



How Products Become Profits™

Agile® e6.0

Agile e6.0.1

Upgrade Guide from e6.0 to e6.0.1

Copyrights and Trademarks

Copyright © 1992-2005 Agile Software Corporation. All rights reserved.

You shall not create any derivative works of this publication nor shall any part of this publication be copied, reproduced, distributed, published, licensed, sold, stored in a retrieval system or transmitted in any form or by any means: electronic, mechanical, photocopying, or otherwise, without the prior written consent of Agile Software Corporation, 6373 San Ignacio Avenue, San Jose, California 95119-1200 U.S.A.; Telephone 408.284.4000, Facsimile 408.284.4002, or <<http://www.agile.com/>>.

The material in this document is for information only and is subject to change without notice. While reasonable efforts have been made in the preparation of this document to ensure its accuracy, Agile Software Corporation assumes no liability resulting from errors or omissions in this document or from the use of the information contained herein. Agile Software Corporation reserves the right to make changes in the product design without reservation and without notification to its users.

Agile e6 is a registered trademark. All other brands or product names are trademarks or registered trademarks of their respective holders.

Java and Solaris are registered trademarks of Sun Corporation.

Microsoft, Microsoft Windows, Microsoft Word, Microsoft Excel, Internet Explorer and SQL Server are registered trademarks of Microsoft Corporation.

Oracle and Oracle10g are registered trademarks of Oracle Corporation.

NOTICE OF RESTRICTED RIGHTS:

The Software is a “commercial item,” as that term is defined at 48 C.F.R. 2.101 (OCT 1995), consisting of “commercial computer software” and “commercial computer software documentation” as such terms are used in 48 C.F.R. 12.212 (SEPT 1995) and when provided to the U. S. Government, is provided (a) for acquisition by or on behalf of civilian agencies, consistent with the policy set forth in 48 C.F.R. 12.212; or (b) for acquisition by or on behalf of units of the Department of Defense, consistent with the policies set forth in 48 C.F.R. 227.7202-1 (JUN 1995) and 227.7202-4 (JUN 1995).

November 21, 2005

CONTENTS

| | |
|---|-----------|
| Chapter 1 Prerequisites | 1 |
| General | 1 |
| Windows | 1 |
| Unix | 2 |
| | |
| Chapter 2 Upgrading | 3 |
| Windows | 3 |
| Unix | 4 |
| Preparing the Upgrade | 4 |
| Starting the Unix Upgrade | 6 |
| Software Upgrade | 6 |
| Database Dump Upgrade | 7 |
| LogiView Upgrade | 9 |
| | |
| Chapter 3 Additional Upgrade Information | 10 |
| Workflow Upgrade | 11 |
| Favorites Upgrade | 11 |
| | |
| Chapter 4 Appendix | 12 |
| Log Files | 12 |

Chapter 1

Prerequisites

Before upgrading to Agile e6.0.1 check all listed items.

General

- Please make sure that all Agile services are stopped before applying the upgrade from e6.0 to e6.0.1
- Stop all running 'Web Presentation Service' environments (use the admin server)
- Stop running 'Business Service' in all environments (use the admin server)
- Stop other manually started Agile e6.0 services
- Save your existing installation, including the database, after you have stopped all services
 - Copy the whole installation directory
 - Save the database (save a dump, save your configuration)
- Oracle 10.1.0.4 incl. SQL*PLUS must be installed on the machine
- At least 50 MB hard disk space must be available for the EP_ROOT application home directory, and additional 50 MB for the log files
- Minimum 512 MB RAM have to be available to run the database dump upgrade

Note: Each environment takes about 20 – 30 minutes for the upgrade.

Windows

1. Stop all Agile e6.0 windows services and change the startup type to **Manual** (the admin server will not be available after this step)
 - Agile_eAdmin (Admin server)
 - Agile_eDaemon (Dataview daemon)
 - Agile_eFileService (File service)
 - Agile_eJavaDaemon (Java daemon)
 - Agile_ePortmapper (rpc portmapper)
2. Reboot the machine

For more information about windows services, please refer to the Agile e6.0.1 installation manual PLM601_WindowsServer.pdf.

Note: Do not use the Windows Installer Repair function after you upgraded your software from Agile e6.0!

Unix

Stop the running daemons

- dtv_dmn (dataview daemon)
- httpd (http daemon)
- jade (java daemon)

For more information about the Unix daemons, please refer to the Agile document *Installation Manual for Agile e6.0.1 on Unix Server* (PLM601_UnixServer.pdf / p. 9, "Checking for running processes")

Chapter 2

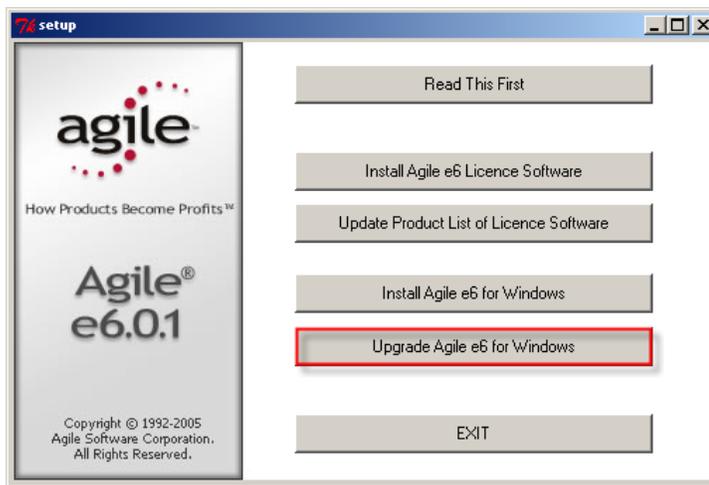
Upgrading

Windows

To upgrade Agile e6 components complete the following steps:

1. Insert the Agile e6.0.1 installation DVD.

If the autostart feature is enabled on the machine, the Agile e6 main setup window opens automatically.



If the CD/DVD autostart feature is not enabled, open the window manually by double-clicking the file `setup.bat` in the root directory of the DVD.

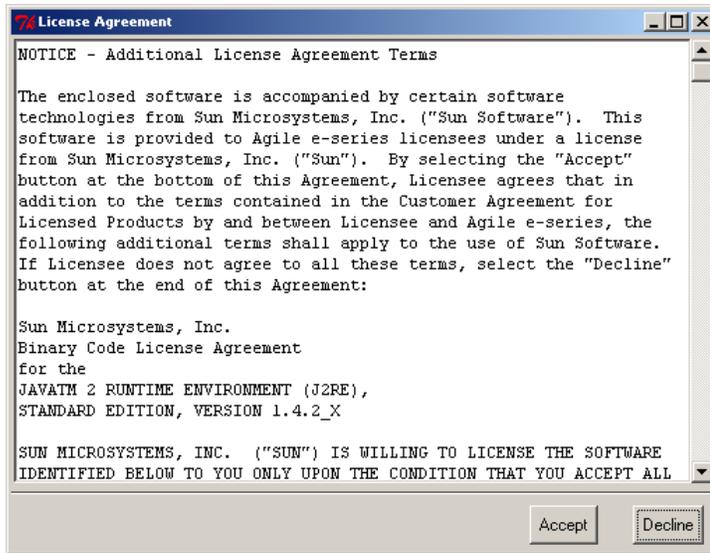
Note: For the latest information on the Agile e6 installation, click Read This First.

2. Click **Upgrade Agile e6 for Windows**.

If the software has not been installed on your system before, the following message will be displayed.



3. Click **OK**.
4. The License Agreement is displayed.



5. Click Accept and continue with the sub-chapter Software Upgrade.

Unix

Preparing the Upgrade

1. Log in as installation user.

This can be any user. The user does **not** need administrative access, but he needs to be the user who installed the existing installation.

2. Point the ORACLE_HOME environment variable to the installed Oracle Database Installation. A client installation is sufficient.

```
echo $ORACLE_HOME
```

If `$ORACLE_HOME` is unknown to your shell environment, set it as follows:

- If it runs in a c shell (csh):
setenv ORACLE_HOME <Path to the Oracle Directory>

Example: setenv ORACLE_HOME /app/oracle/product/10.1

- If it runs in a k shell (ksh):
set ORACLE_HOME=<Path to the Oracle Directory>
export ORACLE_HOME

Note: This environment variable is only needed to upgrade the Agile e6 software.

3. Test the correct setting of `$ORACLE_HOME` with the following command:

```
$ORACLE_HOME/bin/sqlplus -version
```

This should produce an output like the following one:

```
SQL*Plus: Release 10.1.0.4.0 - Production
```

4. Point the JAVA_HOME environment variable to the installed Java Runtime Environment.

Minimum JRE 1.4_08 should be installed on the machine and configured in the environment (JAVA_HOME must be set).

```
echo $JAVA_HOME
```

If `$JAVA_HOME` is unknown to your shell environment, set it as follows:

- If it runs in a c shell (csh):
setenv JAVA_HOME <Path to the JRE Directory>

Example: setenv JAVA_HOME /usr/j2se

- If it runs in a k shell (ksh):
set JAVA_HOME=<Path to the JRE Directory>
export JAVA_HOME

Note: This environment variable is always needed to upgrade and run the Agile e6 software.
It should be set it in the default startup file for the user who runs the Agile e6 software, e.g. in the \$HOME/.login file.

5. Test the correct setting of \$JAVA_HOME with the following command:

```
$JAVA_HOME/bin/java -version
```

This should produce an output like the following one:

```
java version "1.4.2_09"
```

```
Java(TM) 2 Runtime Environment, Standard Edition (build 1.4.2_09-b05)
```

```
Java HotSpot(TM) Client VM (build 1.4.2_09-b05, mixed mode)
```

6. If you are working remote, please set the DISPLAY environment variable.

Check that your environment variable DISPLAY is set to your current working display by calling:

```
echo $DISPLAY
```

If `$DISPLAY` is unknown to your shell environment, set it as follows:

```
csh-Shell  
setenv DISPLAY <YourCurrentDisplay>:0.0
```

Example: setenv DISPLAY 192.168.0.2:0.0

```
ksh-Shell  
set DISPLAY=<YourCurrentDisplay>:0.0  
export DISPLAY
```

Starting the Unix Upgrade

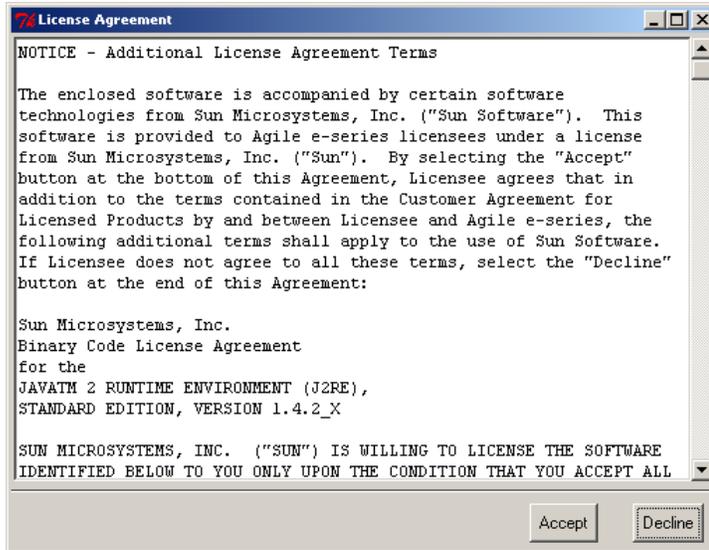
1. Start the upgrade by changing to the setup directory:

```
cd <dvd-path>/unix/setup
```

2. Enter the following command:

```
./setup
```

The license agreement is displayed.



3. Click Accept.

In the next window select the installation type Upgrade.



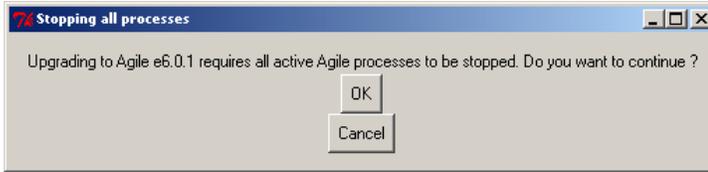
4. The setup dialog is opened. Please confirm with OK and continue with the sub-chapter Software Upgrade.

Software Upgrade

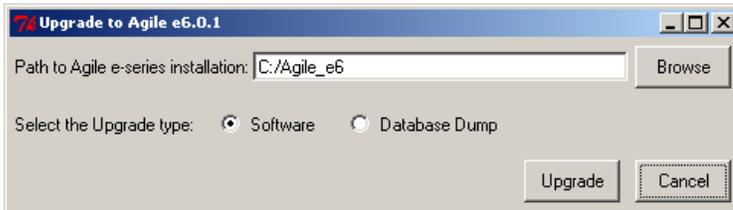
This section is applicable for Windows and Unix.

Note: The software needs to be upgraded before you can upgrade the database dump.

The following window is displayed after completing one of the previous sections.



1. Stop all active processes before you click OK.



2. Select the location of the installed Agile Software and click **Upgrade**.

The following dialog displays if the main configuration file `init\ep.edb` was not found in the selected installation directory.



3. Click **Retry** to go back to the last dialog if this happens or **Cancel** to exit the upgrade process.

The following dialog is displayed if the software upgrade is finished.



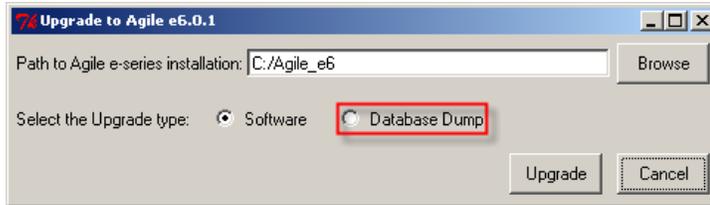
4. Click **No** if you do not want to upgrade the database dump.
Or click **Yes** if you want to upgrade the database dump and continue with the next section.

Note: In Windows do not use the Windows Installer Repair function after you upgraded your software from Agile e6.0!

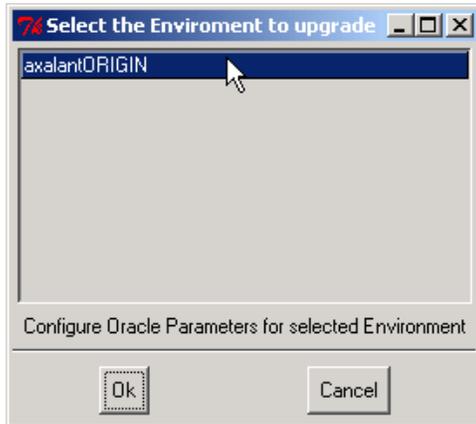
Database Dump Upgrade

Note: The software needs to be upgraded before you can upgrade the database dump.

The following window is displayed again after you successfully upgraded the software.



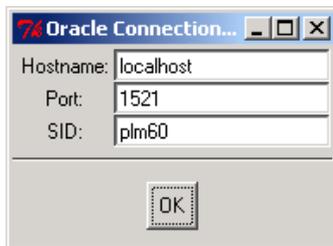
1. Select **Database Dump**. This will open a new dialog window to select the environment that should be updated.



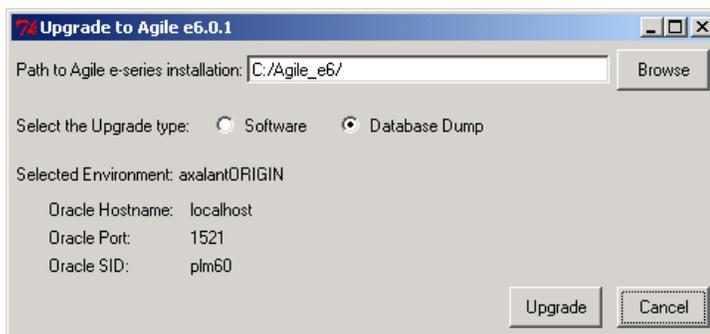
2. In the Select the Environment to upgrade window select e.g. axalantORIGIN and click **OK**.

Note: The upgrade tool tries to read the following from your existing environment, but it is not guaranteed that all entries will be correct.

3. Confirm that the entries in the next window are correct and click **OK**.



The main window will be updated with the chosen values.



4. Click Upgrade.

- Note:** The upgrade can take 20 – 30 minutes for each environment. You will see no update of the current window and the window can appear blank! You can check the created log files (see Appendix) for errors created during the upgrade. The log files are updated when each section of the upgrade is finished.

The following dialog is displayed if the database dump upgrade is finished.



- Note:** Please check the database dump upgrade log files!
- Note:** After the software upgrade is completed, for each environment where the Workflow Service is used, the Admin UIC has to be set with the admin tool. Please refer to *Administration Manual for Agile e6.0.1* (PLM601_admin.pdf).

5. Click OK. The Upgrade to Agile e6.0.1 window is displayed again.

- Note:** To select another environment go back to step 1.

6. Click Cancel to finish the upgrade.

LogiView Upgrade

Some standard LogiView procedures were changed in Agile e6.0.1. The following list shows the involved logic models:

EDB_PAC_OBJ, EDB_RMT_REL, EP, EP_APP, EP_CPY, EP_DFM, EP_GRP, EP_GRP_INHERIT, EP_WFL, EP_WFL_EWO, GdmAttribute, GdmDocument, GdmError, GdmExecute, GdmFile, GdmFncOle, GdmInit, GdmInstall, GdmLink, GdmMenu, GdmProperty, GdmSystem, GdmToolBar, GdmWorklist, PrpExplorer, PrpFavorite, PrpMask, PrpMenu, GdmPrs, GdmTools, GdmMask, GdmZip, GdmMail, GdmGuard, GdmCompound, GdmBatch, PrpStructure

All existing LogiView logic models in the current database dump that contain the above-mentioned procedures will be deleted if they are identical. Otherwise, they will be renamed automatically when they were changed before.

Next, all new logical models will be re-inserted. After the patch upgrade the renamed LogiView procedures have to be compared with the new inserted procedures. If the previous changes are still required, they have to be added manually.

Chapter 3

Additional Upgrade Information

The following information describes the process of the database dump upgrade in the background.

- ❑ The database upgrade is based on a standard Agile upgrade tool and has the following directories:
 - JAR archive
 - SQL scripts
 - Pre-configured XML control files
- Note:** All changes will be saved directly in the dump.
- Note:** For the patch upgrade, no reference dumps are needed. Therefore, pre-configured XML control files for delete / insert / update actions are delivered with the upgrade package. During execution of these files a conflict recognition help to locate possible weak points.
- ❑ Since the patch upgrade is running in silent mode, the whole procedure is combined in a single shell script. After calling this script, SQL files are executed on the specified dump and data modifications will be made through a JDBC driver.

These are the steps that are executed during the database dump patch upgrade:

1. Parameters are passed to the application: ep_root path, environment name, host name, port number and SID of the oracle database.
2. SQL Script dtv407-430.sql is executed to adapt internal DataView tables to the new structure, so that a repository update is possible.
3. Repository update with previously generated (delivered with the package) XML control is executed. During this update conflicts will be logged in an errors.log file.
4. The step “Synchronize repository“ is executed to ensure customer database dump has the new table and index structure.
5. Some Agile e6.01 special upgrade steps will be executed – like workflow project references update and take over of PLM5.x favorites into the Agile e6.0x browser.
6. SQL Script del_and_save_lvmodel_60_601.sql will be executed, which delete/save logical models, which have to be re-inserted since these were modified in Agile e6.01
7. Next, the rest of Agile’s configuration tables will be updated – similar to step 4
8. Views, triggers, stored procedures, etc. must be recreated. This is possible with a cre_rep_edb_60_601_diff.sql script, which should be created for the 6.01 dump. However, this script contains only objects that were changed since Agile e6.0. Additionally, a script where all database objects are contained has also DDL statements available (cre_rep_edb.sql).
9. Finally, all object are recompiled, and a list of all objects still invalid in the schema is stored in an invlaid_objects.log file.

Workflow Upgrade

There is a known problem within the projects workflow with the creation of a relation between process and project that has several versions. Several entries will be shown in the list, because the PROJ_ID is not unique for the stored versions. For this reason a new database field was added (T_PRC_DAT.EDB_PRO_REF). This field will be filled with values during the Agile e6.0.1 upgrade.

Favorites Upgrade

The upgrade tool for Agile e6 does not contain the functionality to convert PLM5.x browser favorites to Agile e6. The upgrade for Agile e.6.0.1 inserts several data into the browser table to make favorites and stored queries visible in the client browser window.

Chapter 4

Appendix

Log Files

Log files are created and stored in a separate environment subdirectory. After the database dump upgrade is finished, these files have to be reviewed. Especially the errors.log file, to make sure that no conflicts occurred. If conflicts have occurred, manual dump adaptations have to be made.

- ❑ Errors.log
Contains all errors that occurred during the dump upgrade.

The errors.log file points to the following log files:

- ❑ Errordetail.log
Contains technical information.
- ❑ Testconnection_customer.log
Check this log file for successful connection via SQL*Plus.
- ❑ Dtv407-430.log
Check this file for errors (“already exists” errors can be ignored).
- ❑ Cre_rep_edb_60_601_diffx.log
Check that this script was executed successfully (all errors can be ignored).
- ❑ Del_and_save_lvmodel.log
Check which logic models were dropped / saved. Changes that were made during the save procedure must be re-implemented after the dump upgrade
- ❑ Invalid_objects.log
Check this file for invalid objects within the database dump.