Perforce Helix Server Deployment Package (for UNIX/Linux)

Perforce Professional Services

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Preface

The Server Deployment Package (SDP) is the implementation of Perforce's recommendations for operating and managing a production Perforce Helix Core Version Control System. It is intended to provide the Helix Core administration team with tools to help:

- Simplify Management
- High Availability (HA)
- Disaster Recovery (DR)
- Fast and Safe Upgrades
- Production Focus
- Best Practice Configurables
- Optimal Performance, Data Safety, and Simplified Backup

This guide is intended to provide instructions of setting up the SDP to help provide users of Helix Core with the above benefits.

This guide assumes some familiarity with Perforce and does not duplicate the basic information in the Perforce user documentation. This document only relates to the Server Deployment Package (SDP). All other Helix Core documentation can be found here: Perforce Support Documentation.

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Perforce welcomes feedback from our users. Please send any suggestions for improving this document or the SDP to consulting@perforce.com.

Chapter 1. Overview

The SDP has four main components:

- Hardware and storage layout recommendations for Perforce.
- Scripts to automate critical maintenance activities
- Scripts to aid the setup and management of replication (including failover for DR/HA)
- Scripts to assist with routine administration tasks.

Each of these components is covered, in detail, in this guide.

1.1. Using this Guide

Chapter 2, *Setting up the SDP* describes concepts and re-requisites

Chapter 3, *Installing the SDP on Unix / Linux* consists of what you need to know to setup Helix Core sever on a Unix platform.

Chapter 4, *Backup, Replication, and Recovery* gives information around the Backup, Restoration and Replication of Helix Core, including some guidance on planning for HA (High Availability) and DR (Disaster Recovery)

Chapter 5, *Upgrades* covers upgrades of `p4d` and related Helix Core executables.

Section 5.3, "Upgrading the SDP" covers upgrading the SDP itself.

Chapter 7, *Maximizing Server Performance* covers optimizations and proactive actions.

Chapter 8, *Tools and Scripts* covers all the scripts used within the SDP in detail.

Appendix A, *SDP Package Contents and Planning* describes the details of the SDP package.

Appendix B, *The journalPrefix Standard* describes the standard for setting the `journalPrefix` configurable.

Appendix C, *Server Spec Naming Standard* describes the standard for naming 'server' specs created with the `p4 server` command.

Appendix D, *Frequently Asked Questions/Troubleshooting* is useful for other questions.

Appendix E, *Starting and Stopping Services* gives on overview of starting and stopping services with common init mechanisms, `systemd` and SysV.

1.2. Getting the SDP

The SDP is downloaded as a single zipped tar file the latest version can be found at: https://swarm.workshop.perforce.com/projects/perforce-software-sdp/files/downloads

The file to download containing the latest SDP is consistently named `sdp.Unix.tgz`. A copy of this file

also exists with a version-identifying name, e.g. `sdp.Unix.2019.3.26571.tgz`.

The direct download link to use with `curl` or `wget` is illsustated with this command:

```
curl -k -O https://swarm.workshop.perforce.com/projects/perforce-software-
sdp/download/downloads/sdp.Unix.tgz
```

Chapter 2. Setting up the SDP

This section tells you how to configure the SDP to setup a new Helix Core server.

The SDP can be installed on multiple server machines, and each server machine can host one or more Helix Core server instances.

The SDP implements a standard logical directory structure which can be implemented fleixbly on one or many physical server machines.

Additional relevant information is available in the System Administrator Guide.

2.1. Terminology and pre-requisites

1. The term *server* refers to a Helix Core server *instance*, unless otherwise specified.
2. The term *metadata* refers to the Helix Core database files.
3. *Instance:* a separate Helix Core instantiation, with its own data set, set of users, files and changelists managed by a p4d service.

Pre-Requisites:

1. The Helix Core binaries (p4d, p4, p4broker, p4p) have been downloaded (see Chapter 3, *Installing the SDP on Unix / Linux*)
2. *sudo* access is required
3. System administrator available for configuration of drives / volumes (especially if on network or SAN or similar)
4. Supported Linux version, currently these versions are fully supported - for other versions please speak with Perforce Support.
   - Ubuntu 18.04 LTS (bionic)
   - Ubuntu 20.04 LTS (focal fossa)
   - CentOS or Red Hat (RHEL) 7.x
   - CentOS or Red Hat (RHEL) 8.x
   - SUSE Linux Enterprise Server 12

We have seen CentOS/RHEL perform noticably better than Ubuntu with the same storage (e.g. All Flash arrays, and SAN drives) - and thus recommend it.

2.2. Volume Layout and Hardware

As can be expected from a version control system, good disk (storage) management is key to maximising data integrity and performance. Perforce recommend using multiple physical volumes for **each** server instance. Using three or four volumes per instance reduces the chance of hardware failure affecting more than one instance. When naming volumes and directories the SDP assumes the "hx" prefix is used to indicate Helix volumes (your own naming conventions/standards can be

used instead). For optimal performance on UNIX machines, the XFS file system is recommended but not mandated.

- **Depot data, archive files, scripts, and checkpoints**: Use a large volume, with RAID 6 on its own controller with a standard amount of cache or a SAN or NAS volume (NFS access is fine).

This volume is the only volume that **must** be backed up. The SDP backup scripts place the metadata snapshots on this volume.

+ This volume is normally called `/hxdepots`.

- **Perforce metadata (database files), 1 or 2 volumes:** Use the fastest volume possible, ideally SSD or RAID 1+0 on a dedicated controller with the maximum cache available on it. Typically a single volume is used, `/hxmetadata`. In some sites with exceptionally large metadata, 2 volumes are used for metadata, `/hxmetadata` and `/hxmetadata2`

Do not run anti-virus tools or back up tools against the `hxmetadata` volume(s) or `hxlogs` volume(s), because they can interfere with the operation of the Perforce server.

- **Journals and logs:** a fast volume, ideally SSD or RAID 1+0 on its own controller with the standard amount of cache on it. This volume is normally called `/hxlogs` and can optionally be backed up.

  If a separate logs volume is not available, put the logs on the `/hxmetadata` or `/hxmetadata1` volume, as metdata and logs have similar performance needs that differ from `/hxdepots`.

Storing metadata and logs on the same volume is discouraged, since the redundancy benefit of the P4JOURNAL (stored on `/hxlogs`) is greatly reduced if P4JOURNAL is on the same volume as the metadata in the P4ROOT directory.

If multiple controllers are not available, put the `/hxlogs` and `/hxdepots` volumes on the same controller.

The SDP will create a "convenience" directory containing links to the volumes for each instance named `/p4`. The volume layout is shown in Appendix A, *SDP Package Contents and Planning*. This convenience directory enables easy access to the different parts of the file system for each instance.

For example:

- `/p4/1/root` contains the database files for instance `1`
- `/p4/1/logs` contains the log files for instance `1`
- `/p4/1/bin` contains the binaries and scripts for instance `1`
- `/p4/common/bin` contains the binaries and scripts common to all instances

Chapter 3. Installing the SDP on Unix / Linux

3.1. Automated Install

If you are doing a "green field" install, a first-time installation on a new machine that does not yet have any Perforce Helix data, then the Helix Installer should be used.

3.2. Manual Install

The following documentation covers internal details of how the SDP can be deployed manually. Many of the steps below are performed by the Helix Installer.

To install Perforce Server and the SDP, perform the steps laid out below:

- Set up a user account, file system, and configuration scripts.
- Run the configuration script.
- Start the server and configure the required file structure for the SDP.

1. If it doesn't already exist, create a group called `perforce`:

   ```
   sudo groupadd perforce
   ```

2. Create a user called perforce and set the user's home directory to `/p4` on a local disk.

   ```
   sudo useradd -d /p4 -s /bin/bash -m perforce -g perforce
   ```

3. Allow the perforce user sudo access

   ```
   sudo echo "perforce ALL=(ALL) NOPASSWD:ALL" > /etc/sudoers.d/perforce
   ```

4. Create or mount the server file system volumes (per layout in previous section)

   - `/hxdepots`
   - `/hxlogs`

   and either:

   - `/hxmetadata`

   or

   - `/hxmetadata1`
   - `/hxmetadata2`

5. These directories should be owned by: `perforce:perforce`

```
sudo chown -R perforce:perforce /hx*
```

6. (Optional) if you have different root directories, or are putting all files into one mounted filesystem (only recommended for small repositories), then do something like the following:

   Option 1, all under a single directory `/data`:

   ```
   cd /data
   mkdir hxmetadata hxlogs hxdepots
   sudo chown -R perforce:perforce /data/hx*
   cd /
   ln -s /data/hx* .
   sudo chown -h perforce:perforce /hx*
   ```

   Option 2, different mounted root folders, e.g. `/P4metadata`, `/P4logs`, `/P4depots`:

   ```
   sudo chown -R perforce:perforce /P4metadata /P4logs /P4depots
   cd /
   ln -s /P4Medata hxmetadata
   ln -s /P4logs hxlogs
   ln -s /P4depots hxdepots
   sudo chown -h perforce:perforce /hx*
   ```

7. Extract the SDP tarball.

   ```
   cd /hxdepots
   tar -xzf /WhereYouDownloaded/sdp.Unix.tgz
   ```

8. Set environment variable SDP.

   ```
   export SDP=/hxdepots/sdp
   ```

9. Make the entire $SDP (`/hxdepot/sdp`) directory writable:

   ```
   chmod -R +w $SDP
   ```

10. Download the appropriate p4, p4d and p4broker binaries for your release and platform:

    ```
    cd /hxdepots/sdp/helix_binaries
    ./get_helix_binaries.sh
    ```

    If you want to ensure a particular release:

```
cd /hxdepots/sdp/helix_binaries
./get_helix_binaries.sh r20.2
```

3.2.1. Manual Install Initial setup

The next steps highlight the setup and configuration of a new Helix Core instance using the `mkdirs.sh` script included in the SDP.

Usage

```
USAGE for mkdirs.sh v4.5.0:

mkdirs.sh <instance> [-s <ServerID>] [-t <server_type>] [-I <svc>[,<svc2>]] [-MDD
/bigdisk] [-MLG /jnl] [-MDB1 /db1] [-MDB2 /db2] [-f] [-p] [-test [-clean]] [-n] [-L
<log>] [-d|-D]

or

mkdirs.sh [-h|-man]


DESCRIPTION:

This script initializes an SDP instance on a single machine.

This script is intended to support two scenarios:

* First time SDP installation on a given machine.
* Adding new SDP instances (separate Helix Core data sets) to an existing
  SDP installation on a given machine.

And SDP instance is a single Helix Core data set, with its own unique
set of one set of users, changelist numbers, jobs, labels, versioned
files, etc. An organization may run a single instance or multiple
instances.

This is intended to be run either as root or as the operating system
user account (OSUSER) that p4d is configured to run as, typically
'perforce'.  It should be run as root for the initial install.
Subsequent additions of new instances do not require root.

If an initial install as done by a user other than root, various
directories must exist and be writable and owned by 'perforce' before starting:

* /p4
* /hxdepots
* /hxlogs
* /hxmetadata
```

```
This script creates an init script in the /p4/N/bin directory.

After running this script, set up the crontab based on templates
generated in /p4/common/etc/cron.d.  For convenience, a sample cronat
is generated for the current machine in /p4/common/etc/cron.d named

crontab.<osuser>.<host>

where <osuser> is the user that services run as (typically 'perforce'),
and <host> is the short hostname (as returned by a 'hostname -s' command).


Next, put the license file in place in the P4ROOT dir, and launch the server
with the init script.

Then run /p4/common/bin/p4master_run instance /p4/common/bin/live_checkpoint.sh
and then run both the daily_checkpoint.sh and recreate_db_checkpoint.sh to
make sure everything is working before setting up the crontab.

Also run /p4/common/bin/p4master_run <instance> /p4/common/bin/p4review.py <instance>
to make sure the review script is working properly.  If you intend to use
Swarm, you can skip configuration of the review daemon, and instead configure
Swarm to handle review-style email notifications.

REQUIRED PARAMETERS:
 <instance>
    Specify the SDP instance name to add.  This is a reference to the Perforce
    Helix Core data set.

OPTIONS:
 -s <ServerID>
    Specify the ServerID, overriding the REPLICA_ID setting in the configuration
    file.

 -S <TargetServerID>
    Specify the ServerID of the P4TARGET of the server being installed.
    Use this when setting up an edge server.

 -t <server_type>
    Specify the server type, overriding the SERVER_TYPE setting in the config
    file.  Valid values are:
    * p4d_master - A master/commit server.
    * p4d_replica - A replica with all metadata from the master (not
      filtered in any way).
    * p4d_filtered_replica - A filtered replica or filtered forwarding
      replica.
    * p4d_edge - An edge server.
    * p4d_edge_replica - Replica of an edge server. If used,
      '-S <TargetServerID>' is required.
    * p4broker - An SDP host running only a broker, with no p4d.
    * p4proxy - An SDP host running a proxy (maybe with a broker in front),
```

```
      with no p4d.

 -I [<svc>[,<svc2>]]
    Specify additional init scripts to be added to /p4/<instance>/bin
    for the instance.

    By default, the p4p service is installed only if '-t p4proxy' is
    specified, and p4dtg is never installed by default.  Valid values
    to specify are 'p4p' and 'dtg' (for the P4DTG init script).

    If services are not installed by default, they can be added later
    using templates in /p4/common/etc/init.d. Also, templates for
    systemd service files are supplied in /p4/common/etc/systemd/system.

 -MDD /bigdisk
 -MLG /jnl
 -MDB1 /db1
 -MDB2 /db2
    Specify the '-M*' to specify mount points, overriding DD/LG/DB1/DB2
    settings in the config file.  Sample:

    -MDD /bigdisk -MLG /jnl -MDB1 /fast

    If -MDB2 is not specified, it is set the the same value as -MDB1 if
    that is set, or else it defaults to the same default value as DB1.

 -f Specify -f 'fast mode' to skip chown/chmod commands on depot files.
    This should only be used when you are certain the ownership and
    permissions are correct, and if you have large amounts of existing
    data for which the chown/chmod of the directory tree would be
    slow.

 -p Specify '-p' to halt processing after preflight checks are complete,
    and before actual processing starts. By default, procesing starts
    immediately upon successful completion of preflight checks.

 -L <log>
    Specify the path to a log file, or the special value 'off' to disable
    logging.  By default, all output (stdout and stderr) goes to this file
    in the current directory:

    mkdirs.<instance>.<datestamp>.log

    NOTE: This script is self-logging.  That is, output displayed on the
    screen is simultaneously captured in the log file.  Do not run this
    script with redirection operators like '> log' or '2>&1', and do not
    use 'tee'.

DEBUGGING OPTIONS:
 -test
    Specify '-test' to execute a simulated install to /tmp/p4 as the install
```

```
    root (rather than /p4), and with the mount point directories specifed in
    the configuration file prefixed with /tmp/hxmounts, defaulting to:
    * /tmp/hxmounts/hxdepots
    * /tmp/hxmounts/hxlogs
    * /tmp/hxmounts/hxmetadata

 -clean
    Specify '-clean' with '-test' to clean up from prior test installs,
    which will result in removal of files/folders installed under /tmp/hxmounts
    and /tmp/p4.

    Do not specify '-clean' if you want to test a series of installs.

 -n No-Op.  In No-Op mode, no actions that affect data or structures are
    taken.  Instead, commands that would be run are displayed.  This is
    an alternative to -test. Unlike '-p' which stops after the preflight
    checks, with '-n' more processing logic can be exercised, with greater
    detail about what commands that would be executed without '-n'.

 -d     Increase verbosity for debugging.

 -D     Set extreme debugging verbosity, using bash '-x' mode. Also implies -d.

HELP OPTIONS:
 -h Display short help message
 -man   Display man-style help message

FILES:
    The mkdirs.sh script uses a configuration file for many settings.  A
    sample file, mkdirs.cfg, is included with the SDP.  After determining
    your SDP instance name (e.g. '1' or 'abc'), create a configuration
    file for it named mkdirs.<N>.cfg, replacing 'N' with your instance.

    Running 'mkdirs.sh N' will load configuration settings from mkdirs.N.cfg.

UPGRADING SDP:
    This script can be useful in testing and upgrading to new versions of
    the SDP, when the '-test' flag is used.

EXAMPLES:
    Example 1: Setup of first instance

    Setup of the first instance on a machine using the default instance name,
    '1', executed after using sudo to become root:
    $ sudo su -
    $ cd /hxdepots/sdp/Server/Unix/setup
    $ vi mkdirs.cfg

    # Adjust settings as desired, e.g P4PORT, P4BROKERPORT, etc.

    $ ./mkdirs.sh 1
```

```
    A log will be generated, mkdirs.1.<timestamp>.log

    Example 2: Setup of additional instance named 'abc'.

    Setup a second instance on the machine, which will be a separate Helix
    Core instance with its own P4ROOT, its own set of users and
    changelists, and its own license file (copied from the master instance).

    Note that while the first run of mkdirs.sh on a given machine should be
    done as root, but subsequent instane additions should be done as the
    'perforce' user (or whatever operating system user accounts Perforce
    Helix services run as).

    $ sudo su - perforce
    $ cd /hxdepots/sdp/Server/Unix/setup
    $ cp -p mkdirs.cfg mkdirs.abc.cfg
    $ vi mkdirs.abc.cfg

    # Adjust settings in mkdirs.abc.cfg as desired, e.g P4PORT, P4BROKERPORT, etc.

    $ ./mkdirs.sh abc

    A log will be generated, mkdirs.abc.<timestamp>.log

    Example 3: Setup of additional instance named 'alpha' to run a p4p:

    $ ./mkdirs.sh alpha -t p4proxy
```

If you use a "name" for the instance (not an integer) you MUST modify the P4PORT variable in the `mkdirs.name.cfg` file.

The instance name must map to the name of the cfg file or the default file will be used with potentially unexpected results.

For example, `mkdirs.sh 1` requires `mkdirs.1.cfg`, or `mkdirs.sh lon` requires `mkdirs.lon.cfg`

3. Put the Perforce license file for the server into `/p4/1/root`

if you have multiple instances and have been provided with port-specific licenses by Perforce, the appropriate license file must be stored in the appropriate `/p4/<instance>/root` folder.

the license file must be renamed to simply the name `license`.

Your Helix Core instance is now setup, but not running. The next steps detail how to make the Helix Core server a system service.

You are then free to start up the `p4d` instance as documented Section 3.2.2.3, “Starting/Stopping

Perforce Server Products”

Please note that if you have configured SSL, then refer to Section 3.2.1.1, “Use of SSL”

3.2.1.1. Use of SSL

As documented in the comments in mkdirs.cfg, if you are planning to use SSL you need to set the value of:

```
SSL_PREFIX=ssl:
```

Then you need to put certificates in `/p4/ssl` after the SDP install or you can generate a self signed certificate as follows:

Edit `/p4/ssl/config.txt` to put in the info for your company. Then run:

```
/p4/common/bin/p4master_run <instance> /p4/<instance>/p4d_<instance> -Gc
```

For example using instance 1:

```
/p4/common/bin/p4master_run 1 /p4/1/bin/p4d_1 -Gc
```

In order to validate that SSL is working correctly:

```
source /p4/common/bin/p4_vars 1
```

Check that P4TRUST is appropriately set in the output of:

```
p4 set
```

Update the P4TRUST values:

```
p4 trust -y
p4 -p $P4MASTERPORT trust -y
```

Check the stored P4TRUST values:

```
p4 trust -l
```

Check you are not prompted for trust:

```
p4 login
p4 info
```

3.2.1.2. Configuration script mkdirs.cfg

The `mkdirs.sh` script executed above resides in `$SDP/Server/Unix/setup`. It sets up the basic directory structure used by the SDP. Carefully review the config file `mkdirs.instance.cfg` for this script before running it, and adjust the values of the variables as required. The important parameters are:

Parameter	Description
DB1	Name of the hxmetadata1 volume (can be same as DB2)
DB2	Name of the hxmetadata2 volume (can be same as DB1)
DD	Name of the hxdepots volume
LG	Name of the hxlogs volume
CN	Volume for /p4/common
SDP	Path to SDP distribution file tree
SHAREDDATA	TRUE or FALSE - whether sharing the /hxdepots volume with a replica - normally this is FALSE
ADMINUSER	P4USER value of a Perforce super user that operates SDP scripts, typically perforce or p4admin.
OSUSER	Operating system user that will run the Perforce instance, typically perforce.
OSGROUP	Operating system group that OSUSER belongs to, typically perforce.
CASE_SENSITIVE	Indicates if server has special case sensitivity settings
SSL_PREFIX	Set if SSL is required so either "ssl:" or blank for no SSL
P4ADMINPASS P4SERVICEPASS	Password to use for Perforce superuser account - can be edited later in /p4/common/config/.p4password.p4_1.admin Service User's password for replication - can be edited later - same dir as above.
P4MASTERHOST	Fully qualified DNS name of the Perforce master server machine for this instance. If an HA for an edge server this should refer to the edge server. Otherwise refer to the commit server.

For a detailed description of this config file it is fully documented with in-file comments, or see

3.2.2. Configuring (Automatic) Service Start on Boot

You normally want to configure your host such that the Helix Core Server (and/or Proxy or Broker) will autostart when the machine boots.

This is done using Systemd or Init scripts as covered below.

3.2.2.1. For Systems using systemd

RHEL 7 or 8, CentOS 7 or 8, SuSE 12, Ubuntu (>= v16.04) (and other) distributions utilize **systemd** / **systemctl** as the mechanism for controlling services, replacing the earlier init process. At present mkdirs.sh does **not** generate the systemd configuration file(s) automatically, but a sample is included in the SDP distribution in (`$SDP/Server/Unix/setup/systemd`), along with a README.md file that describes the configuration process, including for multiple instances.

We recommend that you give the OS user (perforce) sudo access, so that it can run the commands below prefixing them with sudo.

For simple installation run these commands as the root user (or prefix with `sudo`):

```
cp $SDP/Server/Unix/setup/system/p4d_1.system /etc/systemd/system/
sudo systemctl enable p4d_1
```

|The above enables service for auto-start on boot. The following show management commands:

```
sudo systemctl status p4d_1
sudo systemctl start p4d_1
sudo systemctl stop p4d_1
```

If you are using `systemd` and you have configured `systemctl` services, then it is vital you ALWAYS use `systemctl` to start/stop etc. Otherwise you risk database corruption if `systemd` does not think the service is running when it actually is running (for example - on shutdown `systemd` will just kill processes without doing it cleanly and waiting for them, because it thinks the service is not running).

3.2.2.2. For (older) systems using the SysV init mechanism (init.d)

The `mkdirs.sh` script creates a set of startup scripts in the instance-specific bin folder:

```
/p4/1/bin/p4d_1_init
/p4/1/bin/p4broker_1_init     # only created if a p4broker executable found
/p4/1/bin/p4p_1_init          # only created if a p4p executable found
```

Run these commands as the root user (or sudo): Repeat this step for all init scripts you wish to add.

```
cd /etc/init.d
ln -s /p4/1/bin/p4d_1_init
chkconfig --add p4d_1_init
chkconfig p4d_1_init on
```

3.2.2.3. Starting/Stopping Perforce Server Products

The SDP includes templates for initialization (start/stop) scripts, "init scripts," for a variety of Perforce server products, including:

- p4d
- p4broker
- p4p
- p4dtg

The init scripts are named `/p4/<instance>/bin/<service>_<instance>_init`, e.g. `/p4/1/bin/p4d_1_init` or `/p4/1/bin/p4broker_1_init`.

For example, the init script for starting p4d for Instance 1 is `/p4/1/bin/p4d_1_init`. All init scripts accept at least start, stop, and status arguments. The perforce user can start p4d by calling:

```
p4d_1_init start
```

And stop it by calling:

```
p4d_1_init stop
```

Once logged into Perforce as a super user, the p4 admin stop command can also be used to stop p4d.

All init scripts can be started as the perforce user or the root user. The application runs as the perforce user in any case. If the init scripts are configured as system services (non-systemd distributions), they can also be called by the root user using the service command, as in this example to start p4d:

```
service p4d_1_init start
```

Templates for the init scripts used by `mkdirs.sh` are stored in:

```
/p4/common/etc/init.d
```

There are also basic crontab templates for a Perforce master and replica server in:


```
/p4/common/etc/cron.d
```

These define schedules for routine checkpoint operations, replica status checks, and email reviews.

The Perforce should have a super user defined as named by the P4USER setting in mkdir.

To configure and start instance 1, follow these steps:

1. Start the Perforce server by calling

   ```
   p4d_1_init start
   ```

   or use `sudo systemctl start p4d_1` if using `sytemd`

3.2.3. Completing Your Server Configuration

1. Ensure that the admin user configured above has the correct password defined in `/p4/common/config/.p4passwd.p4_1.admin`, and then run the `p4login1` script (which calls the `p4 login` command using the `.p4passwd.p4_1.admin` file).
2. For new servers, run this script, which sets several recommended configurables:

   ```
   cd /p4/sdp/Server/setup/configure_new_server.sh 1
   ```

For existing servers, examine this file, and manually apply the p4 configure command to set configurables on your Perforce server.

Initialize the perforce user's crontab with one of these commands:

```
crontab /p4/p4.crontab
```

and customise execution times for the commands within the crontab files to suite the specific installation.

The SDP uses wrapper scripts in the crontab: `run_if_master.sh`, `run_if_edge.sh`, `run_if_replica.sh`. We suggest you ensure these are working as desired, e.g.

```
/p4/common/bin/run_if_master.sh 1 echo yes
/p4/common/bin/run_if_replica.sh 1 echo yes
/p4/common/bin/run_if_edge.sh 1 echo yes
```

The above should output `yes` if you are on the master (commit) machine (or replica/edge as appropriate), but otherwise nothing. Any issues with the above indicate incorrect values for `$MASTER_ID`, or for other values within `/p4/common/config/p4_1.vars` (assuming instance `1`). You can

debug this with:

```
bash -xv /p4/common/bin/run_if_master.sh 1 echo yes
```

If in doubt contact support.

3.2.4. Validating your SDP installation

Source your SDP environment variables and check that they look appropriate - for <instance> 1:

```
source /p4/common/bin/p4_vars 1
```

The output of `p4 set` should be something like:

```
P4CONFIG=/p4/1/.p4config (config 'noconfig')
P4ENVIRO=/dev/null/.p4enviro
P4JOURNAL=/p4/1/logs/journal
P4LOG=/p4/1/logs/log
P4PCACHE=/p4/1/cache
P4PORT=ssl:1666
P4ROOT=/p4/1/root
P4SSLDIR=/p4/ssl
P4TICKETS=/p4/1/.p4tickets
P4TRUST=/p4/1/.p4trust
P4USER=perforce
```

There is a script `/p4/common/bin/verify_sdp.sh`. Run this specifying the <instance> id, e.g.

```
/p4/common/bin/verify_sdp.sh 1
```

The output should be something like:

```
verify_sdp.sh v5.6.1 Starting SDP verification on host helixcorevm1 at Fri 2020-08-14
17:02:45 UTC with this command line:
/p4/common/bin/verify_sdp.sh 1
```

```
If you have any questions about the output from this script, contact
support@perforce.com.
--------------------------------------------------------------------------------
Doing preflight sanity checks.
Preflight Check: Ensuring these utils are in PATH: date ls grep awk id head tail
Verified: Essential tools are in the PATH.
Preflight Check: cd /p4/common/bin
Verified: cd works to: /p4/common/bin
Preflight Check: Checking current user owns /p4/common/bin
Verified: Current user [perforce] owns /p4/common/bin
Preflight Check: Checking /p4 and /p4/<instance> are local dirs.
Verified: P4HOME has expected value: /p4/1
Verified: This P4HOME path is not a symlink: /p4/1
Verified: cd to /p4 OK.
Verified: Dir /p4 is a local dir.
Verified: cd to /p4/1 OK.
Verified: P4HOME dir /p4/1 is a local dir.
```

Finishing with:

```
Verifications completed, with 0 errors and 0 warnings detected in 57 checks.
```

If it mentions something like:

```
Verifications completed, with 2 errors and 1 warnings detected in 57 checks.
```

then review the details. If in doubt contact Perforce Support: support@perforce.com

3.3. Setting your login environment for convenience

Consider adding this to your `.bashrc` for the perforce user as a convenience for when you login:

```
echo "source /p4/common/bin/p4_vars 1" >> ~/.bashrc
```

Obviously if you have multiple instances on the same machine you might want to setup an alias or two to quickly switch between them.

3.4. Configuring protections, file types, monitoring and security

After the server is installed and configured, either with the Helix Installer or a manual installation, wmost sites will want to modify server permissions ("Protections") and security settings. Other common configuration steps include modifying the file type map and enabling process monitoring. To configure permissions, perform the following steps:

1. To set up protections, issue the `p4 protect` command. The protections table is displayed.
2. Delete the following line:

   ```
   write user * * //depot/...
   ```

3. Define protections for your server using groups. Perforce uses an inclusionary model. No access is given by default, you must specifically grant access to users/groups in the protections table. It is best for performance to grant users specific access to the areas of the depot that they need rather than granting everyone open access, and then trying to remove access via exclusionary mappings in the protect table even if that means you end up generating a larger protect table.
4. To set the server's default file types, run the p4 typemap command and define typemap entries to override Perforce's default behavior.
5. Add any file type entries that are specific to your site. Suggestions:

   - For already-compressed file types (such as `.zip`, `.gz`, `.avi`, `.gif`), assign a file type of `binary+Fl` to prevent the server from attempting to compress them again before storing them.
   - For regular binary files, add `binary+l` to make so that only one person at a time can check them out.

   A sample file is provided in `$SDP/Server/config/typemap`

If you are doing things like games development with `Unreal Engine` or `Unity`, then there are specific recommended typemaps to add in KB articles: Search the Knowledge Base

1. To make your changelists default to restricted (for high security environments):

   ```
   p4 configure set defaultChangeType=restricted
   ```

3.5. Operating system configuration

Check Chapter 7, *Maximizing Server Performance* for detailed recommendations.

3.6. Other server configurables

There are various configurables that you should consider setting for your server.

Some suggestions are in the file: `$SDP/Server/setup/configure_new_server.sh`

Review the contents and either apply individual settings manually, or edit the file and apply the newly edited version. If you have any questions, please see the configurables section in Command Reference Guide appendix (get the right version for your server!). You can also contact support regarding questions.

3.7. Archiving configuration files

Now that the server is running properly, copy the following configuration files to the hxdepots volume for backup:

- Any init scripts used in `/etc/init.d` or any systemd scripts to `/etc/systemd/system`
- A copy of the crontab file, obtained using `crontab -l`.
- Any other relevant configuration scripts, such as cluster configuration scripts, failover scripts, or disk failover configuration files.

Chapter 4. Backup, Replication, and Recovery

Perforce servers maintain *metadata* and *versioned files*. The metadata contains all the information about the files in the depots. Metadata resides in database (db.*) files in the server's root directory (P4ROOT). The versioned files contain the file changes that have been submitted to the server. Versioned files reside on the hxdepots volume.

This section assumes that you understand the basics of Perforce backup and recovery. For more information, consult the Perforce System Administrator's Guide and failover.

4.1. Typical Backup Procedure

The SDP's maintenance scripts, run as `cron` tasks, periodically back up the metadata. The weekly sequence is described below.

Seven nights a week, perform the following tasks:

1. Truncate the active journal.
2. Replay the journal to the offline database. (Refer to Figure 2: SDP Runtime Structure and Volume Layout for more information on the location of the live and offline databases.)
3. Create a checkpoint from the offline database.
4. Recreate the offline database from the last checkpoint.

Once a week, perform the following tasks:

1. Verify all depot files.

Once every few months, perform the following tasks:

1. Stop the live server.
2. Truncate the active journal.
3. Replay the journal to the offline database. (Refer to Figure 2: SDP Runtime Structure and Volume Layout for more information on the location of the live and offline databases.)
4. Archive the live database.
5. Move the offline database to the live database directory.
6. Start the live server.
7. Create a new checkpoint from the archive of the live database.
8. Recreate the offline database from the last checkpoint.
9. Verify all depots.

This normal maintenance procedure puts the checkpoints (metadata snapshots) on the hxdepots volume, which contains the versioned files. Backing up the hxdepots volume with a normal backup utility like *robocopy* or *rsync* provides you with all the data necessary to recreate the server.

To ensure that the backup does not interfere with the metadata backups (checkpoints), coordinate backup of the hxdepots volume using the SDP maintenance scripts.

The preceding maintenance procedure minimizes server downtime, because checkpoints are created from offline or saved databases while the server is running.

With no additional configuration, the normal maintenance prevents loss of more than one day's metadata changes. To provide an optimal Recovery Point Objective (RPO), the SDP provides additional tools for replication.

4.2. Planning for HA and DR

The concepts for HA (High Availability) and DR (Disaster Recovery) are fairly similar - they are both types of Helix Core replica.

When you have servers with Services of `commit-server`, `standard`, or `edge-server` - see deployment architectures you should consider your requirements for how to recover from a failure to any such servers.

See also Replica types and use cases

The key issues are around ensuring that you have have appropriate values for the following measures for your Helix Core installation:

- RTO - Recovery Time Objective - how long will it take you to recover to a backup?
- RPO - Recovery Point Objective - how much data are you prepared to risk losing if you have to failover to a backup server?

We need to consider planned vs unplanned failover. Planned may be due to upgrading the core Operating System or some other dependency in your infrastructure, or a similar activity.

Unplanned covers risks you are seeking to mitigate with failover:

- loss of a machine, or some machine related hardware failure (e.g. network)
- loss of a VM cluster
- failure of storage
- loss of a data center or machine room
- etc...

So, if your main `commit-server` fails, how fast should be you be able to be up and running again, and how much data might you be prepared to lose? What is the potential disruption to your organisation if the Helix Core repository is down? How many people would be impacted in some way?

You also need to consider the costs of your mitigation strategies. For example, this can range from:

- taking a backup once per 24 hours and requiring maybe an hour or two to restore it. Thus you might lose up to 24 hours of work for an unplanned failure, and require several hours to

restore.

- having a high availability replica which is a mirror of the server hardware and ready to take over within minutes if required

Having a replica for HA or DR is likely to reduce your RPO and RTO to well under an hour (<10 minutes if properly prepared for) - at the cost of the resources to run such a replica, and the management overhead to monitor it appropriately.

Typically we would define:

- An HA replica is close to its upstream server, e.g. in the same Data Center - this minimises the latency for replication, and reduces RPO
- A DR replica is in a more remote location, so maybe risks being further behind in replication (thus higher RPO), but mitigates against catastrophic loss of a data center or similar. Note that "further behind" is still typically seconds for metadata, but can be minutes for submits with many GB of files.

4.2.1. Further Resources

- High Reliability Solutions

4.2.2. Creating a Failover Replica for Commit or Edge Server

A commit server is the ultimate store for submitted data, and also for any workspace state (WIP - work in progress) for users directly working with the commit server.

An edge server maintains its own copy of workspace state (WIP). If you have people connecting to an edge server, then any workspaces they create (and files they open for some action) will be only stored on the edge server. Thus it is normally recommended to have an HA backup server, so that users don't lose their state in case of failover.

There is a concept of a "build edge" which is an edge server which only supports build farm users. In this scenario it may be deemed acceptable to not have an HA backup server, since in the case of failure of the edge, it can be re-seeded from the commit server. All build farm clients would be recreated from scratch so there would be no problems.

4.2.3. What is a Failover Replica?

As of 2018.2 release, p4d supports a `p4 failover` command that performs a failover to a `standby` replica (i.e. a replica with `Services:` field value set to `standby` or `forwarding-standby`). Such a replica performs a `journalcopy` replication of metadata, with a local pull thread to update its `db.*` files.

See also: Configuring a Helix Core Standby.

On Unix the SDP script Section 4.3.4, "Using mkrep.sh" greatly simplifies the process of setting up a replica suitable for use with the `p4 failover` command.

4.2.4. Mandatory vs Non-mandatory Standbys

You can modify the server spec of a `standby` replica to make it `mandatory`.

When a `standby` server is configured as mandatory, the master/commit server will wait until this server confirms it has processed journal data before allow that journal data to be released to other replicas. This can simplify failover, since it provides a guarantee that no downstream servers are **ahead** of the replica.

Thus downstream servers can simply be re-directed to point to the standby and will carry on working without problems.

If a server which is marked as `mandatory` goes offline for any reason, the replication to other replicas will stop replicating. In this scenario, the server spec of the replica can be changed to `nomdandatory`, and then replication will immediately resume (so long as the replication has not been offline for too long, typically several days or weeks depending on the KEEPJNLS setting).

If set to `nomandatory` then there is no risk of delaying dowsntream replicas, however there is equally no guarantee that they will be able to switch seamlessly over to the new server.

We recommend creating `mandatory` replica(s) if the server is local to its commit server, and also if you have good monitoring in place to quickly detect replication lag or other issues.

To change a server spec to be `mandatory` or `nomandatory`, modify the server spec with a command like `p4 server p4d_ha_bos` to edit the form, and then change the value in the `Options:` field to be as desired, `mandatory` or `nomandatory`, and the save and exit the editor.

4.2.5. Server host naming conventions

This is recommended, but not a requirement for SDP scripts to implement failover.

- Use a name that does not indicate switchable roles, e.g. don't indicate in the name whether a host is a master/primary or backup, or edge server and it's backup. This might otherwise lead to confusion once you have performed a failover and the host name is no longer appropriate.
- Use names ending numeric designators, e.g. -01 or -05. The goal is to avoid being in a post-failover situation where a machine with `master` or `primary` is actually the backup. Also, the assumption is that host names will never need to change.
- While you don't want switchable roles baked into the hostname, you can have static roles, e.g. use p4d vs. p4p in the host name (as those generally don't change). The p4d could be primary, standby, edge, edge's standby (switchable roles).
- Using a short geographic site is sometimes helpful/desirable. If used, use the same site tag used in the ServerID, e.g. aus.

  Valid site tags should be listed in: `/p4/common/config/SiteTags.cfg` - see Section 4.3.4.1, "SiteTags.cfg"

- Using a short tag to indicate the major OS version is sometimes helpful/desirable, eg. c7 for CentOS 7, or r8 for RHEL 8. This is based on the idea that when the major OS is upgraded, you either move to new hardware, or change the host name (an exception to the rule above about never changing the hostname). This option maybe overkill for many sites.
- End users should reference a DNS name that may include the site tag, but would exclude the number, OS indicator, and server type (`p4d`/`p4p`/`p4broker`), replacing all that with just `perforce` or optionally just `p4`. General idea is that users needn't be bothered by under-the-covers tech of whether something is a proxy or replica.
- For edge servers, it is advisable to include `edge` in both the host and DNS name, as users and admins needs to be aware of the functional differences due to a server being an edge server.

Examples:

- `p4d-aus-r7-03`, a master in Austin on RHEL 7, pointed to by a DNS name like `p4-aus`.
- `p4d-aus-03`, a master in Austin (no indication of server OS), pointed to by a DNS name like `p4-aus`.
- `p4d-aus-r7-04`, a standby replica in Austin on RHEL 7, not pointed to by a DNS until failover, at which point it gets pointed to by `p4-aus`.
- `p4p-syd-r8-05`, a proxy in Sydney on RHEL 8, pointed to by a DNS name like `p4-syd`.
- `p4d-syd-r8-04`, a replica that replaced the proxy in Sydney, on RHEL 8, pointed to by a DNS name like `p4-syd` (same as the proxy it replaced).
- `p4d-edge-tok-s12-03`, an edge in Tokyo running SuSE12, pointed to by a DNS name like `p4edge-tok`.
- `p4d-edge-tok-s12-04`, a replica of an edge in Tokyo running SuSE12, not pointed to by a DNS name until failover, at which point it gets pointed to by `p4edge-tok`.

FQDNs (fully qualified DNS names) of short DNS names used in these examples would also exist, and would be based on the same short names.

4.3. Full One-Way Replication

Perforce supports a full one-way replication of data from a master server to a replica, including versioned files. The p4 pull command is the replication mechanism, and a replica server can be configured to know it is a replica and use the replication command. The p4 pull mechanism requires very little configuration and no additional scripting. As this replication mechanism is simple and effective, we recommend it as the preferred replication technique. Replica servers can also be configured to only contain metadata, which can be useful for reporting or offline checkpointing purposes. See the Distributing Perforce Guide for details on setting up replica servers.

If you wish to use the replica as a read-only server, you can use the P4Broker to direct read-only commands to the replica or you can use a forwarding replica. The broker can do load balancing to a pool of replicas if you need more than one replica to handle your load.

4.3.1. Replication Setup

To configure a replica server, first configure a machine identically to the master server (at least as regards the link structure such as `/p4`, `/p4/common/bin` and `/p4/instance/*`), then install the SDP on it to match the master server installation. Once the machine and SDP install is in place, you need to configure the master server for replication.

Perforce supports many types of replicas suited to a variety of purposes, such as:

- Real-time backup,
- Providing a disaster recovery solution,
- Load distribution to enhance performance,
- Distributed development,
- Dedicated resources for automated systems, such as build servers, and more.

We always recommend first setting up the replica as a read-only replica and ensuring that everything is working. Once that is the case you can easily modify server specs and configurables to change it to a forwarding replica, or an edge server etc.

4.3.2. Replication Setup for Failover

This is just a special case of replication, but implementing Section 4.2.3, “What is a Failover Replica?”

Please note the section below Section 4.3.4, “Using mkrep.sh” which implements many details.

4.3.3. Pre-requisites for Failover

These are vital as part of your planning.

- Obtain and install a license for your replica(s)

  Your commit or standard server has a license file (tied to IP address), while your replicas do not require one to function as replicas.

  However, in order for a replica to function as a replacement for a commit or standard server, it must have a suitable license installed.

  This should be requested when the replica is first created. See the form: https://www.perforce.com/support/duplicate-server-request

- Review your authentication mechanism (LDAP etc) - is the LDAP server contactable from the replica machine (firewalls etc configured appropriately).
- Review all your triggers and how they are deployed - will they work on the failover host?

  Is the right version of Perl/Python etc correctly installed and configured on the failover host with all imported libraries?

TEST, TEST, TEST!!! It is important to test the above issues as part of your planning. For peace of mind you don't want to be finding problems at the time of trying to failover for real, which may be in the middle of the night!

On Linux:

- Review the configuration of options such as Section 7.1, "Ensure Transparent Huge Pages (THP) is turned off" and also Section 7.2, "Putting server.locks directory into RAM" are correctly configured for your HA server machine - otherwise you **risk reduced performance** after failover.

4.3.4. Using mkrep.sh

The SDP `mkrep.sh` script should be used to expand your Helix Topology, e.g. adding replicas and edge servers.

When creating server machines to be used as Helix servers, the server machines should be named following a well-designed host naming convention. The SDP has no dependency on the convetion used, and so any existing local naming convetion can be applied. The SDP includes a suggesetd naming convention in Section 4.2.5, "Server host naming conventions"

Usage

```
USAGE for mkrep.sh v2.7.2:

mkrep.sh -i <SDP_Instance> -t <Type> -s <Site_Tag> -r <Replica_Host> [-f
<From_ServerID>] [-p] [-L <log>] [-v<n>] [-n] [-D]

or

mkrep.sh [-h|-man|-V]


DESCRIPTION:
    This script simplifies the task of creating Helix Core replicas and
    edge servers, and helps ensure they are setup with best practices.

    This script does all the metadata configuration to be executed on the
    master server that must be baked into a seed checkpoint for creating
    the replica/edge. It also provides enough information to create,
    transfer, and load seed checkpoints into the replica/edge.  This
    essentially captures the planning for a new replica, and can be
    done before the physical infratructure (hardware and storage) is
    ready.

    Before using this script, a set of geograpic site tags must be defined.
    See the FILES: below for details on a site tags.
```

```
    This script adheres to the these SDP Standards:
    * Server Spec Naming Standard:
https://swarm.workshop.perforce.com/view/guest/perforce_software/sdp/main/doc/ServerSp
ecNamingStandard.html
    * Journal Prefix Standard:
https://swarm.workshop.perforce.com/view/guest/perforce_software/sdp/main/doc/JournalP
refixStandard.html

    This script does the following to help create a replica or edge server:
    * Generates the server spec for the the replica.
    * Generates a server spec for master server (if needed).
    * Sets configurables ('p4 configure' settings) for replication.
    * Selects the correct 'Services' based on replica type.
    * Creates service user for the replica, and sets a password.
    * Creates service user for the master (if needed), and sets a password.
    * Addes newly created service users to the group 'ServiceUsers'.
    * Verifies the group ServiceUsers is granted super access in the
    protections table (and with the '-p', updations Protections).

    After these steps are completed, detailed instructions are presented
    to the user through the remaining steps needed to complete the
    deployment of the replica.  This starts with creating a new
    checkpoint to capture all the metadata changes made by this
    script.

SERVICE USERS:
    Service users created by this type are always of type 'service',
    and so will not consume a licensed seat.

    Service users also have an 'AuthMethod' of 'perforce' (not
    'ldap') as is required by 'p4d' for 'service' users.  Passwords
    set for service users are long 32 character random strings
    that are not stored, as they are never needed.  Login tickets for
    service users are generated using: p4login -service -v

OPTIONS:
 -i <SDP_Instance>
    Specify the SDP Instance.

 -t <Type>
    Specify the replica type tag. The type corresponds to the 'Type:' and
    'Services:' field of the server spec, which describes the type of services
    offered by a given replica.

    Valid values are:
    * ha:   High Availability standby replica, for 'p4 failover' (P4D 2018.2+)
    * ham:  High Availability metadata-only standby replica, for 'p4 failover' (P4D
2018.2+)
    * ro:   Read-Only standby replica.
    * rom:  Read-Only standby replica, Metadata only.
    * fr:   Forwarding Replica (Unfiltered).
```

```
    * fs:   Forwarding Standby (Unfiltered).
    * frm:  Forwarding Replica (Unfiltered, Metadata only).
    * fsm:  Forwarding Standby (Unfiltered, Metadata only).
    * ffr:  Filtered Forwarding Replica.  Not a valid failover target.
    * edge: Edge Server. Filtered by definition.

    Replicas with 'standby' are always unfiltered, and use the 'journalcopy'
    method of replication, which copies a byte-for-byte verbatim journal file
    rather than one that is merely logically equivalent.

    The tag has several purposes:
    1. Short Hand. Each tag represents a combination of 'Type:' and fully
    qualified 'Services:' values used in server specs.

    2. Distillation. Only the most useful Type/Services combinations have a
    shorthand form.

    3. For forwarding replicas, the name includes the critical distinction of
    whether any replication filtering is used; as filtering of any kind disqualifies
    a replica from being a potential failover target. (No such distinction is
    needed for edge servers, which are filtered by definition).

-s <Site_Tag>
    Specify a geographic site tag indicating the location and/or data center where
    the replica will physically be located. Valid site tags are defined in the site
    tags file:

    /p4/common/config/SiteTags.cfg

-r <Replica_Host>
    Specify the target replica host.

-f <From_ServerID>
    Specify ServerID of the P4TARGET server from which we are replicating.
    This is used to populate the 'ReplicatingFrom' field of the server
    spec. The value must be a valid ServerID.

    By default, this is determined dynamically by checking the ServerID
    of the master server. This option should be used if the target is
    something other than the master. For example, to create an HA replica
    of an edge server, you might specify something like '-f p4d_edge_syd'.

-p This script performs a check to ensure that the Protections table grants
    super access to the group ServiceUsers.

    By default, an error is displayed if the check fails, i.e. if super user
    access for the group ServiceUsers cannot be verified. This is
    because, by default, we want to avoid making changes to the Protections
    table. Some sites have local policies or custom automation that requires
    site-specific procedures to update the Protections table.
```

```
    If '-p' is specified, an attempt is made to append the Protections table
    an entry like:

    super group ServiceUsers * //...

 -v<n>    Set verbosity 1-5 (-v1 = quiet, -v5 = highest).

 -L <log>
    Specify the path to a log file, or the special value 'off' to disable
    logging. By default, all output (stdout and stderr) goes in the logs
    directory referenced by $LOGS environment variable, in a file named
    mkrep.<timestamp>.log

    NOTE: This script is self-logging. That is, output displayed on the screen
    is simultaneously captured in the log file. Do not run this script with
    redirection operators like '> log' or '2>&1', and do not use 'tee.'

 -n No-Op. Prints commands instead of running them.

 -D Set extreme debugging verbosity.

HELP OPTIONS:
 -h Display short help message
 -man   Display man-style help message
 -V Dispay version info for this script and its libraries.

FILES:
    This Site Tags file defines the list of valid geographic site tags:
    /p4/common/config/SiteTags.cfg

    The contains one-line entries of the form:

    <tag>: <description>

    where <tag> is a short alphanumeric tag name for a geographic location,
    data center, or other useful distinction. This tag is incorporated into
        the ServerID of replicas or edge servers created by this script.  Tag
    names should be kept short, ideally no more than about 5 characters in
    length.

    The <description> is a one-line text description of what the tag
    refers to, which may contain spaces and ASCII punctuation.

    Blank lines and lines starting with a '#' are considered comments
    and are ignored.

REPLICA SERVER MACHINE SETUP:
    The replica/edge server machine must be have the SDP structure installed,
    either using the mkdirs.sh script included in the SDP, or the Helix
    Installer for 'green field' installations.
```

```
    When setting up an edge server, a replica of an edge server, or filtered
    replica, confirm that the JournaPrefix Standard (see URL above) structure
    has the separate checkpoints folder as identified in the 'Second Form' in
    the standard.  A baseline SDP structure can typically be extended by running
    commands like like these samples (assuming a ServerID of p4d_edge_syd or
    p4d_ha_edge_syd):

       mkdir /hxdepots/p4/1/checkpoints.edge_syd
       cd /p4/1
       ln -s /hxdepots/p4/1/checkpoints.edge_syd

EXAMPLES:
    EXAMPLE 1 - Set up a High Availability (HA) Replica of the master.

    Add an HA replica to instance 1 to run on host bos-helix-02:
    mkrep.sh -i 1 -t ha -s bos -r bos-helix-02

    EXAMPLE 2 - Add an Edge Server to the topology.

    Add an Edge server to instance acme to run on host syd-helix-04:

    mkrep.sh -i acme -t edge -s syd -r syd-helix-04

    EXAMPLE 3 - Setup an HA replica of an edge server.

    Add a HA replica of the edge server to instance acme to run on host syd-helix-05:

    mkrep.sh -i acme -t ha -f p4d_edge_syd -s syd -r syd-helix-05
```

4.3.4.1. SiteTags.cfg

The `mkrep.sh` documentation references a SiteTags.cfg file used to register short tag names for geographic sites. Location is: `/p4/common/config/SiteTags.cfg`

Example/Format

```
# Valid Geographic site tags.

# Each is intended to indciate a geography, and optionally a specific Data
# Center (or Computer Room, or Computer Closet) within a given geographic
# location.
#
# The format is:
# Name:Description
# The Name must be alphanumeric only. The Description may contain spaces.
# Lines starting with # and blank lines are ignored.

bej: Beijing, China
bos: Boston, MA, USA
blr: Bangalore, India
chi: Chicago greater metro area
cni: Chennai, India
pune: Pune, India
lv: Las Vegas, NV, USA
mlb: Melbourne, Australia
syd: Sydney, Australia
```

4.3.4.2. Output of `mkrep.sh`

The output of `mkrep.sh` (which is also written to a log file in `/p4/<instance>/logs/mkrep.*`) describes a number of steps required to continue setting up the replica after the metadata configuration performed by the script is done.

4.3.5. Addition Replication Setup

In addition to steps recommended by `mkrep.sh`, there are other steps to be aware of to prepare a replica server machine.

4.3.6. SDP Installation

The SDP must first be installed on the replica server machine. If SDP already exists on the machine but not for the current instance, then `mkdirs.sh` must be used to add a new instance to the machine.

4.3.6.1. SSH Key Setup

SSH keys for the `perforce` operating system user should be setup to allow the `perforce` user to `ssh` and `rsync` among the Helix server machines in the topoolgy. If no `~perforce/.ssh` directory exist on a machine, it can be created with this command:

4.4. Recovery Procedures

There are three scenarios that require you to recover server data:

Metadata	Depotdata	Action required
lost or corrupt	Intact	Recover metadata as described below
Intact	lost or corrupt	Call Perforce Support
lost or corrupt	lost or corrupt	Recover metadata as described below. Recover the hxdepots volume using your normal backup utilities.

Restoring the metadata from a backup also optimizes the database files.

4.4.1. Recovering a master server from a checkpoint and journal(s)

The checkpoint files are stored in the `/p4/instance/checkpoints` directory, and the most recent checkpoint is named `p4_instance.ckp.number.gz`. Recreating up-to-date database files requires the most recent checkpoint, from `/p4/instance/checkpoints` and the journal file from `/p4/instance/logs`.

To recover the server database manually, perform the following steps from the root directory of the server (/p4/instance/root).

Assuming instance 1:

1. Stop the Perforce Server by issuing the following command:

   ```
   /p4/1/bin/p4_1 admin stop
   ```

2. Delete the old database files in the `/p4/1/root/save` directory
3. Move the live database files (db.*) to the save directory.
4. Use the following command to restore from the most recent checkpoint.

   ```
   /p4/1/bin/p4d_1 -r /p4/1/root -jr -z /p4/1/checkpoints/p4_1.ckp.####.gz
   ```

5. To replay the transactions that occurred after the checkpoint was created, issue the following command:

   ```
   /p4/1/bin/p4d_1 -r /p4/1/root -jr /p4/1/logs/journal
   ```

6. Restart your Perforce server.

If the Perforce service starts without errors, delete the old database files from `/p4/instance/root/save`.

If problems are reported when you attempt to recover from the most recent checkpoint, try recovering from the preceding checkpoint and journal. If you are successful, replay the subsequent journal. If the journals are corrupted, contact Perforce Technical Support. For full details about backup and recovery, refer to the Perforce System Administrator's Guide.

4.4.2. Recovering a replica from a checkpoint

This is very similar to creating a replica in the first place as described above.

If you have been running the replica crontab commands as suggested, then you will have the latest checkpoints from the master already copied across to the replica through the use of Section 8.5.30, "sync_replica.sh".

See the steps in the script Section 8.5.30, "sync_replica.sh" for details (note that it deletes the state and rdb.lbr files from the replica root directory so that the replica starts replicating from the start of a journal).

Remember to ensure you have logged the service user in to the master server (and that the ticket is stored in the correct location as described when setting up the replica).

4.4.3. Recovering from a tape backup

This section describes how to recover from a tape or other offline backup to a new server machine if the server machine fails. The tape backup for the server is made from the hxdepots volume. The new server machine must have the same volume layout and user/group settings as the original server. In other words, the new server must be as identical as possible to the server that failed.

To recover from a tape backup, perform the following steps (assuming instance 1):

1. Recover the hxdepots volume from your backup tape.
2. Create the `/p4` convenience directory on the OS volume.
3. Create the directories `/metadata/p4/1/root/save` and `/metadata/p4/1/offline_db`.
4. Change ownership of these directories to the OS account that runs the Perforce processes.
5. Switch to the Perforce OS account, and create a link in the `/p4` directory to `/depotadata/p4/1`.
6. Create a link in the `/p4` directory to `/hxdepots/p4/common`.
7. As a super-user, reinstall and enable the `init.d` scripts
8. Find the last available checkpoint, under `/p4/1/checkpoints`
9. Recover the latest checkpoint by running:

```
/p4/1/bin/p4d_1 -r /p4/1/root -jr -z <last_ckp_file>
```

10. Recover the checkpoint to the offline_db directory (assuming instance 1):

```
/p4/1/bin/p4d_1 -r /p4/1/offline_db -jr -z <last_ckp_file>
```


11. Reinstall the Perforce server license to the server root directory.
12. Start the perforce service by running 1/p4/1/bin/p4d_1_init start `
13. Verify that the server instance is running.
14. Reinstall the server crontab or scheduled tasks.
15. Perform any other initial server machine configuration.
16. Verify the database and versioned files by running the `p4verify.sh` script. Note that files using the `+k` file type modifier might be reported as BAD! after being moved. Contact Perforce Technical Support for assistance in determining if these files are actually corrupt.

4.4.4. Failover to a replicated standby machine

See SDP Failover Guide (PDF) or SDP Failover Guide (HTML) for detailed steps.

Chapter 5. Upgrades

This section describse both upgrades of the SDP itself, as well as upgrades of Helix software such as p4d, p4broker, p4p, and the the p4 command line client in the SDP structure.

5.1. Upgrade Order: SDP first, then Helix P4D

The SDP should be upgraded prior to the upgrade of Helix Core (P4D). If you are upgrading P4D to or beyond P4D 2019.1 from a prior version of P4D, you *must* upgrade the SDP first. If you run multiple instances of P4D on a given machine (potentially each running different versions of P4D), upgrade the SDP first before upgrading any of the instances.

The SDP should also be upgraded before upgrading other Helix software on machines using the SDP, including p4d, p4p, p4broker, and p4 (the command line client).

Upgrading a Helix Core server instance in the SDP framework is a simple process involving a few steps.

5.2. SDP and P4D Version Compatibility

Starting with the SDP 2020.1 release, the released versions of SDP match released versions of P4D. So SDP r20.1 will be guaranteed to work with P4D r20.1.

The SDP is often forward- and backward-compatible with P4D versions, but for best results they should be kept in sync by upgrading SDP before P4D. This is partly becuase the SDP contains logic that helps upgrade P4D, which can change as P4D evolves.

The SDP is aware of the P4D version, and has backward-compatibility logic to support older versions of P4D. This is guaranteed for supported versions of P4D. Backward compatiblity of SDP with older versions of P4D may extend farther back, though without the "offically supported" guarantee.

5.3. Upgrading the SDP

Starting with the SPD 2021.1 release, upgrades of the SDP from 2020.1 and later will use a new mechanism. The SDP upgrade procedure starting form 2020.1 and later will be described in detail in 2021.1 release. Some highlights of the coming upgrade mechanisms:

- **Automated**: Upgrades from SPD 2020.1 will be automated with script(s) to be provided with each new version of the SDP.
- **Continuous**: Each new SDP version will maintain the capability to
- **Independent**: SDP upgrades will enable upgrades to new Helix Core versions, but will not cause Helix Core upgrades to occur immediately. Each Helix Core instance can be upgraded independently on its own schedule.

If your current SDP is older than the 2020.1 release, see the SDP Legacy Upgrade Guide (for Unix) for information on upgrading SDP to the SDP 2020.1 from any prior version (dating back to 2007).

5.4. Upgrading Helix Software with the SDP

The following outlines the procedure for upgrading Helix binaries using the SDP scripts.

5.4.1. Get Latest Helix Binaries

Acquire the latest Perforce Helix binaries to stage them for upgrade using the `get_helix_binaries.sh` script.

If you have mulitple server machines with SDP, staging can be done with this script on one machine first, and then the `/hxdepots/sdp/helix_binaries` folder can be rsync'd to other machines.

Alternately, this script can be run on the each machine, but as patches can be released at any time, running it once and then distributing the helix_binaries directory internally via rsync is preferred to ensure all machines at your site deploy with the same binaries.

See Section 8.2.1, "get_helix_binaries.sh"

5.4.2. Upgrade Each Instance

Use the SDP `upgrade.sh` script to upgrade each instance of Helix on the current machine, using the staged binaries. The upgrade process handles all aspects of upgrading, including adjusting the database structure, excuting commands to upgrade the p4d database schema, and managing the SDP symlinks in `/p4/common/bin`.

Instances can be upgraded independently of each other.

See Section 8.2.2, "upgrade.sh".

5.4.3. Global Topology Upgrades - Outer to Inner

For any given instance, be aware of the Helix topology when performing upgrades, specifically whether that instance has replicas and/or edge servers. When replicas and edge servers exist (and are active), the order in which `upgrade.sh` must be run on different server machines matters. Perform upgrades following an "outer to inner" strategy.

For example, say for SDP instance 1, your site has the following server machines:

- bos-helix-01 - The master (in Boston, USA)
- bos-helix-02 - Replica of master (in Boston, USA)
- nyc-helix-03 - Replica of master (in New York, USA)
- syd-helix-04 - Edge Server (in Sydney, AU)
- syd-helix-05 - Replica of Sydney edge (in Sydney)

Envision the above topology with the master server in the center, and two concentric circles.

The Replica of the Sydney edge would be done first, as it is by itself in the outermost.

The Edge server and two Replicas of the master are all at the next inner circle. So bos-helix-02, nyc-

helix-03, and syd-helix-04 could be upgraded in any order with respect to each other, or even simultaneously, as they are in the same circle.

The master is the innermost, and would be upgraded last.

If the user were logged in as as the `perforce` operating system user on a machine with properly configured SSH keys, the global topology could be done somethin like this (after distributing /hxddepots/sdp/helix_binaries to all machines):

```
ssh syd-helix-05 upgrade.sh
ssh syd-helix-04 upgrade.sh
ssh nyc-helix-03 upgrade.sh
ssh bos-helix-02 upgrade.sh
ssh bos-helix-01 upgrade.sh
```

Chapter 6. Database Modifications

Occasionally modifications are made to the Perforce database from one release to another. For example, server upgrades and some recovery procedures modify the database.

When upgrading the server, replaying a journal patch, or performing any activity that modifies the db.* files, you must restart the offline checkpoint process so that the files in the offline_db directory match the ones in the live server directory. The easiest way to restart the offline checkpoint process is to run the live_checkpoint script after modifying the db.* files, as follows:

```
/p4/common/bin/live_checkpoint.sh 1
```

This script makes a new checkpoint of the modified database files in the live `root` directory, then recovers that checkpoint to the `offline_db` directory so that both directories are in sync. This script can also be used anytime to create a checkpoint of the live database.

This command should be run when an error occurs during offline checkpointing. It restarts the offline checkpoint process from the live database files to bring the offline copy back in sync. If the live checkpoint script fails, contact Perforce Consulting at consulting@perforce.com.

Chapter 7. Maximizing Server Performance

The following sections provide some guidelines for maximizing the performance of the Perforce Server, using tools provided by the SDP. More information on this topic can be found in the Knowledge Base.

7.1. Ensure Transparent Huge Pages (THP) is turned off

This is reference KB Article on Platform Notes

There is a script in the SDP which will do this:

```
/p4/sdp/Server/Unix/setup/os_tweaks.sh
```

It needs to be run as `root` or using `sudo`. This will not persist after system is rebooted.

We recommend the usage of `tuned`

Install as appropriate for your Linux distribution (so as `root`):

```
yum install tuned
```

or

```
apt-get install tuned
```

1. Create a customized `tuned` profile with disabled THP. Create a new directory in `/etc/tuned` directory with desired profile name:

   ```
   mkdir /etc/tuned/nothp_profile
   ```

2. Then create a new `tuned.conf` file for `nothp_profile`, and insert the new tuning info:

   ```
   cat <<EOF > /etc/tuned/nothp_profile/tuned.conf
   [main]
   include= throughput-performance
   ```

   ```
   [vm]
   transparent_hugepages=never
   EOF
   ```

3. Make the script executable

```
chmod +x /etc/tuned/nothp_profile/tuned.conf
```

4. Enable `nothp_profile` using the `tuned-adm` command.

```
tuned-adm profile nothp_profile
```

5. This change will immediately take effect and persist after reboots. To verify if THP are disabled or not, run below command:

```
cat /sys/kernel/mm/transparent_hugepage/enabled
always madvise [never]
```

7.2. Putting server.locks directory into RAM

The `server.locks` directory is maintained in the $P4ROOT (so `/p4/1/root`) for a running server. This directory contains a tree of 17 byte long files which is used for lock co-ordination amongst p4d processes.

This directory can be removed every time the p4d instance is restarted, so it is safe to put it into a tmpfs filesystem.

Even on a large installation with many hundreds or thousands of users, this directory will be unlikely to exceed 1GB, so a 2GB filesystem will be ample.

Instructions (as user `root`):

1. Create directory to mount, and change ownership to `perforce` user (or `$OSUSER` if SDP config specifies a different name)

```
mkdir /hxserverlocks
chown perforce:perforce /hxserverlocks
```

2. Add a line to `/etc/fstab`:

```
tmpfs /hxserverlocks tmpfs size=1G,mode=0755 0 0
```

3. Mount the drive:

```
mount -a
```

4. Check it is looking correct:

```
df -h
```

As user `perforce`, set the configurable, specifying the serverid of your server (to ensure it is not set globally and picked up by all replicas):

```
p4 configure set <serverid>#server.locks.dir=<serverlocks dir>
```

```
p4 configure set master.1#server.locks.dir=/p4serverlocks
```

This will take effect immediately - it does not require a server restart.

If you set this globally (without `servid#` prefix), then you should ensure that all replicas have a similarly named directory availab.e

Consider failover options - so review your HA failover server configuration and create a similar entry - otherwise if you failover then performance will be reduced.

7.3. Optimizing the database files

The Perforce Server's database is composed of b-tree files. The server does not fully rebalance and compress them during normal operation. To optimize the files, you must checkpoint and restore the server. This normally only needs to be done very few months.

To minimize the size of back up files and maximize server performance, minimize the size of the db.have and db.label files.

7.4. P4V Performance Settings

These are covered in: https://community.perforce.com/s/article/2878

7.5. Proactive Performance Maintenance

This section describes some things that can be done to proactively to enhance scalability and maintain performance.

7.5.1. Limiting large requests

To prevent large requests from overwhelming the server, you can limit the amount of data and time allowed per query by setting the maxresults, maxscanrows and maxlocktime parameters to the lowest setting that does not interfere with normal daily activities. As a good starting point, set maxscanrows to maxresults * 3; set maxresults to slightly larger than the maximum number of files the users need to be able to sync to do their work; and set maxlocktime to 30000 milliseconds. These

values must be adjusted up as the size of your server and the number of revisions of the files grow. To simplify administration, assign limits to groups rather than individual users.

To prevent users from inadvertently accessing large numbers of files, define their client view to be as narrow as possible, considering the requirements of their work. Similarly, limit users' access in the protections table to the smallest number of directories that are required for them to do their job.

Finally, keep triggers simple. Complex triggers increase load on the server.

7.5.2. Offloading remote syncs

For remote users who need to sync large numbers of files, Perforce offers a proxy server. P4P, the Perforce Proxy, is run on a machine that is on the remote users' local network. The Perforce Proxy caches file revisions, serving them to the remote users and diverting that load from the main server.

P4P is included in the Windows installer. To launch P4P on Unix machines, copy the `/p4/common/etc/init.d/p4p_1_init script` to `/p4/1/bin/p4p_1_init`. Then review and customize the script to specify your server volume names and directories.

P4P does not require special hardware but it can be quite CPU intensive if it is working with binary files, which are CPU-intensive to attempt to compress. It doesn’t need to be backed up. If the P4P instance isn’t working, users can switch their port back to the main server and continue working until the instance of P4P is fixed.

Chapter 8. Tools and Scripts

This section describes the various scripts and files provided as part of the SDP package.

8.1. General SDP Usage

This section presents an overview of the SDP scripts and tools, with details covered in subsequent sections.

8.1.1. Linux

Most scripts and tools reside in `/p4/common/bin`. The `/p4/<instance>/bin` directory (e.g. `/p4/1/bin`) contains scripts or links that are specific to that instance such as wrappers for the p4d executable.

Older versions of the SDP required you to always run important administrative commands using the `p4master_run` script, and specify fully qualified paths. This script loads environment information from `/p4/common/bin/p4_vars`, the central environment file of the SDP, ensuring a controlled environment. The `p4_vars` file includes instance specific environment data from `/p4/common/config/p4_instance.vars` e.g. `/p4/common/config/p4_1.vars`. The `p4master_run script` is still used when running p4 commands against the server unless you set up your environment first by sourcing p4_vars with the instance as a parameter (for bash shell: `source /p4/common/bin/p4_vars 1`). Administrative scripts, such as `daily_backup.sh`, no longer need to be called with `p4master_run` however, they just need you to pass the instance number to them as a parameter.

When invoking a Perforce command directly on the server machine, use the p4_***instance*** wrapper that is located in `/p4/instance/bin`. This wrapper invokes the correct version of the p4 client for the instance. The use of these wrappers enables easy upgrades, because the wrapper is a link to the correct version of the p4 client. There is a similar wrapper for the p4d executable, called p4d_***instance***.

This wrapper is important to handle case sensitivity in a consistent manner, e.g. when running a Unix server in case-insensitive mode. If you just execut `p4d` directly when it should be case-insenstive, then you may cause problems, or commands will fail.

Below are some usage examples for instance 1.

Example	*Remarks*
`/p4/common/bin/p4master_run 1 /p4/1/bin/p4_1 admin stop`	Run `p4 admin stop` on instance 1
`/p4/common/bin/live_checkpoint.sh 1`	Take a checkpoint of the live database on instance 1
`/p4/common/bin/p4login 1`	Log in as the perforce user (superuser) on instance 1.

Some maintenance scripts can be run from any client workspace, if the user has administrative access to Perforce.

8.1.2. Monitoring SDP activities

The important SDP maintenance and backup scripts generate email notifications when they complete.

For further monitoring, you can consider options such as:

- Making the SDP log files available via a password protected HTTP server.
- Directing the SDP notification emails to an automated system that interprets the logs.

8.2. Upgrade Scripts

8.2.1. get_helix_binaries.sh

Usage

```
USAGE for get_helix_binaries.sh v1.2.0:

get_helix_binaries.sh [-r <HelixMajorVersion>] [-b <Binary1>,<Binary2>,...]

   or

get_helix_binaries.sh -h|-man

DESCRIPTION:
    This script acquires Perforce Helix binaries from the Perforce FTP server.

    The four Helix binaries that can be acquired are:

    * p4, the command line client
    * p4d, the Helix Core server
    * p4p, the Helix Proxy
    * p4broker, the Helix Broker

    This script gets the latest patch of binaries for the current major Helix
    version.  It is intended to acquire the latest patch for an existing install,
    or to get initial binaries for a fresh new install.  It must be run from
    the /hxdepots/sdp/helix_binaries directory (or simiar; the /hxdepots directory
    is the default but is subject to local configuration).

    The helix_binaries directory is used for staging binaries for later upgrade
    with the SDP 'upgrade.sh' script (documented separately).  This helix_binaries
    directory is used to stage binaries on the current machine, while the
    'upgrade.sh' script updates a single SDP instance (of which there might be
    several on a machine).

    The helix_binaries directory may not be in the PATH. As a safety feature,
    the 'verify_sdp.sh' will report an error if the 'p4d' binary is found outside
    /p4/common/bin in the PATH. The SDP 'upgrade.sh' check uses 'verify_sdp.sh'
    as part of its preflight checks, and will refuse to upgrade if any 'p4d' is
```



```
    found outside /p4/common/bin.

    When a newer major version of Helix binares is needed, this script should not
    be modified directly. Instead, the recommended approach is to upgrade the SDP
    to get the latest version of SDP first, which will included a newer version of
    this script, as well as the latest 'upgrade.sh'.  The 'upgrade.sh' script
    is updated with each major SDP version to be aware of any changes in
    the upgrade procedure for the corresponding p4d version.  Upgrading SDP first
    ensures you have a version of the SDP that works with newer versions of p4d
    and other Helix binaries.

OPTIONS:
 -r <HelixMajorVersion>
    Specify the Helix Version, using the short form.  The form is rYY.N, e.g. r20.1
    to denote the 2020.1 release. The default: is r20.1

 -b <Binary1>[,<Binary2>,...]
    Specify a comma-delimited list of Helix binaries. The default is: p4 p4d p4broker
p4p

 -n Specify the '-n' (No Operation) option to show the commands needed
    to fetch the Helix binaries from the Perforce FTP server without attempting
    to execute them.

 -D Set extreme debugging verbosity using bash 'set -x' mode.

HELP OPTIONS:
 -h Display short help message
 -man   Display this manual page

EXAMPLES:
    Note: All examples assume the SDP is in the standard location, /hxdepots/sdp.

    Example 1 - Typical Usage with no arguments:

    cd /hxdepots/sdp/helix_binaries
    ./get_helix_binaries.sh

    This acquires the latest patch of all 4 binaries for the r20.1
    release (aka 2020.1).

    Example 2 - Specifying the major version:

    cd /hxdepots/sdp/helix_binaries
    ./get_helix_binaries.sh -r r19.2

    This gets the latest patch of for the 2019.2 release of all 4 binaries.

    Note: Only supported Helix binares are guaranteed to be available from the
    Perforce FTP server.
```



```
    Note: Only the latest patch of any given binary is available from the Perforce
    FTP server.

    Example 3 - Sample getting r20.1 and skipping the proxy binary (p4p):

    cd /hxdepots/sdp/helix_binaries
    ./get_helix_binaries.sh -r r20.1 -b p4,p4d,p4broker

DEPENDENCIES:
    This script requires outbound internet access. Depending on your environment,
    it may also require HTTPS_PROXY to be defined, or may not work at all.

    If this script doesn't work due to lack of outbound internet access, it is
    still useful illustrating the locations on the Perforce FTP server where
    Helix Core binaries can be found.  If outbound internet access is not
    available, use the '-n' flag to see where on the Peforce FTP server the
    files must be pulled from, and then find a way to get the files from the
    Perforce FTP server to the correct directory on your local machine,
    /hxdepots/sdp/helix_binaries by default.

EXIT CODES:
    An exit code of 0 indicates no errors were encounted. An
    non-zero exit code indicates errors were encounterd.
```

8.2.2. upgrade.sh

The `upgrade.sh` script is used to upgrade `p4d` and other Perforce Helix binaries on a given server machine.

The links for different versions of `p4d` are described in Section A.1.3, “P4D versions and links”

Usage

```
USAGE for upgrade.sh v4.6.6:

upgrade.sh <instance> [-p|-I] [-M] [-c] [-n] [-L <log>] [-d|-D]

or

upgrade.sh [-h|-man]


DESCRIPTION:

This script upgrades the following Helix Core software:

* p4d, the Perforce Helix Core server
* p4broker, the Helix Broker server
* p4p, the Helix Proxy server
* p4, the command line client
```



```
Details of each upgrade are described below. Prior to executing any upgrades, a
preflight check is done to help ensure upgrades will go smoothly.  Also, checks
are done to determine what (if any) of the above software products need to be
updated.

To prepare for an upgrade, new binaries must be update in the /p4/sdp/helix_binaries
directory.  This is generally done using the get_helix_binaries.sh script in
that directory.  Binaries in this directory are not referenced by live running
servers, and so it is safe to upgrade files in this directory to stage for a
future upgrade at any time. Also, the SDP standard PATH does not include this
directory, as verified by the verify_sdp.sh script.

THE INSTANCE BIN DIR

The 'instance bin' directory, /p4/<instance>/bin, (e.g. /p4/1/bin for instance
1), is expected to contain *_init scripts for services that operate on the
given machine.

For example, a typical master machine for instance 1 might have the following
in /p4/1/bin:

* p4broker_1_init script
* p4broker_1 symlink
* p4d_1_init script
* p4d_1 symlink or script
* p4_1 symlink (a reference to the 'p4' command line client)

A server machine for instance 1 that runs only the proxy server would have the
following in /p4/1/bin:

* p4p_1_init script
* p4p_1 symlink
* p4_1 symlink

The instance bin directory is never modified by the 'upgrade.sh' script.
The addition of new binaries and update of symlinks occur in .

The existence of *_init scripts for any given binary determines whether this
script attempts to manage the service on a given machine, stopping it before
upgrades, restarting it afterward, and other processing in the case of p4d.

Note that Phase 2, adding new binaries and updating symlinks, will occur for
all binaries for which new staged versions are available, regardless of
whether they are operational on the given machine.

THE COMMON DIR

This script performs it operations in the SDP common bin dir, .

Unlike the instance bin directory, the  directory is expected
```

```
to be identical across all machines in a topology.  Scripts and symlinks
should always be the same, with only temporary differences while global
topology upgrades are in progress.

Thus, all binaries available to be upgraded will be upgraded in Phase 2, even
if the binary does not operate on the current machine. For example, if a new
version of 'p4p' binary is available, a new version will be copied to
 and symlink references updated there. However, the p4p binary will
not be stopped/started.

GENERAL UPGRADE PROCESS

This script determines what binaries need to be upgraded, based on what new
binaries are available in the /p4/sdp/helix_binaries directory compared to what
binaries
the current instance uses.

There are 5 potential phases. Which phase execute depend on the what binaries
are being upgraded.  The phases are:

* PHASE 1 - Establish a clean rollback point.
This phase executes on the master if p4d is upgraded.

* PHASE 2 - Install new binaries and update SDP symlinks in .
This phase executes for all upgrades.

* PHASE 3 - Stop services to be upgraded.
This phase executes for all upgrades involving p4d, p4p, p4broker.
Only a 'p4' client only upgrade skips this phase.

* PHASE 4 - Perforce p4d schema upgrades
This step involves the 'p4d -xu' processing. It executes if p4d is upgraded
to a new major version, and occurs on the master as well as all replicas/edge
servers. The behavior of 'p4d -xu' differs depending on whether the server is
the master or a replica.

This phase is skipped if upgrading to a patch of the same major version, as
patches do not require 'p4d -xu' processing.

* PHASE 5 - Start upgraded services.
This phase executes for all upgrades involving p4d, p4p, p4broker.
Only a 'p4' client only upgrade skips this phase.

SPECIAL CASE - To OR THRU P4D 2019.1

If you are upgrading from a version that is older than 2019.1, services
are NOT restarted after the upgrade in Phase 5, except on the master.
Services must be restarted manually on all other servers.

For these 'to-or-thru' 2019.1 upgrades, after ensuring all replicas/edges
are caught up (per 'p4 pull -lj'), shutdown all servers other than the
```

```
master.

Proceeding outer-to-inner, execute this script like so on all machines
except the master:
   1. Deploy new executables in /p4/sdp/helix_binaries
   2. Stop p4d.
   3. Run 'verify_sdp.sh -skip cron'; fix problems if needed until it reports clean.
   4. Run 'upgrade.sh -M' to update symlinks.
   5. Do the upgrade manually with:  p4d -xu
   6. Leave the server offline.

On the master, execute like this:
   1. Deploy new executables in /p4/sdp/helix_binaries
   2. Run 'verify_sdp.sh -skip cron'; fix problems if needed until it reports clean.
   3. upgrade.sh

When the script completes (it will wait for 'p4 storage' upgrades),
restart services manually after the upgrade in the 'inner-to-outer'
direction.  Restart services on replicas/edges going inner-to-outer

This procedure requiring extra steps is specific to 'to-or-thru' P4D 2019.1
upgrades.  For upgrades starting from P4D 2019.1 or later, things are simpler.

UPGRADES FOR P4D 2019.1+

For ugprades where the P4D start version is 2019.1 and going to any subsequent
version, run this script going outer-to-inner. On each machine, it leaves the
services online and running.  Going in the outer-to-inner direction an all
servers, do:
   1. Deploy new executables in /p4/sdp/helix_binaries
   2. Run 'verify_sdp.sh -skip cron'; fix problems if needed until it reports clean.
   3. upgrade.sh

UPGRADE PREPARATION

The steps for deploying new binaries to server amchines and running verify_sdp.sh
(and potentially correcting any issues it discovers) can and should be done before
the time or even day of any planned upgrade.

UPGRADING HELIX CORE - P4D

The p4d process, the Perforce Helix Core Server, is the center of the Perforce
Helix Universe, and the only server with a significant database component.
Most of the upgrade phases above are about performing the p4d upgrade.

This 'upgrade.sh' script requires that the 'p4d' service be running at the
beginning of processing if p4d is to be upgraded, and will abort if p4d is
not running.

ORDER OF UPGRADES
```



```
Any given Perforce Helix installation will have least one p4d master server, and
may have several other p4d servers deployed on different machines as replicas and
edge servers.  When upgrading multiple p4d servers for any given instance (i.e.
any given data set, with a unique set of changelist numbers and users), the order
in which upgrades are performed matters.  Upgrades must be done in "outer to
inner" order.

The master server, at the center of the topology, is the innermost server and
must be upgraded last. Any replicas or edge servers connected directly to the
master constitue the next outer circle.  These can be upgraded in any order
relative to each other, but must be done before the master and after any
replicas farther out from the master in the topology.  So this 'upgrade.sh'
script should be run first on the server machines that are "outermost" from
the master from a replication perspective, and moving inward. The last run is
done on the master server machine.

Server machines running only proxies and brokers do not have a strict order
dependency for upgrades. These are commonly done in the same "outer to inner"
methodology as p4d for process consistency rather than strict technical need.

See the SDP_Guide.Unix.html for more information related to performing global
topology upgrades.

MASTER JOURNAL ROTATIONS

This script helps minimize downtime for upgrades by taking advantage of the SDP
offline checkpoint mechanism.  Rather than wait for a full checkpoint, a journal
is rotated and replayed to the offline_db.  This typically takes very little
time compared to a checkpoint, reducing downtime needed for the overall upgrade.

When the master server is upgraded, two rotations of the master server's journal
occur during processing.  The first journal rotation occurs before any upgrade
processing occurs, i.e. before the new binaries are added and symlinks are
updated. This gives a clean rollback point.

Later, after the p4d has started and p4d performs its journaled upgrade
processing, a second journal rotation occurs in Phase 5. This second journal
rotation captures all upgrade-related processing in a seprate numbered journal.

UPGRADING HELIX BROKER

Helix Broker (p4broker) servers are commonly deployed on the same machine as a
Helix Core server, and can also be deployed on stand-alone machines (e.g.
deployed to a DMZ host to provide secure access outside a corporate firewall).

Helix Brokers configured in the SDP environment can use a default configuration
file, and may have other configurations. The default configuration is the done
defined in /p4/common/config/p4_N.broker.cfg (or a host-specific override file
if it exists named /p4/common/config/p4_N.broker.<short_hostname>.cfg).  Other
broker configurations may exist, such as a DFM (Down for Maintenance) broker
config /p4/common/config/p4_N.broker.dfm.cfg.
```

```
During upgrade processing, this 'uprade.sh' script only stops and restarts the
broker with the default configuration. Thus, if coordinating DFM brokers, first
manually shutdown the default broker and start the DFM brokers before calling
this script. This script will leave the DFM brokers running while adding the
new binaries and updating the symlinks.  (Note: Depending on how services
are configured, this DFM configuration might not survive a machine reboot.
typically the default broker will come online after a machine reboot).

This 'upgrade.sh' script will stop the p4broker service if it is running at the
beginning of processing.  If it was stopped, it will be restarted after the new
binaries are in place and symlinks are updated. If p4broker was not running at the
start of processing, new binaries are added and symlinks updated, but the
p4broker server will not be started.

UPGRADING HELIX PROXY

Helix Proxy (p4p) are commonly deployed on a machine by themselves, with no p4d
and no broker. It may also be run on the same machine as p4d.

This 'upgrade.sh' script will stop the p4p service if it is running at the
beginning of processing.  If it was stopped, it will be restarted after the new
binaries are in place and symlinks are updated. If p4p was not running at the
start of processing, new binaries are added and symlinks updated, but the p4p
server will not be started.

UPGRADING HELIX P4 COMMAND LINE CLIENT

The command line client, 'p4', is upgraded in Phase 2 by addition of new
binaries and updating of symlinks.

STAGING HELIX BINARIES

If your server can reach the Perforce FTP server over the public internet, a
script can be used from the /p4/sdp/helix_binaries directory to get the latest
binaries:

    $ cd /p4/sdp/helix_binaries
    $ ./get_helix_binaries.sh

If your server cannot reach the Perforce FTP server, perhaps due to outbound
network firewall restrictions or operating on an "air gapped" network,
use the '-n' option to see where Helix binaries can be acquired from:

    $ cd /p4/sdp/helix_binaries
    $ ./get_helix_binaries.sh -n

OPTIONS:
 <instance>
    Specify the SDP instance name to add.  This is a reference to the Perforce
    Helix Core data set. This defaults to the current instance based on the
```

```
    $SDP_INSTANCE shell environment variable. If the SDP shell environment is
    not loaded, this option is required.

 -p Specify '-p' to halt processing after preflight checks are complete,
    and before actual processing starts. By default, procesing starts
    immediately upon successful completion of prelfight checks.

 -I Specify '-I' to ignore preflight errors. Use of this flag is STRONGLY
    DISCOURAGED, as the preflight checks are essential to ensure a safe
    and smooth migration. If used, preflight checks are still done so
    their errors are recorded in the upgrade log, and then the migration
    will attempt to proceed.

    WARNING: This is an advanced option intended for use by or with the
    guidance of Perforce Support or Perforce Consulting.

 -M Specify '-M' if you plan to do a manual upgrade. With this option,
    only Phase 2 processing, adding new staged binaries and updating
    symlinks, is done by this script.

    WARNING: This is an advanced option intended for use by or with the
    guidance of Perforce Support or Perforce Consulting.

 -c Specify '-c' to execute a command to upgrade the Protections table
    comment format after the p4d upgrade, by using a command like:

        p4 protect --convert-p4admin-comments -o | p4 -s protect -i

    By default, this Protections table conversion is not performed.  In some
    environments with custom policies related to update of the protections
    table, this command may not work.

    The new style of comments and the '--convert-p4admin-comments' option
    was introduced in P4D 2016.1.

 -L <log>
    Specify the path to a log file, or the special value 'off' to disable
    logging.  By default, all output (stdout and stderr) goes to this file
    in the /p4/N/logs directory (where N is the SDP instance name):

    upgrade.p4_N.<datestamp>.log

    NOTE: This script is self-logging.  That is, output displayed on the
    screen is simultaneously captured in the log file.  Do not run this
    script with redirection operators like '> log' or '2>&1', and do not
    use 'tee.'

    Logging can only be disabled with '-L off' if the '-n' or '-p' flags
    are used. Disabling logging for actual upgrades is not allowed.

DEBUGGING OPTIONS:
```

```
 -n No-Op.  In No-Op mode, no actions that affect data or structures are
    taken.  Instead, commands that would be run are displayed.  This
    command can also be educational, showing various steps that will occur
    during an upgrade.

 -d     Increase verbosity for debugging.

 -D     Set extreme debugging verbosity, using bash '-x' mode. Also implies -d.

HELP OPTIONS:
 -h Display short help message
 -man   Display man-style help message

EXAMPLES:
    EXAMPLE 1: Typical Usage

    Typical usage is with just the SDP instance name as an argument, e.g.
    instance '1', and no other parameters, as in this example:

    $ cd /p4/common/bin
    $ ./upgrade.sh 1

    This executes the upgrade after successful completion of preflight checks,
    and aborts if preflight checks detected any issues.

    EXAMPLE 2: Preflight Only

    To see if an upgrade is needed for this instance, based on binaries
    staged in /p4/sdp/helix_binaries, use the '-p' flag to execute only the preflight
    checks, and disable logging, as in this example:

    $ cd /p4/common/bin
    $ ./upgrade.sh 1 -p -L off

    EXAMPLE 3: Simplified

    If the standard SDP shell environment is loaded, upgrade.sh will be in
    the path, so the 'cd' command to /p4/common/bin is not needed. Also,
    the SDP_INSTANCE shell environment variable will be defined, so the
    'instance' parameter can be dropped, with simply a call to the script
    needed:

    $ upgrade.sh

SEE ALSO:
    The /verify_sdp.sh script is used for preflight checks.

    The /p4/sdp/helix_binaries/get_helix_binaries.sh script acquires new binaries
    for upgrades.

    Both scripts sport the same '-h' (short help) and '-man' (full manual)
```

```
    usage options as this script.

LIMITATIONS:
    This script does not handle upgrades of 'p4dtg', Helix Swarm,
    Helix4Git, or any other software.
```

8.3. Core Scripts

The core SDP scripts are those related to checkpoints and other scheduled operations, and all run from `/p4/common/bin`.

If you `source /p4/common/bin/p4_vars <instance>` then the `/p4/common/bin` directory will be added to your $PATH.

8.3.1. p4_vars

The `/p4/common/bin/p4_vars` defines the SDP shell environment, as required by the Perforce Helix server. This script uses a specified instance number as a basis for setting environment variables. It will look for and open the respective p4_<instance>.vars file (see next section).

This script also sets server logging options and configurables.

It is intended to be used by other scripts for common environment settings, and also by users for setting the environment of their Bash shell.

Usage

```
source /p4/common/bin/p4_vars 1
```

See also: Section 3.3, “Setting your login environment for convenience”

8.3.2. p4_<instance>.vars

Defines the environment variables for a specific instance, including P4PORT etc.

This script is called by Section 8.3.1, “p4_vars” - it is not intended to be called directly by a user.

For instance `1`:

```
p4_1.vars
```

For instance `art`:

```
p4_art.vars
```

Location: /p4/common/config

8.3.3. p4master_run

The `/p4/common/bin/p4master_run` is a wrapper script to other SDP scripts. This ensures that the shell environment is loaded from `p4_vars` before executing the script. It provides a '-c' flag for silent operation, used in many crontab so that email is sent from the scripts themselves.

This is especially useful for calling scripts that do not set their own shell environment, such as Python or Perl scripts. Many of the bash shell scripts in the SDP set their own environment (by doing `source /p4/common/bin/p4_vars N` for their instance); those bash shell scripts do not need to be called with the `p4master_run` wrapper.

8.3.4. daily_checkpoint.sh

The `/p4/common/bin/daily_checkpoint.sh` script configured by default to run six days a week using crontab. The script:

- truncates the journal
- replays it into the `offline_db` directory
- creates a new checkpoint from the resulting database files
- recreates the `offline_db` databsae from the new checkpoint.

This procedure rebalances and compresses the database files in the `offline_db` directory.

These can be rotated into the live (`root`) databse, by the script Section 8.3.10, “refresh_P4ROOT_from_offline_db.sh”

Usage

```
/p4/common/bin/daily_checkpoint.sh <instance>
/p4/common/bin/daily_checkpoint.sh 1
```

8.3.5. recreate_offline_db.sh

The `/p4/common/bin/recreate_offline_db.sh` recovers the offline_db database from the latest checkpoint and replays any journals since then. If you have a problem with the offline database then it is worth running this script first before running Section 8.3.6, “live_checkpoint.sh”, as the latter will stop the server while it is running, which can take hours for a large installation.

Run this script if an error occurs while replaying a journal during daily checkpoint process.

This script recreates offline_db files from the latest checkpoint. If it fails, then check to see if the most recent checkpoint in the `/p4/<instance>/checkpoints` directory is bad (ie doesn’t look like the right size compared to the others), and if so, delete it and rerun this script. If the error you are getting is that the journal replay failed, then the only option is to run Section 8.3.6, “live_checkpoint.sh” script.

Usage

```
/p4/common/bin/recreate_offline_db.sh <instance>
/p4/common/bin/recreate_offline_db.sh 1
```

8.3.6. live_checkpoint.sh

The `/p4/common/bin/live_checkpoint.sh` is used to initalize the SDP `offline_db`. It must be run once, typically manually during initial installation, before any other scripts that rely on the `offline_db` can be used, such as `daily_checkpoint.sh` and `rotate_journal.sh`.

This script can also be used in some cases to repair the `offline_db` if it has has become corrupt, e.g. due to a sudden power loss while checkpoint processing was running.

Note that when a `live_checkpoint.sh` runs, the server will be unresponsive to users for a time. On a new installation this "hang time" will be imperceptible, but over time it can grow to minutes and eventually hours. The idea is that `live_checkpoint.sh` should be used only very sparingly, and is not scheduled as a routine operation.

This performs the following actions:

- Does a journal rotation, so the active P4JOURNAL file becomes numbered.
- Creates a checkpoint from the live database db.* files in the P4ROOT.
- Recovers the `offline_db` database from that checkpoint to rebalance and compress the files

Run this script when creating the server and if an error occurs while replaying a journal during the off-line checkpoint process.

Be aware it locks live database for the duration of the checkpoint which can take hours for a large installation (please check the `/p4/1/logs/checkpoint.log` for the most recent output of `daily_backup.sh` to see how long checkpoints take to create/restore).

Usage

```
/p4/common/bin/live_checkpoint.sh <instance>
/p4/common/bin/live_checkpoint.sh 1
```

8.3.7. p4verify.sh

The `/p4/common/bin/p4verify.sh` script verifies the integrity of the 'archive' files, all versioned files in your repository. This script is run by crontab on a regular basis, typically weekly.

It verifies both shelves and ordinary archive files

Any errors in the log file (e.g. `/p4/1/logs/p4verify.log`) should be handled according to KB articles:

- MISSING! errors from p4 verify

- BAD! error from p4 verify

If in doubt contact support@perforce.com

Our recommendation is that you should expect this to be without error, and you should address errors sooner rather than later. This may involve obliterating unrecoverable errors.

when run on replicas, this will also append the `-t` flag to the `p4 verify` command to ensure that MISSING files are scheduled for transfer. This is useful to keep replicas (including edge servers) up-to-date.

Usage

```
/p4/common/bin/p4verify.sh <instance>
/p4/common/bin/p4verify.sh 1
```

```
USAGE for  v5.3.1:

p4verify.sh [<instance>] [-nu] [-nr] [-ns] [-nS] [-a] [-recent] [-L <log>] [-v] [-D]

   or

p4verify.sh -h|-man

DESCRIPTION:

    This script performs a 'p4 verify' of all submitted and shelved versioned
    files in depots of all types except 'remote' and 'archive' type depots.

    If run on a replica, it schedules archive failures for transfer to the
    replica.

OPTIONS:
<instance>
    Specify the SDP instances.  If not specified, the SDP_INSTANCE
    environment variable is used instead.  If the instance is not
    defined by a parameter and SDP_INSTANCE is not defined, p4verify.sh
    exists immediately with an error message.

 -nu    Specify '-nu' (No Unload) to skip verification of the singleton depot
    of type 'unload' (if created).  The 'unload' depot is verified
    by default.

 -nr    Specify '-nr' (No Regular) to skip verification of regular submitted
    archive files.  The '-nr' option is not compatible with '-recent'.
    Regular submitted archive files are verified by default.

 -ns    Specify '-ns' (No Spec Depot) to skip verification of singleton depot
    of type 'spec' (if created). The 'spec' depot is verified by default.
```

```
 -nS    Specify '-nS' (No Shelves) to skip verification of shelved archive
    files, i.e. to skip the 'p4 verify -qS'.

 -a Specify '-a' (Archive Depots) to do verification of depots of type
    'archive'.  Depots of type 'archive' are not verified by default, as
    archive depots are often physicially removed from the server's
    storage subsystem for long-term cold storage.

 -recent
    Specify that only recent changelists should be verified.
    The $SDP_RECENT_CHANGES_TO_VERIFY variable defines how many
    changelists are considered recent; the default is 200.

    If the default is not appropriate for your site, add
    "export SDP_RECENT_CHANGES_TO_VERIFY" to /p4/common/config/p4_N.vars to
    change the default for an instance, or to /p4/common/bin/p4_vars to
    change it globally.  If $SDP_RECENT_CHANGES_TO_VERIFY is unset, the
    default is 200.

    When -recent is used, neither shelves nor files in the unload depot
    are verified.

 -v     Verbose.  Show output of verify attempts, which is suppressed by default.
    Setting SDP_SHOW_LOG=1 in the shell environment has the same effect as -v.

    The default behavior of this script is to generate no terminal outpout,
    but instead to write output into a log file -- see LOGGING below.  If
    '-v' is specified, the generated log is sent to stdout at the end of
    processing.  This flag is not recommended for routine cron operation or
    for large data sets.

 -L <log>
    Specify the log file to use.  The default is /p4/N/logs/p4verify.log

    Log rotation and old log cleanup logic does not apply to log files
    specified with -L.  Thus, using -L is not recommended for routine scheduled
    operation, e.g. via crontab.

 -D     Set extreme debugging verbosity.

HELP OPTIONS:
 -h Display short help message
 -man   Display man-style help message

EXAMPLES:
    This script is typically called via cron with only the instance
    parameter as an argument, e.g.:
    p4verify.sh N

LOGGING:
```

```
    This script generates no output by default.  All (stdout and stderr) is
    logged to /p4/N/logs/p4verify.log.

    The exception is usage errors, which result an error being sent to
    stderr followed usage info on stdout, followed by an immediate exit.

    If the '-v' flag is used, the contents of the log are displayed to
    stdout at the end of processing.

EXIT CODES:
    An exit code of 0 indicates no errors were encounted attempting to
    perform verifications, AND that all verifications attempted
    reported no problems.

    A exit status of 1 indicates that verifications could not be
    attempted for some reason.

    A exit status of 2 indicates that verifications were successfully
    performed, but that problems such as BAD or MISSING files
    were detected, or else system limits prevented verification.
```

8.3.8. p4login

The `/p4/common/bin/p4login` script is a convenience wrapper to execute a series of `p4 login` commands, using the administration password configured in `mkdirs.cfg` and subsequently stored in a text file: `/p4/common/config/.p4passwd .p4_<instance>.admin`.

Usage

```
USAGE for p4login v4.4.1:

p4login [<instance>] [-p <port> | -service] [-automation] [-all]

   or

p4login -h|-man

DESCRIPTION:

    In its simplest form, this script simply logs in P4USER to P4PORT
    using the defined password access mechanism.

    It generates a login ticket for the SDP super user, defined by
    P4USER when sourcing the SDP standard shell environment.  It is
    called from cron scripts, and so does not normally generate any
    output.

    If run on a replica with the -service option, the serviceUser defined
    for the given replica is logged in.
```



```
    The $SDP_AUTOMATION_USERS variable can be defined in
    /p4_N.vars. If defined, this should contain a
    comma-delimited list of automation users to be logged in when the
    -automation option is used.  A definition might look like:

    export SDP_AUTOMATION_USERS=builder,trigger-admin,p4review

    Login behaviour is affected by external factors:
    1. P4AUTH, if defined, affects login behavior on replicas.

    2. The auth.id setting, if defined, affects login behaviors (and
    generally simplifies them).

    3. The $SDP_ALWAYS_LOGIN variable.  If set to 1, this causes p4login
    to always execute a 'p4 login' command to generate a login ticket,
    even if a 'p4 login -s' test indicates none is needed.  By default,
    the login is skipped if a 'p4 login  -s' test indicates a long-term
    ticket is available that expires 31+days in the future.
    Add "export SDP_ALWYAYS_LOGIN=1" to /p4_N.vars to
    change the default for an instance, or to /p4/common/bin/p4_vars to
    change it globally.  If unset, the default is 0.

    4. If the P4PORT contains an ssl: prefix, the P4TRUST relationship
    is checked, and if necessary, a p4 trust -f -y is done to establish
    trust.

OPTIONS:
<instance>
    Specify the SDP instances.  If not specified, the SDP_INSTANCE
    environment variable is used instead.  If the instance is not
    defined by a parameter and SDP_INSTANCE is not defined, p4login
    exists immediately with an error message.

 -service
    Specify -service when run on a replica or edge server to login
    the super user and the replication service user.

    This option is not compatible with '-p <port>'.

 -p <port>
    Specify a P4PORT value to login to, overriding the default
    defined by P4PORT setting in the environment.  If operating
    on a host other than the master, and auth.id is set, this
    flag is ignored; the P4TARGET for the replica is used
    instead.

    This option is not compatible with '-service'.

 -automation
    Specify -automation to login external automation users defined
    by the $SDP_AUTOMATION_USERS variable.
```

```
 -v     Show ouptput of login attempts, which is suppressed by default.
    Setting SDP_SHOW_LOG=1 in the shell environment has the same
    effect as -v.

 -L <log>
    Specify the log file to use.  The default is /p4/N/logs/p4login.log

 -d     Set debugging verbosity.

 -D     Set extreme debugging verbosity.

HELP OPTIONS:
 -h Display short help message
 -man   Display man-style help message

EXAMPLES:
    1. Typical usage for automation, with instance SDP_INSTANCE defined
    in the environment by sourcing p4_vars, and logging in only the super
    user P4USER to P4PORT:
    source /p4/common/bin/p4_vars abc
    p4login

    Login in only P4USER to the specified port, P4MASTERPORT in this example:
    p4login -p $P4MASTERPORT

    Login the super user P4USER, and then login the replication serviceUser
    for the current ServerID:
    p4login -service

    Login external automation users (see SDP_AUTOMATION_USERS above):
    p4login -automation

    Login all users:
    p4login -all

    Or: p4login -service -automation

LOGGING:
    This script generates no output by default.  All (stdout and stderr) is
    logged to /p4/N/logs/p4login.log.

    The exception is usage errors, which result an error being sent to
    stderr followed usage info on stdout, followed by an immediate exit.

    If the '-v' flag is used, the contents of the log are displayed to
    stdout at the end of processing.

EXIT CODES:
    An exit code of 0 indicates a valid login ticket exists, while a
    non-zero exit code indicates a failure to login.
```


8.3.9. p4d_<instance>_init

Starts the Perforce server. Can be called directly or as describe in Section 3.2.2, "Configuring (Automatic) Service Start on Boot" - it is created by `mkdirs.sh` when SDP is installed.

Do not use directly if you have configured systemctl for systemd Linux distributions such as CentOS 7.x. This risks database corruption if `systemd` does not think the service is running when it actually is running (for example on shutdown systemd will just kill processes without waiting for them).

This script sources `/p4/common/bin/p4_vars`, then runs `/p4/common/bin/p4d_base` (Section 8.5.10, "p4d_base").

Usage

```
/p4/<instance>/bin/p4d_<instance>_init [ start | stop | status | restart ]
/p4/1/bin/p4d_1_init start
```

8.3.10. refresh_P4ROOT_from_offline_db.sh

The `/p4/common/bin/refresh_P4ROOT_from_offline_db.sh` script is intended to be used occasionally, perhaps monthly, quarterly, or on-demand, to help ensure that your live (`root`) database files are defragmented.

It will:

- stop p4d
- truncate/rotate live journal
- replay journals to offline_db
- switch the links between `root` and `offline_db`
- restart p4d

It also knows how to do similar processes on edge servers and standby servers or other replicas.

Usage

```
/p4/common/bin/refresh_P4ROOT_from_offline_db.sh <instance>
/p4/common/bin/refresh_P4ROOT_from_offline_db.sh 1
```

8.3.11. run_if_master.sh

The `/p4/common/bin/run_if_master.sh` script is explained in Section 8.3.14, "run_if_master/edge/replica.sh"

8.3.12. run_if_edge.sh

The `/p4/common/bin/run_if_edge.sh` script is explained in Section 8.3.14,

“run_if_master/edge/replica.sh”

8.3.13. run_if_replica.sh

The `/p4/common/bin/run_if_replica.sh` script is explained in Section 8.3.14, “run_if_master/edge/replica.sh”

8.3.14. run_if_master/edge/replica.sh

The SDP uses wrapper scripts in the crontab: `run_if_master.sh`, `run_if_edge.sh`, `run_if_replica.sh`. We suggest you ensure these are working as desired, e.g.

Usage

```
/p4/common/bin/run_if_master.sh 1 echo yes
/p4/common/bin/run_if_replica.sh 1 echo yes
/p4/common/bin/run_if_edge.sh 1 echo yes
```

It is important to ensure these are returning the valid results for the server machine you are on.

Any issues with these scripts are likely configuration issues with `/p4/common/config/p4_1.vars` (for instance 1)

8.4. More Server Scripts

These scripts are helpful components of the SDP that run on the server, but are not included in the default crontab schedules.

8.4.1. p4.crontab

Contains crontab entries to run the server maintenance scripts.

Location: /p4/sdp/Server/Unix/p4/common/etc/cron.d

8.4.2. verify_sdp.sh

The `/p4/common/bin/verify_sdp.sh` does basic verification of SDP setup.

Usage

```
USAGE for verify_sdp.sh v5.15.1:

verify_sdp.sh [<instance>] [-online] [-skip <test>[,<test2>,...]] [-si] [-L <log>|off
] [-D]

   or

verify_sdp.sh -h|-man
```

```
DESCRIPTION:

    This script verifies the current SDP setup for the specified instance,
    and also performs basic health checks of configured servers.

    This uses the SDP instance bin directory /p4/N/bin to determine
    what server binaries (p4d, p4broker, p4p) are expected to be configured
    on this machine.

    Existence of the '*_init' script indicates the given binary is
    expected. For example, for instance 1, if /p4/1/bin/p4d_1_init
    exists, a p4d server is expected to run on this machine.

    Checks may be executed or skipped depending on what servers are
    configured. For example, if a p4d is configured, the $P4ROOT/server.id
    file should exist. If p4p is configured, the 'cache' directory
    should exist.

OPTIONS:
 <instance>
    Specify the SDP instances.  If not specified, the SDP_INSTANCE
    environment variable is used instead.  If the instance is not
    defined by a parameter and SDP_INSTANCE is not defined,
    exits immediately with an error message.

 -online
    Online mode.  Does additional checks that require P4D to be online.

 -skip <test>[,<test2>,...]

    Specify a comma-delimited list of test names to skip.

    Valid test names:

    * crontab: Skip crontab check. Use this if you do not expect crontab to
    be configured, perhaps if you use a different scheduler.
    * excess: Skip checks for excess copies of p4d/p4p/p4broker in PATH.
    * license: Skip license related checks.
    * masterid: Skip check ensuring ServerID of master starts with 'master'.
    * offline_db: Skip checks that require a healthy offline_db.
    * p4root: Skip checks that require healthy P4ROOT db files.
    * p4t_files: Skip checks for existence of P4TICKETS and P4TRUST files.
    * version: Skip version checks.

    As an alternative to using the '-skip' command, the shell environment
    variable VERIFY_SDP_SKIP_TEST_LIST can be set to a comma-separated
    list of test names to skip.  Using the command line parameter is the
    best choice for temporarily skipping tests, while specifying the
    environment variable is better for making permanent exceptions (e.g.
    always excluding the crontab check if crontabs are not used at this
    site).  The variable should be set in /p4/common/config/p4_N.vars.
```

```
    If the '-skip' option is provided, the VERIFY_SDP_SKIP_TEST_LIST
    variable is ignored (not appended to). So it may make sense to
    reference the variable on the command line. For example, if the
    value of the variable is 'crontab', to skip crontab and license
    checks, you could specify:

    -skip $VERIFY_SDP_SKIP_TEST_LIST,license

 -si    Silent mode, useful for cron operation.  Both stdout and stderr
    are still captured in the log.  The '-si' option cannot be used
    with '-L off'.

 -L <log>
    Specify the log file to use.  The default is /p4/N/logs/verify_sdp.log
    The special value 'off' disables logging to a file.

    Note that '-L off' and '-si' are mutually exclusive.

 -D Set extreme debugging verbosity.

HELP OPTIONS:
 -h Display short help message
 -man   Display man-style help message

EXAMPLES:
    Example 1: Typical usage:

    This script is typically called after SDP update with only the instance
    name or number as an argument, e.g.:

    verify_sdp.sh 1

    Example 2: Skipping some checks.

    verify_sdp.sh 1 -skip crontab

    Example 3: Automation Usage

    If used from automation already doing its own logging, use -L off:

    verify_sdp.sh 1 -L off

LOGGING:
    This script generates a log file and also displays it to stdout at the
    end of processing.  By default, the log is:
    /p4/N/logs/verify_sdp.log.

    The exception is usage errors, which result an error being sent to
    stderr followed usage info on stdout, followed by an immediate exit.
```



```
    If the '-si' (silent) flag is used, the log is generated, but its
    contents are not displayed to stdout at the end of processing.

EXIT CODES:
    An exit code of 0 indicates no errors were encounted attempting to
    perform verifications, and that all checks verified cleanly.
```

8.5. Other Scripts and Files

The following table describes other files in the SDP distribution. These files are usually not invoked directly by you; rather, they are invoked by higher-level scripts.

8.5.1. backup_functions.sh

The `/p4/common/bin/backup_functions.sh` script contains Bash functions used in other SDP scripts.

It is **sourced** (`source /p4/common/bin/backup_functions.sh`) by other scripts that use the common shared functions.

It is not intendend to be called directly by the user.

8.5.2. broker_rotate.sh

The `/p4/common/bin/broker_rotate.sh` rotates the broker log file on an instance that only has the broker running.

It can be added to a crontab for e.g. daily log rotation.

Usage

```
/p4/common/bin/broker_rotate.sh <instance>
/p4/common/bin/broker_rotate.sh 1
```

8.5.3. edge_dump.sh

The `/p4/common/bin/edge_dump.sh` script is designed to create a seed checkpoint for an Edge server.

An edge server is naturally filtered, with certain database tables (e.g. db.have) excluded. In addition to implicit filtering, the server spec may specify additional tables to be excluded, e.g. by using the ArchiveDataFilter field of the server spec.

The script requires the SDP instance and the edge ServerID.

Usage

```
/p4/common/bin/edge_dump.sh <instance> <edge server id>
/p4/common/bin/edge_dump.sh 1 p4d_edge_syd
```

It will output the full path of the checkpoint to be copied to the edge server and used with Section 8.5.23, “recover_edge.sh”

8.5.4. edge_vars

The `/p4/common/bin/edge_vars` file is sourced by scripts that work on edge servers.

It sets the correct list db.* files that are edge-specific in the federated architecture. This version is dependent on the version of p4d in use; this script accounts for the P4D version.

It is not intended for users to call directly.

8.5.5. edge_shelf_replicate.sh

The `/p4/common/bin/edge_shelf_replicate.sh` script is intended to be run on an edge server and will ensure that all shelves are replicated to that edge server (by running `p4 print` on them).

Only use if directed to by Perforce Support or Perforce Consulting.

8.5.6. load_checkpoint.sh

The `/p4/common/bin/load_checkpoint.sh` script loads a checkpoint for commit/edge/replica instance.

Usage

```
USAGE for load_checkpoint.sh v2.3.6:

load_checkpoint.sh <checkpoint> [-i <instance>] [-s <ServerID>] [-c] [-l] [-r] [-b] [-
y] [-L <log>] [-si] [-v<n>] [-D]

or

load_checkpoint.sh [-h|-man|-V]


DESCRIPTION:
    This script loads a specified checkpoint into /p4/N/root and /p4/N/offline_db,
    where 'N' is the SDP instance name.

    At the start of processing, preflight checks are done. Preflight checks
    include:
    * The specified checkpoint and corresponding *.md5 file must exist.
    * The $P4ROOT/server.id file must exist, unless '-s' is specified.
    * The $P4ROOT/license file must exist, unless '-l' is specified.
    * Basic SDP structure and key files must exist.

    If the preflight passes, the p4d_N service is shutdown, and also the
    p4broker_N service is shutdown if configured.

    Next, the specified checkpoint is loaded. Upon completion, the Helix Core
    server process, p4d_N, is started.
```



```
    If the server to be started is a replica, the serviceUser configured for
    the replica is logged into the P4TARGET server.  Any needed 'p4 trust' and
    'p4 login' commands are done to enable replication.

    Note that this part of the processing will fail if the correct super user
    password is not stored in the standard SDP password file,

    /p4/common/config/.p4passwd.p4_N.admin

    After starting the server, a local 'p4 trust' is done if needed, and then
    a 'p4login -service -v' and 'p4login -v'.

    By default, the p4d_N service is started, but the p4broker_N service is not.
    Specify '-b' to restart both services.

ARGUMENTS AND OPTIONS:
 <checkpoint>
    Specify the path to the checkpoint file to load.

    The file may be a compressed or uncompressed checkpoint, and it may bea case
    sensitive or case-insensitive checkpoint.  The checkpoint file must have a
    corresponding *.md5 checksum file in the same directory, with one of two name
    variations: If the checkpoint file is /somewhere/foo.gz, the checksum file may
    be named /somewhere/foo.gz.md5 or /somewhere/foo.md5.

 -i <instance>
    Specify the SDP instance. This can be omitted if SDP_INSTANCE is already
    defined.

 -s <ServerID>
    Specify the ServerID.  This value is written into $P4ROOT/server.id file.

    If no $P4ROOT/server.id file exists, this flag is required.

    If the $P4ROOT/server.id file exists, this argument is not needed. If this
    '-s <ServerID>' is given and a $P4ROOT/server.id file exists, the value in
    the file must match the value specified with this argument.

 -c Specify that SSL certificates are required, and not to be generated with
    'p4d_N -Gc'.

    By default, if '-c' is not supplied and SSL certs are not availalbe, certs
    are generated automatically with 'p4d_N -Gc'.

 -l Specify that the server is to start without a license file. By default, if
    there is no $P4ROOT/license file, this script will abort.  Note that if '-l'
    is specified and a license file is actually needed, the attempt this script makes
    to start the server after loading the checkpoint will fail.

 -r Specify '-r' to replay only to P4ROOT.  By default, this script replays both
```

```
    to P4ROOT and the offline_db.

 -b Specify '-b' to start the a p4broker process (if configured).  By default
    the p4d process is started after loading the checkpoint, but the p4broker
    process is not. This can be useful to ensure the human administrator has
    an opportunity to do sanity checks before enabling the broker to allow
    access by end users (if the broker is deployed for this usage).

 -y Use the '-y' flag to bypass an interactive warning and confirmation
    prompt.

 -v<n>    Set verbosity 1-5 (-v1 = quiet, -v5 = highest).  The default is 5.

 -L <log>
    Specify the path to a log file.  By default, all output (stdout and stderr)
    goes to:
    /p4/<instance>/logs/load_checkpoint.<timestamp>.log

    NOTE: This script is self-logging.  That is, output displayed on the screen
    is simultaneously captured in the log file.  Do not run this script with
    redirection operators like '> log' or '2>&1', and do not use 'tee.'

 -si    Operate silently.  All output (stdout and stderr) is redirected to the log
    only; no output appears on the terminal.

 -D     Set extreme debugging verbosity.

HELP OPTIONS:
 -h Display short help message
 -man   Display man-style help message
 -V Dispay version info for this script and its libraries.

EXAMPLES:
    Sample non-interactive usage (bash syntax):
    nohup /load_checkpoint.sh /p4/1/checkpoints/p4_1.ckp.4025.gz -i 1 -y -si <
/dev/null > /dev/null 2>&1 &

    Then, monitor with:
    tail -f $(ls -t $LOGS/load_checkpoint.*.log|head -1)
```

8.5.7. gen_default_broker_cfg.sh

The `/p4/common/bin/gen_default_broker_cfg.sh` script generates an SDP instance-specific variant of the generic P4Broker config file. Display to standard output.

Usage:

```
cd /p4/common/bin
gen_default_broker_cfg.sh 1 > /tmp/p4broker.cfg.ToBeReviewed
```


The final p4broker.cfg should end up here:

```
/p4/common/config/p4_${SDP_INSTANCE}.${SERVERID}.broker.cfg
```

8.5.8. journal_watch.sh

The `/p4/common/bin/journal_watch.sh` script will check diskspace available to P4JOURNAL and trigger a journal rotation based on specified thresholds. This is useful in case you are in danger of running out of disk space and your rotated journal files are stored on a separate partition than the active journal.

This script is using the following external variables:

- SDP_INSTANCE - The instance of Perforce that is being backed up. If not set in environment, pass in as argument to script.
- P4JOURNALWARN - Amount of space left (K,M,G,%) before min journal space where an email alert is sent
- P4JOURNALWARNALERT - Send an alert if warn threshold is reached (true/false, default: false)
- P4JOURNALROTATE - Amount of space left (K,M,G,%) before min journal space to trigger a journal rotation
- P4OVERRIDEKEEPJNL - Allow script to temporarily override KEEPJNL to retain enough journals to replay against oldest checkpoint (true/false, default: false)

Usage

```
/p4/common/bin/journal_watch.sh <P4JOURNALWARN> <P4JOURNALWARNALERT> <P4JOURNALROTATE>
<P4OVERRIDEKEEPJNL (Optional)>
```

Examples

Run from CLI that will warn via email if less than 20% is available and rotate journal when less than 10% is available

```
./journal_watch.sh 20% TRUE 10% TRUE
```

Cron job that will warn via email if less than 20% is available and rotate journal when less than 10% is available

```
30 * * * * [ -e /p4/common/bin ] && /p4/common/bin/run_if_master.sh ${INSTANCE}
/p4/common/bin/journal_watch.sh ${INSTANCE} 20\% TRUE 10\% TRUE
```

8.5.9. kill_idle.sh

The `/p4/common/bin/kill_idle.sh` script runs `p4 monitor terminate` on all processes showing in the output of `p4 monitor show` that are in the IDLE state.

Usage

```
/p4/common/bin/kill_idle.sh <instance>
/p4/common/bin/kill_idle.sh 1
```

8.5.10. p4d_base

The `/p4/common/bin/p4d_base` script is the script to start/stop/restart the `p4d` instance.

It is called by `p4d_<instance>_init` script (and thus also `systemctl` on systemd Linux distributions). It is not intended to be called by users directly.

8.5.11. p4broker_base

The `/p4/common/bin/p4broker_base` script is very similar to Section 8.5.10, “p4d_base” but for the `p4broker` service instance.

See p4broker in SysAdmin Guide

8.5.12. p4ftpd_base

The `/p4/common/bin/p4ftpd_base` script is very similar to Section 8.5.10, “p4d_base” but for the `p4ftp` service instance. The p4ftp has been deprecated; this may be removed in a future SDP release.

This product is very seldom used these days!

See P4FTP Installation Guide.

8.5.13. p4p_base

The `/p4/common/bin/p4p_base` is very similar to Section 8.5.10, “p4d_base” but for the `p4p` (P4 Proxy) service instance.

See p4proxy in SysAdmin Guide

8.5.14. p4pcm.pl

The `/p4/common/bin/p4pcm.pl` script is a utility to remove files in the proxy cache if the amount of free disk space falls below the low threshold.

Usage

```
Usage:

   p4pcm.pl [-d "proxy cache dir"] [-tlow <low_threshold>] [-thigh <high_threshold>]
[-n]
or
   p4pcm.pl -h

This utility removes files in the proxy cache if the amount of free disk space
falls below the low threshold (default 10GB).  It removes files (oldest first)
until the high threshold is (default 20GB) is reached. Specify the thresholds
in kilobyte units (kb).

The '-d "proxy cache dir"' argument is required unless $P4PCACHE is defined,
in which case it is used.

The log is $LOGS/p4pcm.log if $LOGS is defined, else p4pcm.log in the current
directory.

Use '-n' to show what files would be removed.
```

8.5.15. p4review.py

The `/p4/common/bin/p4review.py` script sends out email containing the change descriptions to users who are configured as reviewers for affected files (done by setting the Reviews: field in the user specification). This script is a version of the `p4review.py` script that is available on the Perforce Web site, but has been modified to use the server instance number. It relies on a configuration file in `/p4/common/config`, called `p4_<instance>.p4review.cfg`.

This is not required if you have installed Swarm which also performs notification functions and is easier for users to configure.

Usage

```
/p4/common/bin/p4review.py  # Uses config file as above
```

8.5.16. p4review2.py

The `/p4/common/bin/p4review2.py` script is an enhanced version of Section 8.5.15, “p4review.py”

1. Run p4review2.py --sample-config > p4review.conf
2. Edit the file p4review.conf
3. Add a crontab similar to this:
   - * * * * python2.7 /path/to/p4review2.py -c /path/to/p4review.conf

Features:

- Prevent multiple copies running concurrently with a simple lock file.
- Logging support built-in.
- Takes command-line options.
- Configurable subject and email templates.
- Use P4Python when available and use P4 (the CLI) as a fallback.
- Option to send a *single* email per user per invocation instead of multiple ones.
- Reads config from a INI-like file using ConfigParser
- Have command line options that overrides environment variables.
- Handles unicode-enabled server **and** non-ASCII characters on a non-unicode-enabled server.
- Option to opt-in (--opt-in-path) reviews globally (for migration from old review daemon).
- Configurable URLs for changes/jobs/users (for swarm).
- Able to limit the maximum email message size with a configurable.
- SMTP auth and TLS (not SSL) support.
- Handles P4AUTH (optional; use of P4AUTH is no longer recommended).

8.5.17. p4sanity_check.sh

The `/p4/common/bin/p4sanity_check.sh` script is a simple script to run:

- p4 set
- p4 info
- p4 changes -m 10

Usage

```
/p4/common/bin/p4sanity_check.sh <instance>
/p4/common/bin/p4sanity_check.sh 1
```

8.5.18. p4dstate.sh

The `/p4/common/bin/p4dstate.sh` is a trouble-shooting script for use when directed by support, e.g. in situations such as server hanging, major locking problems etc.

It is an "SDP-aware" version of the standard p4dstate.sh so that it only requires the SDP instance to be specified as a parameter (since the location of logs etc are defined by SDP).

Usage

```
sudo /p4/common/bin/p4dstate.sh <instance>
sudo /p4/common/bin/p4dstate.sh 1
```

8.5.19. ps_functions.sh

The `/p4/common/bin/ps_functions.sh` libary file contains common functions for using 'ps' to check on process ids. It is not intended to be called by users.

```
get_pids ($exe)
```

Usage

```
Call with an exe name, e.g. /p4/1/bin/p4web_1
```

Examples

```
p4web_pids=$(get_pids $P4WEBBIN)
p4broker_pids=$(get_pids $P4BROKERBIN)
```

8.5.20. pull.sh

The `/p4/common/bin/pull.sh` is a reference pull trigger implementation for External Archive Transfer using pull-archive and edge-content triggers

It is a fast content transfer mechanism using Aspera (and can be adapted to other similar UDP based products.) An Edge server uses this trigger to pull files from its upstream Commit server. It replaces or augments the built in replication archive pull and is useful in scenarios where there are lots of large (binary) files and commit/edge are geographically distribbuted with high latency and/or low bandwidth between them.

See also companion trigger Section 8.5.28, “submit.sh”.

It is based around getting a list of files to copy from commit to edge, then doing the file transfer using `ascp` (Aspera file copy).

The configurable `pull.trigger.dir` should be set to a temp folder like `/p4/1/tmp`.

Startup commands look like:

```
startup.2=pull -i 1 -u --trigger --batch=1000
```

The trigger entry for the pull commands looks like this:

```
pull_archive pull-archive pull "/p4/common/bin/triggers/pull.sh %archiveList%"
```

There are some pull trigger options, but the are not necessary with Aspera. Aspera works best if you give it the max batch size of 1000 and set up 1 or more threads. Note, that each thread will use the max bandwidth you specify, so a single pull-trigger thread is probably all you will want.

The `ascp` user needs to have ssl public keys set up or export `ASPERA_SCP_PASS`.

The `ascp` user should be set up with the target as / with full write access to the volume where the depot files are located. The easiest way to do that is to use the same user that is running the p4d service.

ensure ascp is correctly configured and working in your environment: https://www-01.ibm.com/support/docview.wss?uid=ibm10747281 (search for "ascp connectivity testing")

Standard SDP environment is assumed, e.g P4USER, P4PORT, OSUSER, P4BIN, etc. are set, PATH is appropriate, and a super user is logged in with a non-expiring ticket.

Read the trigger comments for any customization requirements required for your environment.

See also the test version of the script: Section 8.5.21, “pull_test.sh”

See the `/p4/common/bin/triggers/pull.sh` script for details and to customize for your environment.

8.5.21. pull_test.sh

The `/p4/common/bin/pull_test.sh` script is a test script.

THIS IS A TEST SCRIPT - it substitutes for Section 8.5.20, “pull.sh” which uses Aspera’s `ascp` and replaces that with Linux standard `scp` utility. **IT IS NOT INTENDED FOR PRODUCTION USE!!!!**

If you don’t have an Aspera license, then you can test with this script to understand the process.

See the `/p4/common/bin/triggers/pull_test.sh` script for details.

There is a demonstrator project showing usage: https://github.com/rcowham/p4d-edge-pull-demo

8.5.22. purge_revisions.sh

The `/p4/common/bin/purge_revisions.sh` script will allow you to archive files and optionally purge files based on a configurable number of days and minimum revisions that you want to keep. This is useful if you want to keep a certain number of days worth of files instead of a specific number of revisions.

Note: If you run this script with purge mode disabled, and then enable it after the fact, all previously archived files specified in the configuration file will be purged if the configured criteria is met.

Prior to running this script, you may want to disable server locks for archive to reduce impact to end users.

See: https://www.perforce.com/perforce/doc.current/manuals/cmdref/Content/CmdRef/

configurables.configurables.html#server.locks.archive

Parameters:

- SDP_INSTANCE - The instance of Perforce that is being backed up. If not set in environment, pass in as argument to script.
- P4_ARCHIVE_CONFIG - The location of the config file used to determine retention. If not set in environment, pass in as argument to script. This can be stored on a physical disk or somewhere in perforce.
- P4_ARCHIVE_DEPOT - Depot to archive the files in (string)
- P4_ARCHIVE_REPORT_MODE - Do not archive revisions; report on which revisions would have been archived (bool - default: true)
- P4_ARCHIVE_TEXT - Archive text files (or other revisions stored in delta format, such as files of type binary+D) (bool - default: false)
- P4_PURGE_MODE - Enables purging of files after they are archived (bool - default: false)

Config File Format

The config file should contain a list of file paths, number of days and minimum of revisions to keep in a tab delimited format.

```
<PATH>    <DAYS>  <MINIMUM REVISIONS>
```

Example:

```
//test/1.txt    10  1
//test/2.txt    1   3
//test/3.txt    10  10
//test/4.txt    30  3
//test/5.txt    30  8
```

Usage

```
/p4/common/bin/purge_revisions.sh <SDP_INSTANCE> <P4_ARCHIVE_CONFIG>
<P4_ARCHIVE_DEPOT> <P4_ARCHIVE_REPORT_MODE (Optional)> 4_ARCHIVE_TEXT (Optional)>
<P4_PURGE_MODE (Optional)>
```

Examples

Run from CLI that will archive files as defined in the config file

```
./purge_revisions.sh 1 /p4/common/config/p4_1.p4purge.cfg archive FALSE
```

Cron job that will will archive files as defined in the config file, including text files

```
30 0 * * * [ -e /p4/common/bin ] && /p4/common/bin/run_if_master.sh ${INSTANCE}
/p4/common/bin/purge_revisions.sh $NSTANCE} /p4/common/config/p4_1.p4purge.cfg archive
FALSE FALSE
```

8.5.23. recover_edge.sh

The `/p4/common/bin/recover_edge.sh` script is designed to rebuild an Edge server from a seed checkpoint from the master while keeping the existing edge specific data.

You have to first copy the seed checkpoint from the master, created with Section 8.5.3, “edge_dump.sh”, to the edge server before running this script. (Alternately, a full checkpoint from the master can be used so long as the edge server spec does not specify any filtering, e.g. does not use ArchiveDataFilter.)

Then run this script on the Edge server host with the instance number and full path of the master seed checkpoint as parameters.

Usage

```
/p4/common/bin/recover_edge.sh <instance> <absolute path to checkpoint>
/p4/common/bin/recover_edge.sh 1 /p4/1/checkpoints/p4_1.edge_syd.seed.ckp.9188.gz
```

8.5.24. replica_cleanup.sh

The `/p4/common/bin/replica_cleanup.sh` script performs the following actions for a replica:

- rotate logs
- remove old checkpoints and journals
- remove old logs

This should be used on replicas for which the `sync_replica.sh` is not used.

Usage

```
/p4/common/bin/replica_cleanup.sh <instance>
/p4/common/bin/replica_cleanup.sh 1
```

8.5.25. replica_status.sh

The `/p4/common/bin/replica_status.sh` script is regularly run by crontab on a replica or edge (using Section 8.3.13, “run_if_replica.sh”).

```
0 8 * * * [ -e /p4/common/bin ] && /p4/common/bin/run_if_replica.sh ${INSTANCE}
/p4/common/bin/replica_status.sh ${INSTANCE} > /dev/null
0 8 * * * [ -e /p4/common/bin ] && /p4/common/bin/run_if_edge.sh ${INSTANCE}
/p4/common/bin/replica_status.sh ${INSTANCE} > /dev/null
```

It performs a `p4 pull -lj` command on the replica to report current replication status, and emails this to the standard SDP administrator email on a daily basis. This is useful for monitoring purposes to detect replica lag or similar problems.

If you are using enhance monitoring such as p4prometheus then this script may not be required.

Usage

```
/p4/common/bin/replica_status.sh <instance>
/p4/common/bin/replica_status.sh 1
```

8.5.26. request_replica_checkpoint.sh

The `/p4/common/bin/request_replica_checkpoint.sh` script is intended to be run on a standby replica. It essentially just calls 'p4 admin checkpoint -Z' to reqeust a checkpoint and exits. The actual checkpoint is created on the next journal rotation on the master.

Usage

```
/p4/common/bin/request_replica_checkpoint.sh <instance>
/p4/common/bin/request_replica_checkpoint.sh 1
```

8.5.27. rotate_journal.sh

The `/p4/common/bin/rotate_journal.sh` script is a convenience script to perform the following actions for the specified instance (single parameter):

- rotate live journal
- replay it to the `offline_db`
- rotate logs files according to the settings in `p4_vars` for things like `KEEP_LOGS`

It has several use cases:

- For sites with large, long-running checkpoints, it can be used to schedule journal rotations to occur more frequently than `daily_checkpoint.sh` is run.
- It can be used to trigger checkpoints to run on edge servers.

Usage

```
/p4/common/bin/rotate_journal.sh <instance>
/p4/common/bin/rotate_journal.sh 1
```

8.5.28. submit.sh

The `/p4/common/bin/submit.sh` script is an example submit trigger for External Archive Transfer using pull-archive and edge-content triggers

This is a reference edge-content trigger for use with an Edge/Commit server topology - the Edge server uses this trigger to transmit files which are being submitted to the Commit instead of using its normal file transfer mechanism. This trigger uses Aspera for fast file transfer, and UDP, rather than TCP and is typically much faster, especially with high latency connections.

Companion trigger/script to Section 8.5.20, “pull.sh”

Uses `fstat -Ob` with some filtering to generate a list of files to be copied. Create a temp file with the filename pairs expected by ascp, and then perform the copy.

This configurable must be set:

```
rpl.submit.nocopy=1
```

The edge-content trigger looks like this:

```
EdgeSubmit edge-content //... "/p4/common/bin/triggers/ascpSubmit.sh %changelist%"
```

The `ascp` user needs to have ssl public keys set up or export `ASPERA_SCP_PASS`. The `ascp` user should be set up with the target as / with full write access to the volume where the depot files are located. The easiest way to do that is to use the same user that is running the p4d service.

ensure `ascp` is correctly configured and working in your environment: https://www-01.ibm.com/support/docview.wss?uid=ibm10747281 (search for "ascp connectivity testing")

Standard SDP environment is assumed, e.g P4USER, P4PORT, OSUSER, P4BIN, etc. are set, PATH is appropriate, and a super user is logged in with a non-expiring ticket.

See the test version of this script below: Section 8.5.29, “submit_test.sh”

See the `/p4/common/bin/triggers/submit.sh` script for details and to customize for your environment.

8.5.29. submit_test.sh

The `/p4/common/bin/submit_test.sh` script is a test script.

THIS IS A TEST SCRIPT - it substitutes for Section 8.5.28, “submit.sh” (which uses Aspera) - and replaces `ascp` with Linux standard `scp`. IT IS NOT INTENDED FOR PRODUCTION USE!!!!

If you don’t have an Aspera license, then you can test with this script to understand the process.

See the `/p4/common/bin/triggers/submit_test.sh` for details.

There is a demonstrator project showing usage: https://github.com/rcowham/p4d-edge-pull-demo

8.5.30. sync_replica.sh

The `/p4/common/bin/sync_replica.sh` script is included in the standard crontab for a replica.

It runs `rsync` to mirror the `/p4/1/checkpoints` (assuming instance `1`) directory to the replica machine.

It then uses the latest checkpoint in that directory to update the local `offline_db` directory for the replica.

This ensures that the replica can be quickly and easily reseeded if required without having to first copy checkpoints locally (which can take hours over slow WAN links).

Usage

```
/p4/common/bin/sync_replica.sh <instance>
/p4/common/bin/sync_replica.sh 1
```

8.5.31. templates directory

This sub-directory of `/p4/common/bin` contains some files which can be used as templates for new commands if you wish:

- template.pl - Perl
- template.py - Python
- template.py.cfg - config file for python
- template.sh - Bash

They are not intended to be run directly.

8.5.32. update_limits.py

The `/p4/common/bin/update_limits.py` script is a Python script which is intended to be called from a crontab entry one per hour. It must be wrapped with the `p4master_run` script.

It ensures that all current users are added to the `limits` group. This makes it easy for an administrator to configure global limits on values such as MaxScanRows, MaxSearchResults etc. This can reduce load on a heavily loaded instance.

For more information:

- Maximising Perforce Helix Core Performance
- Multiple MaxScanRows and similar values

Usage

```
/p4/common/bin/update_limits.py <instance>
/p4/common/bin/update_limits.py 1
```

Appendix A: SDP Package Contents and Planning

The directory structure of the SDP is shown below in Figure 1 - SDP Package Directory Structure. This includes all SDP files, including documentation and sample scripts. A subset of these files are deployed to server machines during the installation process.

```
sdp
    doc
    Server (Core SDP Files)
        Unix
            setup (Unix-specific setup)
            p4
                common
                    bin (Backup scripts, etc)
                        triggers (Example triggers)
                    config
                    etc
                        cron.d
                        init.d
                        systemd
                    lib
                    test
    setup (cross platform setup - typemap, configure, etc)
    test (automated test scripts)
```

Figure 1 - SDP Package Directory Structure

A.1. Volume Layout and Server Planning

Figure 2: SDP Runtime Structure and Volume Layout, viewed from the top down, displays a Perforce *application* administrator's view of the system, which shows how to navigate the directory structure to find databases, log files, and versioned files in the depots. Viewed from the bottom up, it displays a Perforce *system* administrator's view, emphasizing the physical volume where Perforce data is stored.

A.1.1. Memory and CPU

Make sure the server has enough memory to cache the **db.rev** database file and to prevent the server from paging during user queries. Maximum performance is obtained if the server has enough memory to keep all of the database files in memory. While the p4d process itself is frugal with system resources such as RAM, it benefits from an excess of RAM due to modern operating systems using excess RAM as file I/O cache. This is to the great benefit of p4d, even though the p4d process itself may not be seen as consuming much RAM directly.

Below are some approximate guidelines for allocating memory.

- 1.5 kilobyte of RAM per file revision stored in the server.
- 32 MB of RAM per user.

INFO: When doing detailed history imports from legacy SCM systems into Perforce, there may be many revisions of files. You want to account for `(total files) x (average number of revisions per file)` rather than simply the total number of files.

Use the fastest processors available with the fastest available bus speed. Faster processors are typically more desirable than a greater number of cores and provide better performance since quick bursts of computational speed are more important to Perforce's performance than the number of processors. Have a minimum of two processors so that the offline checkpoint and back up processes do not interfere with your Perforce server. There are log analysis options to diagnose underperforming servers and improve things. Contact Perforce Support/Perforce Consulting for details.

A.1.2. Directory Structure Configuration Script for Linux/Unix

This script describes the steps performed by the mkdirs.sh script on Linux/Unix platforms. Please review this appendix carefully before running these steps manually. Assuming the three-volume configuration described in the Volume Layout and Hardware section are used, the following directories are created. The following examples are illustrated with "1" as the server instance number.

Directory	*Remarks*
`/p4`	Must be under root (`/`) on the OS volume
`/hxdepots/p4/1/bin`	Files in here are generated by the mkdirs.sh script.
`/hxdepots/p4/1/depots`	
`/hxdepots/p4/1/tmp`	
`/hxdepots/p4/common/config`	Contains p4_<instance>.vars file, e.g. `p4_1.vars`
`/hxdepots/p4/common/bin`	Files from `$SDP/Server/Unix/p4/common/bin`.
`/hxdepots/p4/common/etc`	Contains `init.d` and `cron.d`.
`/hxlogs/p4/1/logs/old`	
`/hxmetadata2/p4/1/db2`	Contains offline copy of main server databases (linked by `/p4/1/offline_db`.
`/hxmetadata1/p4/1/db1/save`	Used only during running of `refresh_P4ROOT_from_offline_db.sh` for extra redundancy.

Next, `mkdirs.sh` creates the following symlinks in the `/hxdepots/p4/1` directory:

Link source	***Link target***	***Command***
`/hxmetadata1/p4/1/db1`	`/p4/1/root`	`ln -s /hxmetadata1/p4/1/root`

Link source	*Link target*	*Command*
/hxmetadata2/p4/1/db2	/p4/1/offline_db	ln -s /hxmetadata1/p4/1/offline_db
/hxlogs/p4/1/logs	/p4/1/logs	ln -s /hxlogs/p4/1/logs

Then these symlinks are created in the /p4 directory:

Link source	*Link target*	*Command*
/hxdepots/p4/1	/p4/1	ln -s /hxdepots/p4/1 /p4/1
/hxdepots/p4/common	/p4/common	ln -s /hxdepots/p4/common /p4/common

Next, `mkdirs.sh` renames the Perforce binaries to include version and build number, and then creates appropriate symlinks.

A.1.3. P4D versions and links

The versioned binary links in `/p4/common/bin` are as below.

For the example of <instance> 1 we have:

```
ls -l /p4/1/bin
p4d_1 -> /p4/common/bin/p4d_1_bin
```

The structure is shown in this example, illustrating values for two instances, with instance #1 using p4d release 2018.1 and instance #2 using release 2018.2.

In /p4/1/bin:

```
p4_1 -> /p4/common/bin/p4_1_bin
p4d_1 -> /p4/common/bin/p4d_1_bin
```

In /p4/2/bin:

```
p4_2 -> /p4/common/bin/p4_2
p4d_2 -> /p4/common/bin/p4d_2
```

In `/p4/common/bin`:

```
p4_1_bin -> p4_2018.1_bin
p4_2018.1_bin -> p4_2018.1.685046
p4_2018.1.685046
```

```
p4_2_bin -> p4_2018.2_bin
p4_2018.2_bin -> p4_2018.2.700949
p4_2018.2.700949
```

```
p4d_1_bin -> p4d_2018.1_bin
p4d_2018.1_bin -> p4d_2018.1.685046
p4d_2018.1.685046
```

```
p4d_2_bin -> p4d_2018.2_bin
p4d_2018.2_bin -> p4d_2018.2.700949
p4d_2018.2.700949
```

The naming of the last comes from:

```
./p4d_2018.2.700949 -V
```

```
Rev. P4D/LINUX26X86_64/2018.2/700949 (2019/07/31).
```

So we see the build number `p4d_2018.2.700949` being included in the name of the p4d executable.

Although this link structure may appear quite complex, it is easy to understand, and it allows different instances on the same server host to be running with different patch levels, or indeed different releases. And you can upgrade those instances independently of each other which can be very useful.

A.1.4. Case Insensitive P4D on Unix

By default `p4d` is case sensitive on Unix for filenames and directory names etc.

It is possible and quite common to run your server in case insensitive mode. This is often done when Windows is the main operating system in use on the client host machines.

In "case insensitive" mode, that means that you should ALWAYS execute `p4d` with the flag `-C1` (or you risk possible table corruption in some circumstances).

The SDP achieves this by executing a simple Bash script:

```
#!/bin/bash
P4D=/p4/common/bin/p4d_${SDP_INSTANCE}_bin
# shellcheck disable=SC2016
exec $P4D -C1 "$@"
```

So the above will ensure that `/p4/common/bin/p4d_1_bin` (for instance `1`) is executed with the `-C1` flag.

As noted above, for case sensitive servers, `p4d_1` is normally just a link:

```
/p4/1/bin/p4d_1 -> /p4/common/bin/p4d_1_bin
```

Appendix B: The journalPrefix Standard

The Perforce Helix configurable `journalPrefix` determines where the active journal is rotated to when it becomes a numbered journal file during the journal rotation process. It also defines where checkpoints are created.

In the SDP structure, the `journalPrefix` is set so that numbered journals and checkpoints land on the `/hxdepots` volume. This volume contains critical digital assets that should be reliably backed up and should have sufficient storage for large digital assets such as checkpoints.

B.1. SDP Scripts that set `journalPrefix`

The SDP `configure_new_server.sh`, which applies SDP standards to fresh new `p4d` servers, sets the `journalPrefix` for the master server according to this standard.

The SDP `mkrep.sh` script, which creates new replicas, sets `journalPrefix for replicas according to this standard.

The SDP `mkdirs.sh` script, which initializes the SDP structure, creates a directory structure for checkpoints based on the journalPrefix.

B.2. First Form of `journalPrefix` Value

The first form of the `journalPrefix` value applies to the master servers's metadata set. This value is of this form, where `N` is replaced with the SDP instance name:

```
/p4/N/checkpoints/p4_N
```

If the SDP instance name is the default `1`, then files with a `p4_1` prefix would be stored in the `/p4/1/checkpoints` directory on the filesytem. Journal files in that directory would have names like `p4_1.320.jnl` and checkpoints would have names like `p4_1.320.ckp.gz`.

This `journalPrefix` value and the corresponding `/p4/1/checkpoints` directory should be used for the master server. It should also be used for any replica that is a valid failover target for the master server. This includes all *completely unfiltered* replicas of the master, such as `standby` and `forwarding-standby` replicas with a `P4TARGET` value referencing the master server.

A `standby` replica, also referred to as a `journalcopy` replica due to the underlying replication mechanisms, cannot be filtered. Standby replicas are commonly deployed for High Availability (HA) and Disaster Recovery (DR) purposes.

B.2.1. Detail on "Completely Unfitered"

A "completely unfiltered" replica is one in which:

- None of the `*DataFilter` fields in the replica's server spec are used

- The `p4 pull` command configured to pull metadata from the the replica's `P4TARGET` server, as defined in the replica's `startup.N` configurable, does not use filtering options such as `-T`.
- The replica is not an Edge server (i.e. one with a `Services` value in the server spec of `edge-server`.) Edge servers are filtered by their vary nature, as they exclude various database tables from being replicated.
- The replica's seed checkpoint was created without the `-P ServerID` flag to `p4d`. The `-P` flag is used when creating seed checkpoints for filtered replicas and edge servers.
- The replicas `P4TARGET` server references something other than the master server, such as an edge server.

B.3. Second Form of `journalPrefix` Value

A second form of the `journalPrefix` is used when the replica is filtered, including edge servers. The second form of the `journalPrefix` value incorporates a shortened form of the *ServerID* to indicate that the data set is specific to that *ServerID*. Because the metadata differs from the master, checkpoints for edge servers and filtered replicas are stored in a different directory, and use a prefix that identifies them as separate and divergent from the master's data set. This second form allows checkpoints from multipe edge servers or filtered replicas to be stored on an shared (e.g. NFS-mounted) `/hxdepots` volume.

The second form of journalPrefix is also used if the `/hxdepots` volume, on which checkpoints are stored, is shared (as indicated when the replicas `lbr.replication` value is set to a value of `shared`).

Filtered replicas are a strict subset of the master server's metadata. Edge servers filter some database tables from the master, but also have their own indepdent metadata (mainly workspace metadata) that varies from the master server and is potentially larger than the master's data set for some tables.

The "shortened form" of the *ServerID* removes the `p4d_` prefix (per the SDP Server Spec Naming Standard. So, for example an edge server with a *ServerID*` of `p4d_edge_uk` would use just the `edge_uk` portion of the *ServerID* in the `journalPrefix`, which would look like:

```
/p4/N/checkpoints.edge_uk/p4_N.edge_uk
```

If the SDP instance name is the default `1`, then files with a `p4_1.edge_uk` prefix would be stored in the `/p4/1/checkpoints.edge_uk` directory on the filesytem. Journal files in that directory would have names like `p4_1.edge_uk.320.jnl` and checkpoints would have names like `p4_1.edge_uk.320.ckp.gz`.

B.4. Scripts for Maintaining the `offline_db`

The following SDP scripts help maintain the `offline_db`:

- `daily_checkpoint.sh`: The `daily_checkpoint.sh` is used on the master server. When run on the master server, this script rotates the active journal to a numbered journal file, and then maintains the master's `offline_db` using the numbered journal file immediately after it is

rotated.

The `daily_checkpoint.sh` is also used on edge servers and filtered replicas. When run on edge servers and filtered replicas, this script maintains the replica's `offline_db` in a manner similar to the master, except that the journal rotation is skipped (as that can be done only on the master).

- `sync_replica.sh`: The SDP `sync_replica.sh` script is intended to be deployed on unfiltered replicas of the master. It maintains the `offline_db` by copying (via rsync) the checkpoints from the master, and then replays those checkpoints to the local `offline_db`. This keeps the `offline_db` of the replica current, which is good to have should the replica ever need to take over for the master.

INFO: For HA/DR and any purpose where replicas are not filtered, replicas of type `standby` and `forwarding-standby` should displace replicas of type `replica` and `forwarding-replica`.

B.5. SDP Structure and `journalPrefix`

On every server machine with the SDP structure where a `p4d` service runs (excluding broker-only and proxy-only hosts), a structure like the following should exist for each instance:

- A `/hxdepots/p4/N/checkpoints` directory
- In `/p4/N`, and symlink `checkpionts` that links to `/hxdepots/p4/N/checkpoints`, such that it can be referred to as `/p4/N/checkpoints`.

In addtion, edge servers and filtered replicas will also have a structure like the following for each instance that runs an edge server or filtered replica:

- A `/hxdepots/p4/N/checkpoints.ShortServerID` directory
- In `/p4/N`, and symlink `checkpionts.ShortServerID` that links to `/hxdepots/p4/N/checkpoints.ShortServerID`, such that it can be referred to as `/p4/N/checkpoints.ShortServerID`.

The SDP `mkdirs.sh` script, which sets up the initial SDP structure, initializes this structure on initial install.

B.6. Replicas of Edge Servers

As edge servers have unique data, they are commonly deployed with their own `standby` replica with a `P4TARGET` value referencing a given edge server rather than the master. This enables faster recovery option for the edge server.

As a special case, a `standby` replica of an edge server should have the same `journalPrefix` value as the edge server it targets. Thus, the *ServerID* baked into the journalPrefix of a replica of an edge is the ServerID of the target edge server, not the replica.

So for example, an edge server with a *ServerID* of `p4d_edge_uk` has a `standby` replica with a *ServerID* of `p4d_ha_edge_uk`. The journalPrefix of that edge should be the same as the edge server it targets, e.g.

```
/p4/1/checkpoints.edge_uk/p4_1.edge_uk
```

B.7. Goals of the `journalPrefix` Standard

Some design of goals this standard:

- Make it so the `/p4/N/checkpoints` folder is reserved to mean checkpoints created from the master server's full metadata set.
- Make the `/p4/N/checkpoints` folder be safe to rsync from the master to any machine in the topology (as may be needed in certain recovery situations for replicas and edge servers).
- Make it so the SDP `/hxdepots` volume can be NFS-mounted across multple SDP machines safely, such that two or more edge servers (or filtered replicas) could share versioned files, while writeing to separate checkpoints directories on a per-ServerID basis.
- Support all replication uses cases, including support for 'Workspace Servers', a name referring to a set of edge servers deployed in in the same location, typically sharing `/hxdepots` via NFS. Use of Workspace Servers can be used to scale Helix Core horizontally for massive user bases (typically several thousand users).

Appendix C: Server Spec Naming Standard

Perforce Helix server specs identify various Helix servers in a topology. Servers can be p4d servers (master, replicas, edges), p4broker, p4p, etc. This standard defines the standard for the server spec names.

C.1. General Form

The general form of a server spec name is:

```
<HelixServerTag>_<ReplicaTypeTag>[<N>]_<SiteTag>
```

C.1.1. Helix Server Tags

The HelixServerTag_ is one of:

- `p4d`: for a Helix Core server (including all distributed architecture usages such as master/replica/edge).
- `p4broker`: A Helix Broker
- `p4p`: A Helix Proxy
- `gconn`: Helix4Git (H4G) Connector
- `swarm`: Helix Swarm

As a special case, the *HelixServerTag* is omitted for the ServerID of the master server spec.

C.1.2. Replica Type Tags

The *ReplicaType* is one of:

- `master.<instance>`: The single master-commit server for a given SDP instance. SDP instance names are included in the ServerID for the master, as they intended to be unique within an enterprise. They must be unique to enable certain cross-instance sharing workflows, e.g. using remote depots and Helix native DVCS features.
- `ha`: High Availability. This indicates a replica that was specifically intended for HA purposes and for use with the `p4 failover` command. It further implies the following:
  - The Services field value is `standby`.
  - The `rpl.journalcopy.location=1` configurable is set, optimized for SDP deployment.
  - The replica is not filtered in any way: No usage of the `-T` flag to `p4 pull` in the replicas startup.*N* configurables, and no usage of `*DataFilter` fields in the server spec.
  - Versioned files are replicated (with an `lbr.replication` value of `readonly`).
  - An HA replica is assumed to be geographically near its P4TARGET server, which can be a master server or an edge server.

    - It may or may not use the `mandatory` option in the server spec. The `ha` tag does not indicate whether the `mandatory` option is used (as this is more transient thing not suitable for baking into a server spec naming standard).

- `ham`: A `ham` replica is the same as an `ha` replica except it does not replicate versioned files. Thus is a *metadata-only* replica that shares versioned files with its P4TARGET server (master or edge) with an `lbr.replication` value of `shared`.
- `fr`: Forwarding Replica (unfiltered) that replicates versioned files.
- `frm`: Forwarding replica (unfiltered) that shares versioned files with its target server rather than replicating them.
- `fs`: Forwarding Standby (unfiltered) that replicates versioned files. This is the same as an `ha` server, except that it is not necessarily expected to be physically near its P4TARGET server. This could be suited for Disaster Recovery (DR) purposes.
- `fsm`: Forwarding standby (unfiltered) that shares versioned files with its target server rather than replicating them. This is the same as a `ham`, except that it is not necessarily expected to be physically near its P4TARGET server.
- `ffr`: Filtered Forwarding Replica. This replica uses some of filtering, such as usage of `*DataFilter` fields of the server spec or `-T` flag to `p4 pull` in the replicas `startup.<N>` configurables. Filtered replicas are not viable failover targets, as the filtered data would be lost.
- `ro` - Read Only replica (unfiltered), replicating versioned files).
- `rom` - Read Only metadata-only replica (unfiltered, sharing versioned files).
- `edge` - Edge servers. (As edge servers are filtered by their nature, they are not valid failover targets).

C.1.2.1. Replication Notes

If a replica does not need to be filtered, we recommend using `journalcopy` replication, i.e. using a replica with a `Services:` field value of `standby` or `forwarding-standby`. Only use non-journalcopy replication when using filtered replicas (and edge servers where there is no choice).

Some general tips:

- The `ha`, `ham` replicas are preferred for High Availability (HA) usage.
- The `fs` and `ro` replicas are preferred for Disaster Recovery (DR) usage.
- Since DR implies the replica is far from its master, replication of archives (rather than sharing e.g. via NFS) may not be practical, and so `rom` replicas don't have common use cases.
- The `fr` type replica is obsolete, and should be replaced with `fs` (using `journalcopy` replication).

C.1.3. Site Tags

A `<SiteTag>` looks something like these samples:

```
syd: Sydney, Australia
bos: Boston, MA, USA
blr: Bangalore, India
```

Note that in the SDP, Site Tags are defined in the file `/p4/common/config/SiteTags.cfg`. S sample file is:

Example/Format

```
# Valid Geographic site tags.

# Each is intended to indciate a geography, and optionally a specific Data
# Center (or Computer Room, or Computer Closet) within a given geographic
# location.
#
# The format is:
# Name:Description
# The Name must be alphanumeric only. The Description may contain spaces.
# Lines starting with # and blank lines are ignored.

bej: Beijing, China
bos: Boston, MA, USA
blr: Bangalore, India
chi: Chicago greater metro area
cni: Chennai, India
pune: Pune, India
lv: Las Vegas, NV, USA
mlb: Melbourne, Australia
syd: Sydney, Australia
```

The site tag needs to distinguish the data centers used by a single enterprise, and so generally short tag names are appropriate.

Each site tag may be understood to be a true data center (Tier 1, Tier 2, etc.), a computer room, computer closet, or reserved space under a developer's desk. In some cases organizations will already have their own familiar site tags to refer to different sites or data centers; these can be used.

In public cloud deployments, the public cloud provider's region names can be used (e.g. `us-east-1`), or an internal short form (e.g. `awsnva1` for the AWS us-east-1 data center in Northern Virginia, USA.

As a special case, the `<SitgTag>`` is omitted for the master server spec.

C.2. Example Server Specs

Here are some sample server spec names based on this convention:

- `master.1`: A master server for SDP instance 1.

- `p4d_ha_chi`: A High Availability (HA) server, suitable for use with `p4 failover`, located in Chicago, IL.
- `p4d_ha2_chi`: A second High Availability server, suitable for use with `p4 failover`, located in Chicago, IL.
- `p4d_ffr_pune`: A filtered forwarding replica in Pune, India.
- `p4d_edge_blr`: An edge server located in Bangalore, India.
- `p4d_ha_edge_blr`: An HA server with P4TARGET pointing to the edge server in Bangalore, India.
- `p4d_edge3_awsnva`: A 3rd edge server in AWS data center in the us-east-1 (Northern Virginia) region.

C.3. Implications of Replication Filtering

Replicas that are filtered in any way are not viable candidate servers to failover to, because any filtered data would be lost.

C.4. Other Replica Types

The naming convention intentionally does not account for all possible server specs available with p4d. The standard accounts only for the distilled list of server spec types supported by the SDP `mkrep.sh` script, which are the most useful and commonly used ones.

C.5. The SDP `mkrep.sh` script

The SDP script `mkrep.sh` adheres to this standard. For more information on creating replicas with this script. See: Section 4.3.4, “Using mkrep.sh”.

Appendix D: Frequently Asked Questions/Troubleshooting

This appendix lists common questions and problems encountered by SDP users. Do not hesitate to contact consulting@perforce.com if additional assistance is required.

D.1. Journal out of sequence

This error is encountered when the offline and live databases are no longer in sync, and will cause the offline checkpoint process to fail. Because the scripts will replay all outstanding journals, this error is much less likely to occur. This error can be fixed by running the Section 8.3.6, “live_checkpoint.sh” script. Alternatively, if you know that the checkpoints created from previous runs of Section 8.3.4, “daily_checkpoint.sh” are correct, then restore the `offline_db` from the last known good checkpoint.

D.2. Unexpected end of file in replica daily sync

Check the start time and duration of the Section 8.3.4, “daily_checkpoint.sh” cron job on the master. If this overlaps with the start time of the Section 8.5.30, “sync_replica.sh” cron job on a replica, a truncated checkpoint may be rsync’d to the replica and replaying this will result in an error.

Adjust the replica’s cronjob to start later to resolve this.

Default cron job times, as installed by the SDP are initial estimates, and should be adjusted to suit your production environment.

Appendix E: Starting and Stopping Services

There are a variety of *init mechanisms* on various Linux flavors. The following describes how to start and stop services using different init mechanisms.

E.1. SDP Service Management with the systemd init mechanism

On modern OS's, like RHEL/CentOS 7/& 8, and Ubuntu 18.04 and 20.04, and SuSE 12 and 15, the `systemd` init mechanim is used. The underlying SDP init scripts are used, but they are wrapped with "unit" files in `/etc/systemd/system` directory, and called using the `systemctl` interface as `root` (typically using `sudo` while running as the `perforce` user).

On systems where systemd is used, **the service should only be started using the `sudo systemctl` command**, as in this example:

```
sudo systemctl status p4d_N
sudo systemctl start p4d_N
sudo systemctl status p4d_N
```

Note that there is no immediate indication from running the start command that it was actually successful, hence the status command is run immediately after. (If the start was unsuccessful, a good start to diagnostics would include running `tail /p4/N/logs/log` and `cat /p4/N/logs/p4d_init.log`).

The service should also be stopped in the same manner:

```
sudo systemctl stop p4d_N
```

Checking for status can be done using both the `systemctl` command, or calling the underlying SDP init script directly. However, there are cases where the status indication may be different. Calling the underlying SDP init script for status will always report status accurately, as in this example:

```
/p4/N/bin/p4d_N_init status
```

That works reliably even if the service was started with `systemctl start p4d_N`.

Checking status using the systemctl mechanis is done like so:

```
sudo systemctl start p4d_N
```

If this reports that the service is `active (running)`, such indication is relaible. However, the status indication may falsely indicate that the service is down when it is actually running. This will occur if the underlying init script was used to start the server rather than using `sudo systemctl start`

`p4d_N` as prescribed. The status indication will only indicate that the service is running if it was started using the systemctl mechanism.

Since `status` is unreliable with systemd, a reboot of the system without first manually shutting down the p4d process will not benefit from a graceful shutdown, and data corruption is possible. This issue is not specific to `p4d`. Any database application can suffer the same sort of corruption if not shutdown gracefully during a reboot.

To ensure no such corruption occurs, it is strongly recommended that the p4d service

E.1.1. Brokers and Proxies

In the above examples for starting, stoping, and status-checking of services using either the SysV or `systemd` init mechanisms, `p4d` is the sample service managed. This can be replaced with `p4p` or `p4broker` to manage proxy and broker services, respectively. For example, on a `systemd` system, the broker service, if configured, can be started like so:

```
sudo systemctl status p4broker_1
sudo systemctl start p4broker_1
sudo systemctl status p4broker_1
```

E.1.2. Root or sudo required with systemd

For SysV, having sudo is optional, as the underlying SDP init scripts can be called safely as `root` or `perforce`; the service runs as `perforce`.

If `systemd` is used, by default `root` access (often granted via `sudo`) is needed to start and stop the p4d service, effectively making sudo access required for the `perforce` user. The systemd "unit" files provided with the SDP handle making sure the underlying SDP init scripts start running under the correct operating sytem account user (typically `perforce`).

E.2. SDP Service Management with SysV init mechanism

On older OS's, like RHEL/CentOS 6, the SysV init mechanism is used. For those, you can the following example commands, replacing *N* with the actual SDP instance name

```
sudo service p4d_N_init status
```

The service can be checked for status, started and stopped by calling the underlying SDP init scripts as either `root` or `perforce` directly:

```
/p4/N/bin/p4d_N_init status
```

Replace `status` with `start` or `stop` as needed. It is common to do a `status` check immediately before

and after a `start` or `stop`.

During installation, a symlink is setup such that `/etc/init.d/p4d_N_init` is a symlink to `/p4/N/bin/p4_N_init`, and the proper `chkconfig` commands are run to register the application as a serivice that will be started on boot and gracefully shutdown on reboot.

On systems using SysV, calling the underlying SDP init scripts is safe and completely interchangeable with using the `service` command being run as `root`. That is, you can start a service with the underlying SDP init script, and the SysV init mechanism will still safely detect whether the service is running during a system shutdown, and thus will perform a graceful stop if p4d is up and running when you go to reboot. The status indication of the underlying SDP init script is absolutely 100% reliable, regardless of how the service was started (i.e. calling the init script directly as `root` or `perforce`, or using the `service` call as `root`.