

Oracle® Health Sciences WebSDM and Empirica Study

Upgrade Instructions

Release 3.1.2.1 for Windows 2003/2008 Server

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2003/2008 Server

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Preface

This guide describes tasks that a system administrator performs to apply the WebSDM 3.1.2.1 patch update to an existing WebSDM 3.1.2 installation on a Windows 2003 or Windows 2008 server. If you are running a version of the WebSDM and Empirica Study applications prior to version 3.1.2, contact Oracle for assistance because you must upgrade to version 3.1.2 before performing this upgrade procedure.

Audience

This guide is for system administrators or database administrators who are familiar with Oracle relational databases and who host the WebSDM and Empirica Study application in their own environments, rather than contracting for this service from Oracle.

Note: In this guide, the product name WebSDM refers to both the WebSDM standalone product and WebSDM with the optional Empirica Study features, which are licensed separately.

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Related Documents

For more information, see the following documents in the Oracle Health Sciences WebSDM and Empirica Release 3.1.2.1 documentation set:

- *Oracle® Health Sciences WebSDM and Empirica Study Known Issues*
- *Oracle® Health Sciences WebSDM and Empirica Study Release Notes*
- *Oracle® Health Sciences WebSDM and Empirica Study Installation Instructions*
- *Oracle® Health Sciences WebSDM and Empirica Study Third Party Licenses and Notices*

Conventions

Oracle recommends that you familiarize yourself with the procedures in this guide by reading all instructions before you begin the upgrade.

While the instructions in this guide are detailed, they are generic. This guide does not address all variations that might occur. An experienced administrator should read all instructions and be prepared to work through site-specific differences from the provided text.

The following text conventions are used in this document:

Convention	Meaning
monospace font	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
boldface font	User interface controls, including menu options, buttons, and links.
<text_in_angle_brackets>	Substitute the values in the Prerequisites tables for the <text_in_angle_brackets>.
Optional	A procedure or step that is not required for all installations.
Note:	Information of particular significance.
<u>32-bit server</u>	Server-specific alternative instructions.
<u>64-bit server</u>	

Introduction

An application server that hosts multiple instances of WebSDM or other Empirica products might not be suitable to support an upgrade to the WebSDM and Empirica Study 3.1.2.1 applications. If your environment fits this profile, contact Oracle for assistance.

This guide assumes that you are familiar with administrative tasks such as setting up and configuring the Oracle database, administering IIS, configuring Windows Services, and setting Windows file permissions.

1.1 Removing and Setting the Read-only Attribute

If the installation instructions require you to edit a file, check whether the read-only attribute is set. If the read-only attribute is set, you must remove it before editing.

1. Open Windows Explorer and navigate to the file.
2. Right-click the file name and select **Properties**.
3. Clear **Read-only**.
4. Click **OK**.

When you finish editing the file, set the read-only attribute:

1. Open Windows Explorer and navigate to the file.
2. Right-click the file name and select **Properties**.
3. Select **Read-only**.
4. Click **OK**.

1.2 Saving Files

If the installation instructions require you to edit a file, be sure to save the file with the original name. Some editors add the TXT extension to the file name by default.

Upgrade to WebSDM 3.1.2.1

This chapter contains information on upgrading to WebSDM 3.1.2.1.

2.1 Prerequisites

You must have the following information when you start the upgrade. In these procedures, the values are shown in <text_in_angle_brackets>.

- The installation media for WebSDM 3.1.2.1
The product ZIP file from My Oracle Support (<https://support.oracle.com>).
- Windows administrator account
<win_admin_acct> and <win_admin_pass>
Windows account and password on the server where WebSDM is installed. The account must have the Administrator role.
- Installation root
<root>
File system root where the \Lincoln subdirectory is located, typically C:\.
- WebSDM instance name
<instance>
Name of the WebSDM 3.1.2 instance you are upgrading.
- WebSDM Superuser account and password. For example, the admin username supplied with WebSDM is a Superuser.
<app_admin_acct> and <app_admin_pass>
Password for the WebSDM user account with the reserved name **admin**, or other Superuser.
Note whether the WebSDM application server is 32-bit or 64-bit.
Note the operating system version running on the WebSDM server (Windows 2003 or Windows 2008).
- WebSDM Windows user account
<win_user_acct>
Name of the Windows account that is running the WebSDM service. Usually this is the WebSDM instance name, with the suffix, _app, appended. For example, **websdm_app**.

You must also have access to the Java jar and jarsigner utilities, and to your company's jar signing process.

2.2 Stop the WebSDM Service

1. Log into WebSDM as <app_admin_acct>.
2. Click **Settings**, and then click **View Currently Logged in Users**.
3. If sessions in addition to your own are running, either instruct the users to finish their sessions or cancel the sessions from the WebSDM interface.
4. Exit WebSDM.
5. Log into the Windows administrator account using <win_admin_acct>.
6. Select **Start > Administrative Tools > Services**.
7. Right-click the <instance> service, and then click **Stop**.
8. Right-click **World Wide Web Publishing Service**, and then click **Stop**.
9. Navigate to the <root>\Lincoln\apps\<instance>\bin folder.
10. Do one of the following:
 - (Windows 2008 server)-Right-click the uninstall_service.bat file, and select **Run as administrator**.
 - (Windows 2003 server) -Double-click the uninstall_service.bat file.

2.3 Modify the Tomcat and JDK Configurations

1. Back up the <root>\Lincoln folder.
2. Locate the Lincoln.zip file on the installation media. (For a 64-bit server, use Lincoln_x64.zip.)
3. Extract the contents of this file to a temporary folder, making sure that path names stored in the archive will be used (for example, in WinZip, the **Use folder names** checkbox must be selected).
4. Copy the apache-tomcat-6.0.41 folder from the temporary folder to the <root>\Lincoln folder.
5. Delete the \apache-tomcat-6.0.36 folder under <root>\Lincoln.
6. Update the JDK:
 - a. Delete the jdk1.x folder under <root>\Lincoln\.
 - b. Locate the jdk1.6 folder in the temporary folder, and copy the folder to the <root>\Lincoln folder.
7. Delete all the files from the <root>\Lincoln\apps\<instance>\bin folder.
8. Copy all the files from the temporary \Lincoln\apps\<instance>\bin folder into <root>\Lincoln\apps\<instance>\bin folder.

2.4 Upgrade the WebSDM Software

1. Locate the <root>\Lincoln\apps\<instance>\webapps\web_root folder on the server that is running your current installation of WebSDM. Copy the contents of this folder to a temporary folder, such as C:\temp\web_root.

2. Delete the contents of the <root>\Lincoln\apps\<instance>\webapps\web_root folder, keeping the folder itself in place.
3. Locate the websdm-3_1_2_1_4xx.zip file (where 4xx represents a specific build number) on the installation media. Extract the contents of this file to the <root>\Lincoln\apps\<instance>\webapps\web_root directory, making sure that path names stored in the archive are used (for example, in WinZip the **Use folder names** checkbox must be selected).
4. Restore your saved copy of website.properties, and of license.config, if it exists, from the temporary folder C:\temp\web_root\WEB-INF\classes\ to <root>\Lincoln\apps\<instance>\webapps\web_root\WEB-INF\classes.
5. Restore your saved copy of ojdbc*.jar (either ojdbc6.jar or ojdbc14.jar) from the temporary folder C:\temp\web_root\WEB-INF\lib\ to <root>\Lincoln\apps\<instance>\webapps\web_root\WEB-INF\lib.
6. If you have created or included any custom content (home pages or logos), copy the files from the \customhomes or \image subfolder under C:\temp\web_root\ to the respective subfolder under <root>\Lincoln\apps\<instance>\webapps\web_root.
7. Delete the contents of the <root>\Lincoln\apps\<instance>\work folder.

2.5 Reinstall the WebSDM Service

This section contains information on reinstalling the WebSDM Service on Windows 2003 and 2008 configurations.

2.5.1 Reinstall the WebSDM Service for Windows 2008

This section is for Windows 2008 Server only.

1. Delete the existing Windows user account that is running the WebSDM service.
 - a. Select **Start > Administrative Tools > Server Manager > Configuration > Local Users and Groups > Users**.
 - b. Right-click the account named <win_user_acct> (usually <instance>_app) that is running the WebSDM service.
 - c. Click **Delete**, and then click **Yes** to confirm.
2. Close **Administrative Tools**.
3. Navigate to the <root>\Lincoln\apps\<instance>\bin folder.
4. If you are using a WebSDM instance name other than **websdm**:
 - a. Edit the uninstall_service.bat file.
 - b. Change the value of SERVICE_NAME from **websdm** to the value of <instance>.
 - c. Save your changes.
 - d. Edit the install_service.bat file.
 - e. Change the value of SERVICE_NAME from **websdm** to the value of <instance>.
 - f. Change the value of the APPLICATION_DIR from **websdm** to the value of <instance>.

- f. Change the value of the APPLICATION_DIR from **websdm** to the value of <instance>.
 - g. Save your changes.
4. Double-click the install_service.bat file.
5. After install_service.bat has completed, inspect the transcript to ensure that no errors occurred. When you are finished, press any key.
6. Close the Command window.
7. Right-click the server's desktop **My Computer** icon and select **Manage**. Expand **System Tools > Local Users and Groups > Users**.
8. Right-click <instance>_app, and select **Set Password**.
9. In the **Set Password for <instance>_app** dialog box, click **Proceed**.
10. Change the password, using the password policy restrictions at your site, and click **OK**.
11. Expand the **Services and Applications** directory, and then click **Services**.
12. Right-click the <instance> service, and select **Properties**.
13. On the **Log On** tab, click **This account**. Clear the password fields, and enter the password you just changed.
14. On the **Recovery** tab, select **Restart the Service** for both **First Failure** and **Second Failure**.
15. Click **OK**.

2.6 Add Manifest Entries and Sign JAR Files

Modify the WebSDM JAR files to enable users to work with DataMontage graphs in applet mode. If you do not perform this procedure:

- Security-related dialog boxes appear when users work with DataMontage graphs in applet mode.
- DataMontage might be blocked by a client machine's security settings.

Before you begin, verify that:

- The PATH variable on the application server includes the jdk1.6\bin directory.
 - You have access to the Java jar and jarsigner utilities in the jdk1.6\bin directory.
 - You have access to your company's JAR signing process.
1. From the <root>:\Lincoln\apps\<instance>\webapps\web_root\AppJars\DataMontage23\ folder, copy the lti.jar and DataMontage.jar files to a temporary folder such as C:\temp\UpdateJarManifest\.
 2. Update the manifest in both JAR files:
 - a. In the temporary folder where you copied the JAR files, create the following text files.
 - AddToDMjar.txt
 - AddToLTIjar.txt
 - b. In a text editor, insert the following lines in the AddToDMjar.txt file.


```
Caller-Allowable-Codebase: *
```

Codebase: *

Note: You must include a carriage return after the last line.

- c. In a text editor, insert the following lines in the `AddToLTIjar.txt` file.

```
Application-Library-Allowable-Codebase: *.example.com
Caller-Allowable-Codebase: *.example.com
Codebase: *.example.com
```

where *example.com* is the domain name or IP address where the Empirica Study application is hosted. For more information, see <https://docs.oracle.com/javase/8/docs/technotes/guides/deploy/manifest.html>

Note: You must include a carriage return after the last line.

- d. Save and close the text files.
- e. In a Windows command window, navigate to the temporary folder containing the JARs and text files.
- f. At the prompt, issue the following commands:

```
jar -ufm DataMontage.jar AddToDMjar.txt
jar -ufm lti.jar AddToLTIjar.txt
```

3. Sign the modified JAR files using your company's JAR signing process.

If the process includes using Java's `jarsigner` utility, see <http://docs.oracle.com/javase/7/docs/technotes/tools/windows/jarsigner.html> for information about the utility.

4. Copy both signed JAR files to the
<root>:\Lincoln\apps\<instance>\webapps\web_root\AppJars\DataMontage23\ folder, replacing the original files.
5. Copy only the signed `DataMontage.jar` file to the
<root>:\Lincoln\apps\<instance>\webapps\web_root\WEB-INF\lib\ folder, replacing the original file.

You do not need a copy of `lti.jar` in this folder.

2.7 Set File Permissions

1. Navigate to the <root>\Lincoln\apps\<instance>\bin folder.
2. Use a text editor to open the file `set_permissions.bat` and review the values of `SERVICE_NAME`, `INSTALL_ROOT` and `APPLICATION_DIR`, and `WORKING_DIR`:
 - a. If the value of <instance> is other than **websdm**, change the values of `SERVICE_NAME`, `APPLICATION_DIR`, and `WORKING_DIR` to the value of <instance>.
 - b. If the value of <root> is other than the C drive, change the value of the `INSTALL_ROOT` to the value of <root>.

- c. If the **D** drive is not an acceptable location for the working directory, change the drive for `WORKING_DIR` to an acceptable drive.
 - d. Verify that `CATALINA_HOME` is defined correctly.
3. Optionally, grant permissions to a Windows group of non-administrator users who might require access to the log files and `\web_root` folder.
 - a. While editing the `set_permissions.bat` file, locate the following lines:


```
REM -
REM - Local Administrators group
REM -
REM SET ADMIN_GROUP=Study Operators
```
 - b. Remove `REM` from the `REM SET ADMIN_GROUP` line.
 - c. Replace `Study Operators` with the Windows user group that requires access.
4. If changes are needed, edit, save, and close the file.
5. When you are prompted, press any key.
6. Examine the log file `<root>\Lincoln\apps\<instance>\logs\set_permissions.log` for errors. If errors occur, you must take ownership, recursively, of `C:\Lincoln\apps\<instance>` and `D:\websdm`, and then repeat this procedure.
7. Do one of the following:
 - (Windows 2003 server) -Double-click the `set_permissions.bat` file.
 - (Windows 2008 server) -Right-click the `set_permissions.bat` file, and then select **Run as administrator**.

2.8 Start Instance

1. Select **Start > Administrative Tools > Services**.
2. Right-click the `<instance>` service, and then select **Start**.
3. Right-click the **World Wide Web Publishing Service**, and then click **Start**. If the service is already running, click **Restart**.
4. In an Internet Explorer window, access the URL for WebSDM.
5. If you receive a message that the server is still initializing, wait a few minutes and access the URL again.

2.9 Set Site Options and Restart Listener

1. Log into WebSDM as `<app_admin_acct>`.
2. Click **Settings**.
3. Click **Set Site Options**.
4. Set **System Version Description** to **Version 3.1.2.1**.
5. Click **Save**.
6. Click **Continue**.
7. Click **Restart Listener**.
8. Log out.

2.10 Verify the WebSDM Upgrade

For Upgrade Qualification (UQ) and Operational Qualification (OQ) testing, see the UQ_Test.doc and OQ_Test.doc files on the installation media.