, one of the nodes in the cluster will be active and the other nodes will be inactive. When the active node fails, the cluster fails over to one of the inactive nodes automatically. As a part of this failover process, clustering software will start the resources on the redundant node in a predefined order (or resource dependency) to ensure that the entire node comes up properly.

webMethods Universal Messaging can run in an active/passive cluster environment, under Windows or UNIX. This approach does not provide load balancing or scalability.

Active/Passive Clustering Requirements

You need the following to configure a webMethods Universal Messaging active/passive cluster.

- Cluster control software to manage the clusters on Windows or UNIX.
- Shared Storage for sharing data files.
- IP address for executing the Universal Messaging cluster service.
- webMethods Universal Messaging installed on the cluster nodes in the same directory path (for example, C:\SoftwareAG_UM). In the installations, the data directory path for the shared storage must be the same.

Important: Universal Messaging installation must be identical on all cluster nodes. All instances of Universal Messaging must point to the same Universal Messaging storage files on the shared storage.

Universal Messaging Capabilities for Active/Passive Clustering

The following capabilities of Universal Messaging enable the vendor-specific cluster control software to monitor and manage Universal Messaging in an active/passive cluster.

- Functionality to start, stop, and monitor the servers.
- Ability to store the server's state information and data on a shared disk.

- Ability to survive a crash and restart itself in a known state.
- Ability to meet license requirements and host name dependencies.

Virtual IP Address of an Active/Passive Cluster

A virtual IP address is like any other IP address except it does not have a specific host or node to resolve to. It resolves at run time to a server wherever the IP is physically bound and reachable on the network.

For client applications to access the services in an active/passive cluster in a transparent way, the virtual IP address of the cluster must be supplied to the client applications. This virtual IP address is usually referred to as the "logical host." This logical host identity is a network address (or host name) and is not tied to a single cluster server.

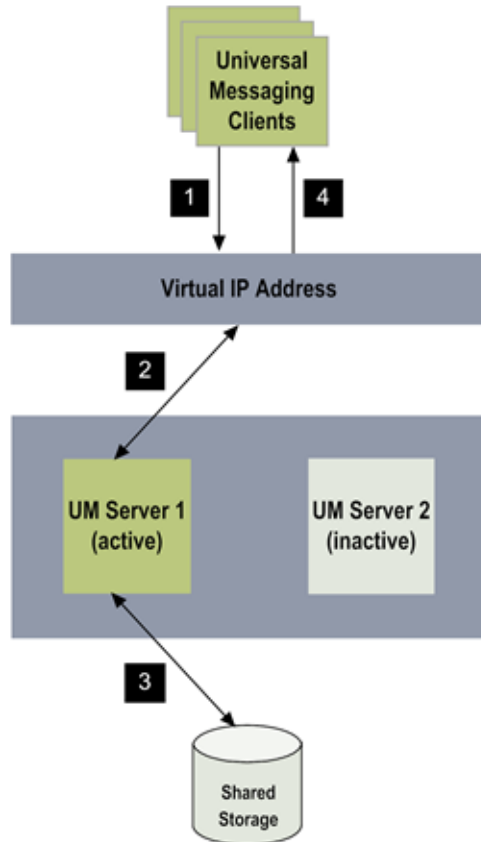
When there is a failover, the cluster control software will resolve the virtual IP address to the physical IP address of the current active server in the cluster. The client application is not affected in any way other than experiencing a brief outage of the services.

Failover Mechanism in an Active/Passive Cluster

webMethods Universal Messaging runs as a service in a cluster. Within an active/passive cluster, there can be only a single instance of Universal Messaging server running at any given time. The spare Universal Messaging server is inactive.

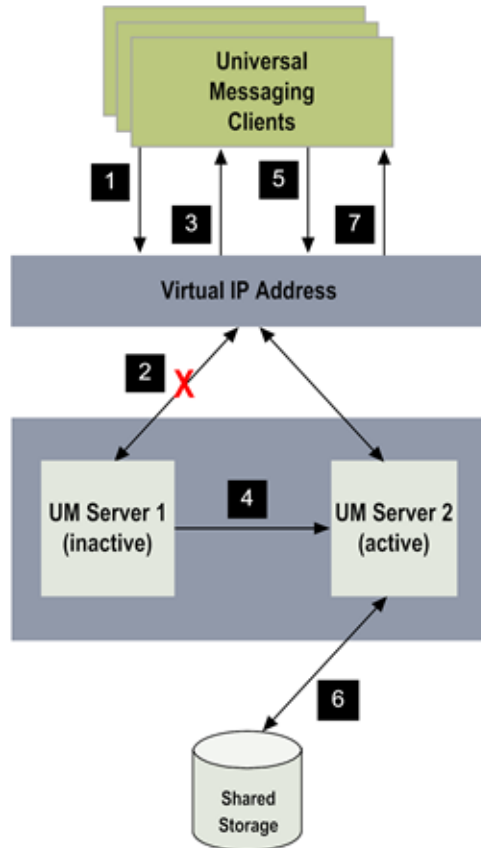
In a clustered environment, when a client makes a request to a server, the server handles the request much the same as in an unclustered environment, except that the server writes the client information to a shared disk instead of a private data store.

The diagram below illustrates the flow of documents through a typical clustered environment.



Steps	Description
1	Universal Messaging clients use the virtual IP address of the cluster to connect to the active/passive Universal Messaging cluster.
2	Cluster control software forwards the client request to the active server in the cluster.
3	The active server reads data from or writes data to the shared storage.
4	Universal Messaging returns the results to the client application.

The diagram below illustrates the failover in a clustered environment. If a server fails, subsequent requests for the session are redirected to a spare server in the cluster that is currently active and running.



Steps	Description
1	Universal Messaging clients use the virtual IP address of the cluster to connect to the active/passive Universal Messaging cluster.
2	The active server experiences failure and shuts down.
3	The cluster software returns the error code to the client.
4	Cluster control software marks the spare server as active.
5	Cluster control software forwards the client request to the active server in the cluster.
6	The active server reads data from or writes data to the shared storage.
7	Universal Messaging returns the results to the client application.

Cluster Verification

A cluster installation consultant will typically perform the cluster installation for you; however, verify the following to make sure that the cluster is installed properly:

- The shared drive can be accessed from the cluster nodes.
- The virtual IP address of the cluster is accessible on the public network.
- Only one Universal Messaging server instance in the cluster can access the shared drive at any given time.

Roles and Responsibilities for Configuring an Active/Passive Cluster

Configuring Universal Messaging in a high-availability cluster requires the efforts of the following people:

- System administrator
- Cluster vendor's installation consultant
- webMethods Universal Messaging administrator

Role	Responsibilities
System administrator	Perform system and network administration tasks.
Cluster vendor's installation consultant	Install cluster hardware and software (for example, Windows Server, Veritas, HP ServiceGuard, IBM HACMP, or Oracle Solaris Cluster) installation.
webMethods Universal Messaging administrator	Install Universal Messaging and HA scripts.

Overview of Active/Passive Clustering on Windows

This section describes how to configure webMethods Universal Messaging with shared storage on Windows Server 2008 R2 and Windows Server 2012 R2.

How Does webMethods Universal Messaging Run in a Windows Cluster?

In a Windows cluster environment, Universal Messaging runs as a service or as an application defined within a Windows cluster group. You use the Failover Cluster Manager to configure and monitor the Universal Messaging servers and all the

associated resources. For more information about the settings in Failover Cluster Manager, see the Microsoft Windows Failover Cluster Manager manuals.

Summary of Active/Passive Cluster Configuration on Windows Server

Perform the following steps to configure Universal Messaging for high availability.

To configure Universal Messaging for high availability

1. Read through this guide to gain a better understanding of the installation and configuration process before starting the installation steps.
2. Mount the shared drive and add the shared drive to the cluster. For instructions, see ["Mount and Configure the Shared Drive" on page 33](#).
3. Install webMethods Universal Messaging on the cluster nodes. For instructions, see ["Install webMethods Universal Messaging on Cluster Nodes" on page 34](#).
4. Make sure that your administrator has properly installed and configured the cluster. For information, see ["Cluster Verification" on page 32](#).
5. Create the Universal Messaging cluster group. Define all the resources and dependencies required to run webMethods Universal Messaging. For instructions, see:
 - a. ["Create the Universal Messaging Cluster" on page 35](#).
 - b. ["Configure Universal Messaging as a Clustered Service" on page 36](#).
 - c. ["Customize Universal Messaging Startup Behavior" on page 36](#).
6. Make sure that the installation and configuration enables the Universal Messaging server to fail over correctly from one cluster node to the other. For instructions, see ["Verify Failover in the Cluster" on page 37](#).

Configuring a webMethods Universal Messaging Active/Passive Cluster on Windows Server

Mount and Configure the Shared Drive

Before you create the Universal Messaging cluster and add the shared drive to the cluster, you must mount the shared drive. One way to mount the shared drive is by using the Microsoft iSCSI Initiator.

To mount the shared drive using the iSCSI Initiator

1. From the Windows Start menu, navigate to **Administrative Tools > iSCSI Initiator** in the control panel.

2. Click the **Discovery** tab.
3. In the Target portals panel, click **Discover Portal**.
4. Type the IP address and port of the shared drive and click **OK**.
5. Click the **Targets** tab.

The discovered targets are listed in the **Discovered Targets** list box with the status.

6. If the shared drive is not connected, select the name of the drive and click **Connect**.

The shared drive, if discovered, is recognized and connected to the machine.

7. Click the **Volumes and Devices** tab.

The available volumes and devices are displayed in the **Volume List** list box. If a program or service uses a specific volume or device and it is not included in this list, you need to add it.

8. Click **Auto Configure**.

This step automatically configures all the listed volumes and devices, and binds them so that, after restarting the system, they are more readily available for use by the program or service.

9. Click **OK**.

10. Restart the machine.

You are now ready to create and configure the Universal Messaging cluster.

Install webMethods Universal Messaging on Cluster Nodes

Use Software AG Installer to install the webMethods Universal Messaging software on each node in the cluster. For complete installation procedures, see *Installing webMethods and Intelligent Business Operations Products*.

To install webMethods Universal Messaging on cluster nodes

1. Log on as administrator to each of the cluster node machines.

Note: If you cannot log on, check if the machines are running. If necessary, power on the disks and the machines, and boot the operating system.

2. Install webMethods Universal Messaging on the cluster nodes in the same directory (for example, C:\SoftwareAG_UM).
3. Make sure the data directory path for the shared storage is the same in all installations. The data directory path in the nserver.conf and nserverdaemon.conf configurations files must correctly refer to the same shared storage path. For example, the data directory path in all the nodes is specified as
`wrapper.java.additional.4="-DDATADIR=H:\UMSharedStorage\Data"`

If the data directory path for the shared storage is not the same in all the nodes, edit and correct the `nserver.conf` file and `nserverdaemon.conf` file on the nodes.

Create the Universal Messaging Cluster

Use the Failover Cluster Manager to create a Universal Messaging cluster in Windows Server.

To create a Universal Messaging cluster in Windows Server 2008 R2 or Windows Server 2012 R2

1. Open the Failover Cluster Management console.
2. Right-click **Failover Cluster Manager** and select **Create a Cluster**. The **Create Cluster Wizard** appears.
3. In the **Before You Begin** page, click **Next**.
4. In the **Select Servers** page, browse to select all the servers (cluster nodes) or enter the names of the servers, and click **Add**.
5. Click **Next**.
6. In the **Validation Warning** page, select **Yes** to run the **Validate a Configuration** wizard.

Software AG recommends that you run the validation tests to determine whether the configuration of servers and attached storage is set up correctly to support failover.

- a. In the **Validate a Configuration** wizard, click **Next** in the **Before You Begin** page.
- b. In the **Testing Options** page, select **Run all tests** or **Run only tests I select** depending on whether you want to run all or only selected configuration validation tests.
- c. In the **Confirmation** page, click **OK** to run the test cases.

In the **Validating** page, the wizard runs the listed test cases and displays the result for each test case. If any hardware issues are indicated, contact your system administrator or software vendor.

When the test cases have completed, the **Summary** page appears, showing the cluster name, node details, quorum, and IP Address.

- d. Click **View report** to view the detailed report or click **Finish** to complete the validation.

If you notice any issues, resolve the issues, and run the **Validate a Configuration** wizard again until all tests are successful.

7. In the **Access Point for Administering the Cluster** page, enter the cluster name and click **Next**.

Note: If you get a permission exception for Active Directory, contact your system administrator.

The **Confirmation** page displays the cluster nodes and IP address details.

8. Click **Next** to confirm.

The **Creating New Cluster** page displays the summary of the new cluster.

9. Choose to view the detailed report or click **Finish**.

Note: When you create the cluster, the shared directory is automatically listed in **Storage > Available Storage** in the Failover Cluster Manager.

You have configured the cluster nodes in the Universal Messaging cluster.

Configure Universal Messaging as a Clustered Service

You can run Universal Messaging as a service or an application. Use the Failover Cluster Manager to add Universal Messaging to the cluster.

To configure Universal Messaging as a clustered service

1. Open the Failover Cluster Management console.
2. Right-click the **Services and Applications** icon and select **Configure a service or application**.
3. In the High Availability wizard, in the **Before You Begin** page, click **Next**.
4. If you want to run Universal Messaging as a service in the cluster, select **Generic Service**, or if you want to run Universal Messaging as an application, select **Generic Application**, and click **Next**.
5. Provide the cluster service name on Client Access Point page.
6. In the **Select Storage** page, select the storage option and click **Next**.
7. In the **Replicate Registry Settings** page, click **Next**.
8. In the **Confirmation** page, click **Next**.
9. Click **Finish**.

Customize Universal Messaging Startup Behavior

Use the Failover Cluster Manager to configure the number of attempts for starting the Universal Messaging server. This is a one-time activity.

To configure the number of times a failed Universal Messaging server should be restarted

1. Open the Failover Cluster Management console.
2. Right-click the service name and select **Properties**.
3. Click the **Failover** tab. You can configure:
 - Whether a failing server will be restarted.
 - The number of restart attempts to be allowed within a given period.

- The rate at which the service will be polled.
- Whether the core cluster resource will automatically fail over to the most preferred owner.

Verify Failover in the Cluster

Use the Failover Cluster Manager to verify failover in the cluster.

Note: Ask the system administrator to verify failover when there is a hardware failure.

To verify failover in the cluster

1. Open the Failover Cluster Management console.
2. Make sure the Universal Messaging server node is online.
3. Right-click the Universal Messaging cluster service name, select **Move this service or application to another node**, and click **Move to Node *node2_name***.
4. In the **Please confirm action** dialog box, click **Move service_name to node2_name**.
5. Confirm that the service is stopped on the first node and is running on *node2_name*. All the resources defined in the Universal Messaging cluster should go offline, indicating that the resource dependencies are correctly defined.

It may take several seconds for all of the resources to go offline and for the resource states in the Failover Cluster Manager window to be updated.
6. Right-click each resource and select **Bring Online** to bring each resource back online.

Overview of Active/Passive Clustering on UNIX

This section describes how to configure webMethods Universal Messaging with shared storage on UNIX.

Cluster Monitoring Scripts

The cluster control software determines the health of the servers by periodically probing the servers using the monitor scripts. When the cluster control software determines that one of the servers in the cluster has failed, it will shut down that server and start the server on the spare node.

You must incorporate the UNIX shell scripts for starting, stopping, and monitoring the servers in the cluster control software's infrastructure. You might have to customize code to enable the cluster control software to invoke these UNIX shell scripts.

Summary of Active/Passive Cluster Configuration on UNIX

This section is written primarily for the webMethods Universal Messaging administrator to gain a better understanding of the configuration process.

To configure Universal Messaging in an active/passive cluster

1. Ask the cluster vendor's installation consultant to perform these tasks:
 - a. Install the HA cluster environment.
 - b. Configure the HA cluster environment including the shared disk storage.
2. Ask the system administrator to perform these tasks:
 - a. Administer the HA cluster environment so it is ready for software installation.
 - b. Configure the external network connection to the HA cluster and create the virtual host (virtual IP address) for the HA cluster.
3. Ask the cluster vendor's installation consultant and the system administrator to test the basic HA installation to ensure it functions properly.
4. Install and configure webMethods Universal Messaging on the cluster nodes with the help of the cluster vendor's installation consultant.

For information about how to install the cluster nodes and configure the cluster, see ["Configuring a webMethods Universal Messaging Active/Passive Cluster on UNIX" on page 38](#).

5. Verify that Universal Messaging runs on the cluster node. For instructions, see ["Verify the Universal Messaging Server Installation" on page 39](#).
6. Make sure the cluster is installed properly and configured. For information, see ["Cluster Verification" on page 32](#).
7. Configure and test the scripts according to the cluster vendor's specification for starting, stopping, and monitoring the Universal Messaging servers. For instructions, see ["Configure the Start, Stop, and Status Scripts" on page 39](#).
8. Verify failover in the cluster. For instructions, see ["Verify Failover in the Cluster" on page 40](#).

Configuring a webMethods Universal Messaging Active/Passive Cluster on UNIX

Install webMethods Universal Messaging on Cluster Nodes

When you install Universal Messaging on cluster nodes, you must:

- Follow the instructions in *Installing webMethods and Intelligent Business Operations Products*.
- Work with the cluster vendor's installation consultant to prepare the cluster node to respond to the virtual IP address and have access to the storage files on the shared storage.

To install Universal Messaging on cluster nodes

1. Install Universal Messaging on the first cluster node and configure to use the shared storage.
2. Unmount the shared storage from cluster node 1 and mount it on cluster node 2.
3. Make the first cluster node inactive.
4. Install Universal Messaging on the second cluster node and configure it to use the shared storage.
5. Make the second cluster node active so that it will respond to the virtual IP address and have access to the storage files on the shared storage.

Verify the Universal Messaging Server Installation

Use the Universal Messaging Enterprise Manager to verify that the Universal Messaging server is properly installed and working.

To verify that the servers are installed properly

1. Start the Enterprise Manager.
2. Connect to the servers that are part of the cluster.
3. Verify the status of the servers in the cluster.

Configure the Start, Stop, and Status Scripts

Incorporate the scripts of each cluster node into the cluster control software with the help of the cluster vendor's installation consultant.

To configure the start, stop, and status scripts of a server

1. Provide the location of the start and stop scripts to the cluster vendor consultant.
The scripts to start and stop a Universal Messaging server are located here:
 - `universal_messaging_install_directory/links/Start Servers/Start Universal Messaging Realm Server version/Start server_name`
 - `universal_messaging_install_directory/links/Stop Servers/Stop Universal Messaging Realm Server version/Stop server_name`
2. Implement a status script using the Universal Messaging API and provide the script to the cluster vendor consultant. For example, to return the server time

stamp, you can use: `universal_messaging_install_directory/nirvana/java/server_name/bin/ngetservertime`

- a. Modify `env.sh` and change last command from “\$SHELL” to “\$SHELL \$*”.
- b. Run this command to monitor the server status:

```
./env.sh -c "ngetservertime" | grep "Server Time"
```

Verify Failover in the Cluster

Test the entire cluster with an application to make sure that the cluster functions properly. With the help of the system administrator and the cluster vendor’s installation consultant, you can verify the cluster configuration and installation by causing a failover.

To verify failover in a cluster

1. In the Enterprise Manager, provide the virtual IP address of the cluster to connect to the server and view the status.
2. Shut down the server on cluster node 1.
3. Start the server on cluster node 2 or let the cluster software start the server on cluster node 2.
4. Verify the status of the servers.