ORACLE® USER PRODUCTIVITY KIT

UPGRADE

RELEASE 3.6.1 SERVICE PACK 1

PART NO. E17382-01

MARCH 2010

COPYRIGHT

CONTENTS

1. New Enhancements

Enhancements for 3.6
This version includes the following new enhancements to the Developer and the Player:

- Sound Recorder and Editor for Topics and Web Pages
- Topic Editor User Interface Improvements
- PowerPoint Presentation Output
- Document Auto-Recovery
- Inline Package Editing
- Suppress Linked Content in Outline Editor
- In-Application Support Help Configuration Tool
- Target Application Support Control
- Windowed See It! Mode
- Player Keyboard Navigation
- Suppress Bubbles in Player

These enhancements are designed to improve your efficiency in developing and publishing content for your audience.

The following pages provide a brief description of each enhancement as well as a reference to the documentation that describes the enhancement in detail. The remainder of this manual also provides instructions on how to successfully upgrade to 3.5.

Sound Recorder/Editor

In this release, Template Sound was removed and replaced with a more robust method of handling sound. The Developer now has full function sound recording and editing capabilities built into the Topic Editor. The Topic Editor contains the new Sound Editor pane. This pane contains all the controls necessary to record, import, export, and edit sound for topics and webpages.

Changes have been made to the Recorder to allow you to control the recording of sound while recording a topic. When the Recorder is configured for sound, sound recording icons display at the bottom of the Recorder. Additionally, if the Recorder is set to Automatically record screenshots, a Deskband can be configured to appear in the Taskbar with icons to control the sound recording. This is useful in this mode because the camera click that indicates a screenshot being taken is disabled. The Deskband displays a camera icon as a visual indicator when the screenshot is taken.

You can now add sound to your conceptual material by creating sound on a webpage and linking that webpage to the Concept pane of a Module, Section or Topic. Once linked, icons to control sound playback display on the Concept pane toolbar. When the content is published, similar icons display at the top of the Player so the end user can control the sound playback on the Player.

See Enhance Content with Sound in the *Content Development* manual for more information.

Topic Editor UI Improvements

The Topic Editor is now consistent with how other document editors function. For example, the Topic Editor now opens in a tab and provides dockable and sizable toolpanes for frame properties, the concept, the frame structure, and the sound editor. In addition, Undo/Redo functionality also now operates the same as in other document editors.

In addition, there have been changes to the menus and toolbars to make them consistent across all of the editors.

See Record and Edit Topic Content in the *Content Development* manual for more information.

PowerPoint Presentation Output

You can now publish content for a PowerPoint Presentation. This output creates a main page, which displays a table of contents page showing the outline with links to the concepts for modules and sections. A separate PowerPoint file is created for topic, and these can also be launched from links on the main page.

When you click a topic link, a PowerPoint presentation launches. You can then view the PowerPoint slideshow to navigate the topic in a static version of Try It! mode. Each frame is a separate slide in the presentation. The slide contains a graphic showing the screenshot, with the bubble text next to it. A box on the screenshot indicates the action area or areas for the frame. To navigate through the topic, you can either click in the action area or move to the next slide using standard PowerPoint methods. If a frame has attachments, the attachment icons will appear above the bubble text. You can click the icons to access the attachments, if the presentation is being viewed online. If the presentation is printed, the links are broken. Alternative Actions, Alternative Paths, and Decision frames are included as well, and links are provided to choose paths.

See the Presentation topic in the Publish Content section in the *Content Development* manual for more information.

Document Auto-Recovery

The AutoSave feature allow you to set the time interval the Developer uses to automatically create a temporary backup copy of any open document. If the Developer unexpectedly terminates while you are editing one or more documents, you may be able to recover all or part of the unsaved content. When you restart the Developer, the Recovered Documents dialog box lists any documents that have been recovered.

See Library Settings in the *Content Development* manual for more information.

Inline Package Editing

Previously, to edit the content of any document in a package, you had to copy the document to your computer, edit it, and then copy it back into the package. Now you can just open a package and double-click a document to launch it in its native editor.

See Edit Files in a Package in the Enhance Content with Packages sections in the *Content Development* manual for more information.

Suppress Linked Content in Outline Editor

You can now control the display of linked content as you navigate documents in the Outline Editor. This option is very useful if you have linked multimedia-based content that you do not want launch and play as you navigate through an outline. By default, any linked document in Concept pane displays as you click a document in the outline. However, you can turn off the display of all linked content or selectively turn off the display based on document type such as package, web page, and URL. If you turn off the display completely (by choosing the All option) or by document type, a message appears in the Concept pane of the Outline Editor telling you how to preview the content by clicking on the Concept pane toolbar.

See Preview Defaults in the Set Developer Defaults section in the *Content Development* manual for more information.

In-Application Support Configuration Tool

Player content published from this version of the Developer now has a Configuration Utility to help you make the appropriate settings to configure your content for SmartHelp or help integration. As you use the Configuration Utility to change and save settings, it creates a configuration file, writes the necessary lines of code, and saves it to the appropriate location.

See Configure the Content in the *In-Application Support Guide* manual for more information.

Target Application Context and Support

The Topic Recorder now displays the following different context icons depending on the active recognition mode. For example,

The ExactMatch context icon appears for all target applications.

The SmartMatch context icon appears for applications with SmartMatch recognition.

The NoMatch context icon appears when recording applications that do not have either ExactMatch or SmartMatch recognition.

A warning indicator may also appear next to the context indicator when one of the following situations is detected:

- When the Recorder determines that context recording is taking too long. Recording performance can be improved by disabling unused Target Applications.
- When the Recorder determines that you are recording against a disabled Target Application. Recording quality may be improved by enabling the Target Application you are recording. You may also need to recapture actions for other frames taken during this recording session.

Click on the currently displayed context icon (or warning icon) in the Recorder (or Autorecorder deskband) to configure target application support (or stop the recording and choose the Target Applications category in Tools, Options). You can use the Target Application Configuration dialog box to enable or disable target applications or enable just SmartMatch recognition. Eliminating target applications that you do not record can increase recording performance.

New Target Application Support
Siebel CRM On Premise: 8.0.0.5, 8.0.0.6, 7.8.2.10

Oracle Fusion

See Target Applications and Context Recognition in the Recorder in the *Content Development* manual for more information.

Windowed See It! Mode

The See It! playback mode can now be played in a window. This mode does not appear in the Player interface. It can only be launched through a link. The topic begins playing automatically when you launch it. There are buttons to control the playback at the bottom of the window.

See Play See It! Mode in a Window in the *Content Player* manual for more information about playing a topic. See also Launch Windowed See It! Mode in the *Content Deployment* manual for more information about launching it.

Player Keyboard Navigation

Additional keyboard navigations have been added to assist in navigating the Player interface.

You can now use the keyboard Arrow keys to navigate to documents in the outline. Use the left and right Arrow keys to expand and/or contract the outline. Use the up and down Arrow keys to navigation up and down the outline.

You can use the TAB key to toggle through the various links and graphic elements in each pane.

See Navigate Documents in the *Content Player* manual for more information.

Suppress Bubbles in Player

You can prevent the bubble from appearing during playback in See It! and Try It! modes. This allows you to create the equivalent of a PowerPoint slide show, and then record sound to narrate it if desired. In this case, a bubble on each "slide" would not be appropriate. You can hide the bubble on a frame-by-frame basis in the Topic Editor, or you can set a property for the entire topic.

See Hide the Bubble in the Edit Frame Properties section and Show Bubbles Property in the View Document Properties section in the *Content Development* manual for more information.

2. Upgrade from 2.5, 2.6, or 2.7

If you have version 2.5, 2.6, or 2.7 installed, you can upgrade to 3.6. You must install 3.6 in a new location; you cannot install it on top of the old version. The two versions can, therefore, exist on the same computer. See the Installation & Administration guide for instructions for installing 3.6.

After you install 3.6, you can convert the content from the old version. You can launch the conversion from either the Start screen or the Tools menu in the Library. See *Convert Content from a Previous Version* in the Content Development guide. This section contains information about how various items such as Infoblocks, keywords, roles, bubble sound and glossaries are converted. It also details what items are not converted, such as publishing styles and templates.

Usage Tracking

You cannot upgrade your Usage Tracking database. A new database is required, and you cannot convert data or reports from the previous version into the new version. In addition, a version 2 database cannot track data for a Player package published in 3.6.

3. Upgrade from 3.1.x, 3.5, or 3.5.1

If you have 3.1.x, 3.5, or 3.5.1 installed, you can easily upgrade to 3.6. You can upgrade the existing database and virtual directory, but you must install the web server in a new location.

Important Considerations Before Upgrading from 3.1.x

Before you upgrade, there are several things you should consider.

Publishing Styles
Since publishing styles typically change from version to version, please note the following:

- If you publish 3.6 content to a location that contains content published in 3.1.x, the published content will be overwritten.
- If you have created custom publishing styles in 3.1.x, they are not compatible in 3.6. Even if your customizations appear to still be available, you must delete them, recopy the appropriate styles from the publishing styles delivered with 3.6, and re-apply your customizations.
- Publishing settings files saved in 3.1.x will not work in 3.6.

If you plan to create custom publishing styles in any version, you should document your customization so you can easily re-apply them after you upgrade.

Templates
Standard templates will be replaced during the upgrade. Any new custom templates that you created in 3.1.x will work in the new version. However, if you are upgrading from 3.1.x to 3.6, we recommend that you perform a manual comparison of the old template and the new templates and re-apply any necessary changes.

Customized View Settings
Any custom settings to views, such as columns in the Detail view, will not be preserved.

Permissions
The Author permission will change to a group. All users with Administrator permissions will be added to the Administrator group. All authors and administrators will be added to the Everyone group.

Local Cache
If you have set a local cache size other than the default, you must reset it in the new version.

Important Considerations Before Upgrading from 3.5

Before you upgrade, there are several things you should consider.

Publishing Styles
Since publishing styles typically change from version to version, please note the following:

- If you publish 3.6 content to a location that contains content published in 3.5, the published content will be overwritten.
- If you have created custom publishing styles in 3.5, they are not compatible in 3.6. Even if your customizations appear to still be available, you must delete them,

recopy the appropriate styles from the publishing styles delivered with 3.6, and re-apply your customizations.

- Publishing settings files saved in 3.5 will not work in 3.6.

If you plan to create custom publishing styles in any version, you should document your customization so you can easily re-apply them after you upgrade.

Templates

Standard templates will be replaced during the upgrade. Any new custom templates that you created in 3.5 will work in the new version. However, if you are upgrading from 3.5 to 3.6, we recommend that you perform a manual comparison of the old template and the new templates and re-apply any necessary changes.

Customized View Settings

Any changes made to standard views will be preserved. Also, any custom views that you have created in 3.5 will be preserved.

Permissions

Permissions will be preserved.

Important Considerations Before Upgrading from 3.5.1

Before you upgrade, there are several things you should consider.

Publishing Styles

Since publishing styles typically change from version to version, please note the following:

- If you publish 3.6 content to a location that contains content published in 3.5, the published content will be overwritten.
- If you have created custom publishing styles in 3.5, they are not compatible in 3.6. Even if your customizations appear to still be available, you must delete them, recopy the appropriate styles from the publishing styles delivered with 3.6, and re-apply your customizations.
- Publishing settings files saved in 3.5 will work in 3.6.

If you plan to create custom publishing styles in any version, you should document your customization so you can easily re-apply them after you upgrade.

Templates

Standard templates will be replaced during the upgrade. Any new custom templates that you created in 3.5 will work in the new version. However, if you are upgrading from 3.5 to 3.6, we recommend that you perform a manual comparison of the old template and the new templates and re-apply any necessary changes.

Customized View Settings

Any changes made to standard views will be preserved. Also, any custom views that you have created in 3.5 will be preserved.

Permissions

Permissions will be preserved.

Upgrade a Single User Installation

The process for upgrading a single user installation varies, depending on the version of the software you are upgrading from. Be sure to follow the correct procedure below.

To upgrade from 3.1.x or 3.5:

1. Export your content with related documents to an .odarc file. Do NOT include the entire System folder with the content.
2. Within the System folder, you should only export the documents you have created, such as roles, custom icons, sound packages, and new templates. Do not export templates, Help Menu Integration packages, or publishing styles from the System folder that were installed when the Developer was installed. Do not export custom publishing styles. If you import these files into a newer version, you will have technical issues.
3. Export your content defaults, if you have customized them.
4. Follow the instructions in the *Installation & Administration* guide for a single user installation. Be sure to install the new version in a different location than the previous version.
5. After the new version is installed, start the Developer. The Profiles dialog box appears. Create a new profile to point to the new content location.
6. Import the content, roles, custom icons, sound packages, and new templates that you exported from the previous version.
7. Recreate any customized publishing styles, basing them on the styles installed for 3.6.

To upgrade from 3.5.1:

1. Follow the instructions in the *Installation & Administration* guide for a single user installation, and be sure to install the software in a different location.
2. Launch the 3.6 Developer. When you open your profile, you will be prompted to upgrade it. The content is copied into the new content location, and the content for the previous version, while still on your computer, can no longer be accessed with the profile.

Note: Once you have upgraded, you can uninstall 3.5.1 version through Add or Remove Software in Control Panel. You must delete the old content location manually through Windows Explorer.

Upgrade a Multi-User Installation

To upgrade a multi-user installation, you must first upgrade the server and the database. The content authors must then install the new version of the client, log in to connect to the library, and create a new profile.

Before you upgrade the database and the server, you should:

- Inform each author to check in all of their content and close the Developer.
- Make a backup of the database on the server.

Upgrade the Server

To upgrade the server and the database, you can run the setup program and select the existing virtual directory and database that contains your data. You can also manually update the database by running a script on the database server before you run the installer to upgrade the web server.

To upgrade the Oracle database manually and then upgrade the server:

1. Start SQL*Plus and login with the system account.
2. At the command prompt, enter the path to the **AlterSchemaObjects.sql** script located in **\db scripts\Oracle\Developer\Upgrade** in the software installation files. and append the following parameters:

   schema_owner - There is a limit of 20 characters on the schema owner name. You can find this information in the web.config file located in the Repository.WS in the folder where the server is installed.

   password - The existing schema owner password.

   Statement with generic parameters:

   @C:\AlterSchemaObjects.sql schema_owner password
3. Run the AlterSchemaObjects.sql script.

To upgrade the Microsoft SQL database manually and then upgrade the server:

1. Log in to the database using the database administrator account.
2. Open and edit the **AlterDBObjects.sql** file located in **\db scripts\MSSQL\Developer\Upgrade** in the software installation files.
3. Replace the ODServer text with the username used when the database was installed. You can find this information in the web.config file located in the Repository.WS folder in the folder where the server is installed.
4. Change the database from master to the name of the existing Developer database and run the **AlterDBObjects.sql** script.
   Note: The database name is the initial catalog in the connection string in the web.config file.

To upgrade the server with an Oracle database:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.
2. Choose the language to be used for the Install Wizard, if prompted, and click **OK** to display the Welcome screen.
   Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.
3. Click **Next** to display the Language Selection screen.
4. From the **Language** list, select the language for the Developer interface and Library and click **Next** to display the Setup Type screen.
5. From the **Configuration** list, select **Server** or **Server and Client**.
   Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to

continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.

6. Click **Next**. If you chose to install Server and Client, the Select Program Folder screen appears, and you can indicate the desired program folder or accept the default and click **Next** to display the Choose Destination Location screen. If you chose to install the server only, the Destination Location screen appears.
7. If desired, click the **Change** button to browse to a different folder than the default. Click **Next** to display the Choose Web Site screen.
8. Enter the same website information and authentication type that you used in the installation of the previous version and click **Next** to display the Virtual Directory Options screen.
9. Select the **Replace existing virtual directory** option and click **Next** to display the Database System screen.
10. Select the **Oracle Database** option and click **Next** to display the SQL Script Options screen.
11. If you have already run the scripts to upgrade the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option. Click **Next** to display the Oracle Database Login screen.
12. If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to upgrade the schema and the tablespace. If the scripts have already been run to upgrade the database, enter a user name, password and host string that has access to the user schema created to run the application. In this situation, when you click **Next**, the Tablespace Options screen appears (step 15).
13. Click **Next** to display the Choose Tablespace screen.
14. Enter the existing tablespace name, user name, and password and confirm the password. There is a limit of 20 characters on the user name. Click **Next** to display the Tablespace Options screen.
15. If the scripts have not been run, select the **Update tablespace** option. If the scripts have already been run, select the **Use existing database** option. Click **Next** to display the Profile Credentials screen.
16. If you chose to install the server with standard authentication, enter the existing user name and password for the admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Windows account or specify another valid Windows user account and password. Click **Next** to display the Ready to Install screen.
17. Click **Back** to change any settings, or click **Install**.
When the installation is complete, you may be prompted to restart your computer.
18. Click **Finish**.

To upgrade the server with a Microsoft SQL database:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.
2. Choose the language to be used for the Install Wizard, if prompted, and click **OK** to display the Welcome screen.
Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file

(usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.

3. Click **Next** to display the Language Selection screen.
4. From the **Language** list, select the language for the Developer interface and Library and click **Next** to display the Setup Type screen.
5. From the **Configuration** list, select **Server** or **Server and Client**.
   Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.
6. Click **Next**. If you chose to install Server and Client, the Select Program Folder screen appears, and you can indicate the desired program folder or accept the default and click **Next** to display the Destination Location screen. If you chose to install the server only, the Destination Location screen appears.
7. If desired, click the **Change** button to browse to a different folder than the default. Click **Next** to display the Choose Web Site screen.
8. Enter the same website information and authentication type that you used in the installation of the previous version and click **Next** to display the Virtual Directory Options screen.
9. Select the **Replace existing virtual directory** option and click **Next** to display the Database System screen.
10. Select the **Microsoft SQL Server** option and click **Next** to display the SQL Script Options screen.
11. If you have already run the scripts to upgrade the database, click the **Yes, the scripts have already been run for this version** option. In this situation, when you click **Next**, the Select Microsoft SQL Server screen appears. Select the database server where you installed the database, click **Next**, and the Choose Database screen appears (step 13). If you want the installer to upgrade the database, click the **No, the scripts have not been run, let the installer run them** option. Click **Next** to display the Microsoft SQL Server Login screen.
12. From the **Database server** list, select the Microsoft SQL server where the database is located. Select Microsoft Windows Authentication or SQL Server Authentication to connect to the database. If you select SQL Server authentication, enter an existing login name and password that has database administrator access to the server. Click **Next** to display the Choose Database screen.
13. Select the existing database and enter the credentials for the existing database user. Click **Next** to display the Database Options screen.
14. If the scripts have already been run, select the **Update database** option. If the scripts have been run, select the **Use existing database** option. Click **Next** to display the Profile Credentials screen.
15. If you chose to install the server with standard authentication, enter the existing user name and password for the admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Windows account or specify another valid Windows user account and password. Click **Next** to display the Ready to Install screen.
16. Click **Back** to change any settings, or click **Install**.
    When the installation is complete, you may be prompted to restart your computer.
17. Click **Finish**.

Upgrade the Client

To upgrade the Developer client, have each author run the setup program on the appropriate computers to install the client. Make sure you install the 3.6 Developer client in a **new** location that is different than the previous version.

When you launch the upgraded client for the first time, the Profiles dialog box appears. You must create a new profile.

Note: You will experience errors if you try to connect an upgraded Developer client to a server that has not been upgraded. The server should always be upgraded first.

Upgrade Usage Tracking

To upgrade Usage Tracking, follow the major steps listed below:

1. (Optional) Upgrade the Usage Tracking database using the database scripts supplied with the software.
2. Upgrade the Usage Tracking server.
3. Launch the Configuration page and update the settings.

If you are upgrading from a version prior to 3.5.1, you must republish the content in the new version and redeploy it in order for Usage Tracking to work correctly.

Upgrade the Usage Tracking Database Manually (Optional)

You can run scripts, supplied with the software, to upgrade the Usage Tracking server. To run these scripts, you will need administrator credentials for the database.

To upgrade the Usage Tracking database on an Oracle Database server using the script:

1. Log in to the database instance using the schema owner account. This is the account specified in the connection string in Usage Tracking.
2. Run the **AlterDBObjects.sql** located in the **\db\scripts\Oracle\UsageTracking\Upgrade** on the CD.
3. Log out of the tablespace.

To upgrade the Usage Tracking database on a Microsoft SQL Server using the script:

1. Log in to the Microsoft SQL server with database administrator rights.
2. Change the database from master to the name of the Usage Tracking database. Run the **AlterDBObjects.sql** script located in **\db scripts\MSSQL\UsageTracking\Upgrade** on the CD.
3. Log out of the Microsoft SQL server.

Upgrade the Usage Tracking Server

Run the installation program to upgrade the Usage Tracking server. You must install the new version to a different folder on the server. You can use the same virtual directory as the previous version.

To upgrade the Usage Tracking server:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.
2. Choose the language to be used for the Install Wizard and click **OK** to display the Welcome screen.
   Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.
3. Click **Next** to display the Language Selection screen.
4. From the **Language** list, select the language for the Developer interface and Library and click **Next** to display the Setup Type screen.
5. From the **Configuration** list, select **Usage Tracking**.
   Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.
6. Click **Next** to display the Choose Destination Location screen. If desired, click the **Change** button to browse to a different folder than the default. The new version must be installed in a different folder than the previous version.
7. Click **Next** to display the Choose Web Site screen.
8. From the **Available websites** list, select the website on which you want to install the Developer. Use the same virtual directory you used for the previous version. Microsoft Windows authentication is used for the virtual directory. Click **Next** to display the Virtual Directory Options screen.
9. Select the **Replace existing virtual directory** option and click **Next** to display the Database System screen.
10. Click the **Oracle Database** or the **Microsoft SQL Server** option and click **Next** to display the Usage Tracking Options screen.
11. Choose the **Upgrade existing** option and click **Next** to display the Ready to Install screen.
12. Click **Back** to change any settings, or click **Install**.
    When the installation is complete, you may be prompted to restart the server.
13. Click **Finish**.

Upgrade Configuration for Usage Tracking

During the upgrade process you must launch the Configuration page before launching the Usage Tracking Administration tool. You can access the configuration page by opening your browser and entering a URL that points to the default page within the virtual directory on the web server. For example, if the name of the web server is represented by <server_name> and the name of the virtual directory is ODSTrack, the URL would be http://<server_name>/ODSTrack/configuration/setup.aspx.

There are several steps for configuring the server, which must be performed in this order:

1. Change the database connection string to point to the existing database/tablespace. If you have not run the scripts manually to update the database, the user that you define in the connection string must have

administrator rights to the database so that the upgrade can be done. If the database has been upgraded with the scripts, the user only needs to have read and write permissions to the database.
Note: If you secured your UT installation in the previous release you should make sure to use the admin account so you can update the database. For Microsoft SQL, the user must have db_owner rights. For Oracle database, use the system user, not the "_app" user . Example: use ODServer instead of ODServer_app.

2. Change the configuration password (optional), set the authentication options for the users, create an Admin user (Forms authentication only), and save the setup.
3. Build the database. If you have run the scripts manually to upgrade the database, building the database does NOT run the scripts again. Other tasks are performed, such as upgrading the encryption of the passwords and rescanning the content to be sure that the table of contents is up to date. If you have not run the scripts, this process also upgrades the database.
4. Re-apply security. Please execute the "SecureUT.sql" script if using Microsoft SQL Server or "CreateAppUser.sql" script if using Oracle (only do this if you have not done this step from the previous release). The scripts will apply security permissions to existing accounts (Microsoft SQL Server) or create the an "_app" user account to further enhance security.

To configure Usage Tracking with an Oracle database:

1. Make sure everyone is logged out of Usage Tracking Administration, and that no one is actively using the content being tracked.
2. Open your browser and launch the Configuration Utility. Enter a URL that points to the configuration page within the virtual directory on the web server. For example, if the name of the web server is <servername> and the name of the virtual directory is Tracking, the URL would be http://<servername>/Tracking/configuration/setup.aspx.
3. On the **Step 1 (Configuration)** page, Enter a content directory path and content directory name, and select the authentication method for the users.
4. Enter a new connection string. You can find the database name, user ID, and password information in the web.config file located in the folder where the previous version of Usage Tracking is installed. The user ID and password in the connection string must have schema owner rights if you have not already upgraded the database using the scripts.
5. Test the connection. If the connection is OK, save the configuration.
6. On the **Step 2 (Build database)** page, click **Build Database**. Data that exists in the database will remain and can still be used in reports.
7. Click **Load Reports**.
8. Start SQL*Plus and login with the system account.
   Note: If you are upgrading from 3.5.1, the user account already exists in the database and you do not need to run this script again. You can go to step 11 to continue.
9. At the command prompt, enter the path to the **CreateAppUser.sql** script located in **\db scripts\Oracle\UsageTracking** in the software, and append the following parameters.

   schema_owner - This is the User ID account you specified in the connection string. A schema user account will be created based on this name, with _app appended. There is a limit of 20 characters on the schema owner name.

   password - This is the password you specified in the connection string. This will also be the password for the schema user account, which is created automatically.

Statement with generic parameters:
@C:\CreateAppUser.sql schema_owner password

10. Run the **CreateAppUser.sql** script.
11. On the configuration page, edit the Database connection string and replace the User ID with the schema user you just created.
    Example:
    Data Source=orcl; User Id=UTServer_app; Password=password;
12. Test the connection. If the connection is OK, save and close the configuration utility. You do not need to build the database again, as indicated in the message.

    Note: If you are upgrading from version 3.5 or previous, republish the content in the new version of the Developer and redeploy it to the Usage Tracking server. If you are upgrading from 3.5.1, you do not need to republish the content.

To configure Usage Tracking with a Microsoft SQL database:

1. Make sure everyone is logged out of Usage Tracking Administration, and that no one is actively using the content being tracked.
2. Open your browser and launch the Configuration Utility. Enter a URL that points to the configuration page within the virtual directory on the web server. For example, if the name of the web server is <servername> and the name of the virtual directory is Tracking, the URL would be http://<servername>/Tracking/configuration/setup.aspx.
3. On the **Step 1 (Configuration)** page, Enter a content directory path and content directory name, and select the authentication method for the users.
4. Enter a new connection string. You can find the database name in the web.config file located in the folder where the previous version of Usage Tracking is installed. The user ID and password in the connection string must have administrator rights if you have not already upgraded the database using the scripts.
5. Test the connection. If the connection is OK, save the configuration.
6. On the **Step 2 (Build database)** page, click **Build Database**. Data that exists in the database will remain and can still be used in reports.
7. Click **Load Reports**.
8. Log in to the Microsoft SQL Server with the database administrator account.
   Note: If you are upgrading from 3.5.1, the user account has already been secured. You edit the connection string to use this account and skip to step 11.
9. Edit the **SecureUT.sql** file located in **\db scripts\MSSQL\UsageTracking** in the soft ware. Replace the ODServer text with the user ID you specified in the connection string.
10. Change the database from master to the name of the Usage Tracking database and run the **SecureUT.sql** script.
11. Log out of the database and go back to the configuration page.
12. Test the connection. If the connection is OK, save the setup if necessary and close the configuration utility.

    Note: If you are upgrading from version 3.5 or previous, republish the content in the new version of the Developer and redeploy it to the Usage Tracking server. If you are upgrading from 3.5.1, you do not need to republish the content.

4. Migrate to an Oracle Database

You have the option to use either Microsoft SQL or Oracle Database. However, there is no direct conversion from a Microsoft SQL database to an Oracle Database, so you will need to migrate your content manually. Please note that the following data will be lost as a result of migrating to Oracle Database:

- User accounts
- Document history
- State values and State value assignments (to documents)
- Assigned to values

Follow these recommended steps to migrate content manually to an Oracle Database:

1. Upgrade your current installation to 3.5.1 on the Microsoft SQL server using the steps outlined above. Make sure that all authors have upgraded their client installations as well. This allows the system to update all of the standard styles and templates in the same environment. You will still need to update your customized publishing styles later.
2. Within the Developer, export all documents in the library into several .odarc files, including the System folder. This allows you to replicate your environment from the Microsoft SQL server to the Oracle Database server.
3. Export the content defaults.
4. Install a new instance of 3.5.1 with an Oracle Database server following the instructions in the *Installation & Administration* guide for installing a server. You can use the procedure to install the server and database at the same time, or you can follow the procedures for installing the Oracle Database first and then installing the server with an existing Oracle Database. When you install, make sure that you install to a new location and virtual directory.
5. Have the authors create a new profile to log in to the new installation. If you are not using Windows authentication for the authors, log in to the new installation as an administrator and create user accounts for the authors.
6. Within the Developer, import the .odarc files you created in step 2 into the Oracle Database. Since you are importing .odarc files, you can overwrite the documents without causing technical issues.
7. Import the content defaults (step 3).
8. Re-apply any customizations to the publishing styles, basing them on the styles for 3.5.1.