Agile e6.0.2

Upgrade Guide from Agile e6.0.1 to Agile e6.0.2

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REVISIONS

Revision	Date	Pages Effected	Description
A	30/03/2006	All	Initial document

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Chapter 1
Prerequisites

Before upgrading to Agile e6.0.2 check all listed items.

General

- ❑ Please make sure that all Agile services are stopped before upgrading from Agile e6.0.1 to Agile e6.0.2
- ❑ 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 e 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 or 10.2.0.2 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
- ❑ The Felics Agent/Server has to be upgraded to version 3.01
- ❑ Running the database upgrade requires a minimum 512 MB RAM.

  Note: The upgrade takes about 20 – 30 minutes for each environment.

Windows

Except the 'Web Presentation' and Business Services which need to be stopped manually, all other services are automatically stopped. For more information about windows services, please refer to the Agile document *Installation Manual for Agile e6.0.2 on Windows Server* (PLM602_WindowsServer.pdf.)

  Note: Do not use the Windows Installer Repair function after you have upgraded your server software from Agile e6.0.1!

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 e6.0.2 on Unix Server* (PLM602_UnixServer.pdf) chapter "Checking for running processes".

Chapter 2

Upgrade on Windows

With Agile e6.0.2, the combined Server and Client installation has been split into an Agile e6 Client and Agile e6 Server installation. This means that the two installations cannot share the same installation directory. Due to this, the upgrade must be executed in the following way:

❑ Windows Server Upgrade

❑ Windows Client Upgrade

❑ Dump Upgrade

The new "configuration" restricts the upgrade if the e6.0.1 server was installed with the client component:

❑ A server upgrade will remove the client part. A new client has to be installed in a new directory after the server was upgraded.

❑ A client upgrade is not allowed for a server installation. Doing so would destroy the existing environment(s). Therefore the following window will be displayed if the client upgrade was selected:

Windows Server Upgrade

To upgrade the Agile e6 server complete the following steps:

1. Insert the Agile e6.0.2 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.
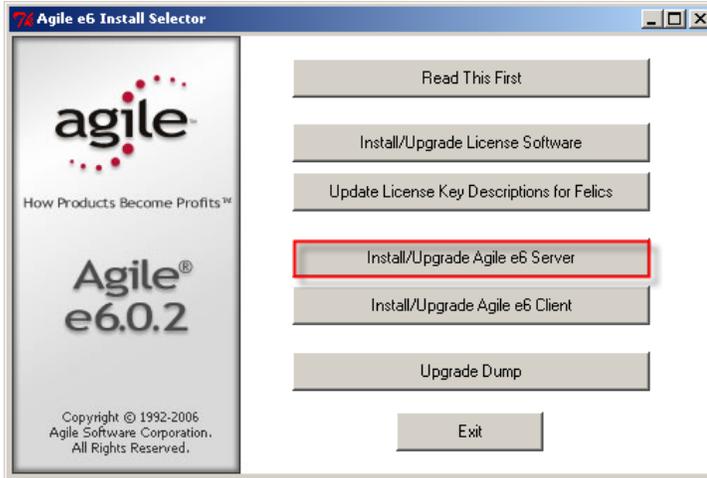
2. Click **Install/Upgrade Agile e6 Server**.

> **Note:**   A new server installation will be started if the software has not been installed on your system before.

Depending on your previous installation, one of the following two windows will open.

With Client Component installed   Without Client Component installed

3. Click **OK**.

   The Agile e6 server will be upgraded and the progress is displayed. After the upgrade is finished, the following window is displayed:

4. Click **OK** to finish the server upgrade.

Windows Client Upgrade

To upgrade the Agile e6 client, open the Agile e6 main setup window.
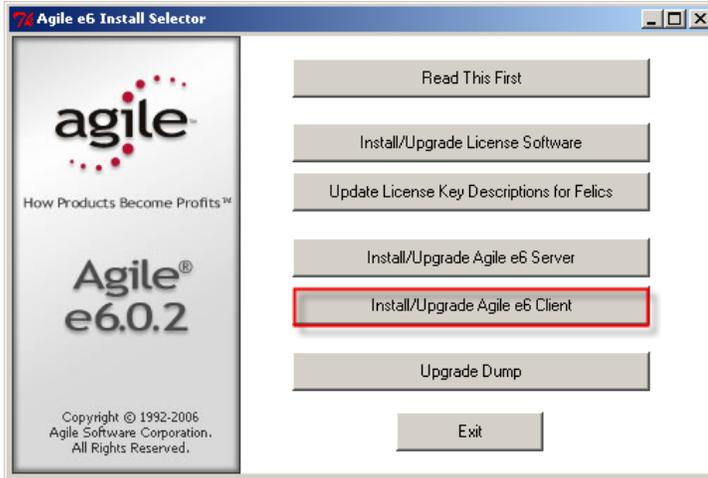
1. Click Install/Upgrade Agile e6 Client.

   Note: A new client installation will be started if the software has not been installed on your system before.
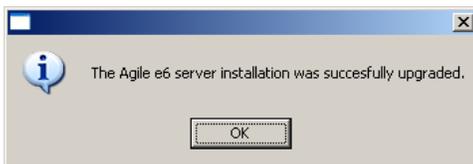
   The following window will open.
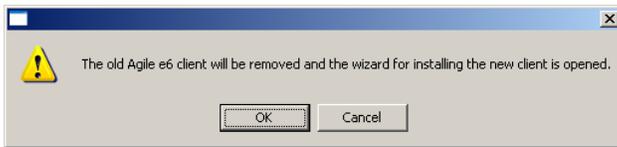
2. Click **OK**.

   The old Agile e6 client will be removed and a new client installation will be started displaying the Language selection window.

3. To install the new client, refer to Chapter 3 of the *Installing Manual for Agile e6.0.2 Windows Client* (PLM602_WindowsClient.pdf).

   Note: Existing global DataView Profiles will be merged after the Agile e6 client was successful installed. Additional information about changes can be found in Appendix Chapter Client Profile Changes.

Database Dump Upgrade

   Note: Before upgrading the dump, make sure to have upgrade the software as described in the chapters above.

1. Open the Agile e6 main setup window.
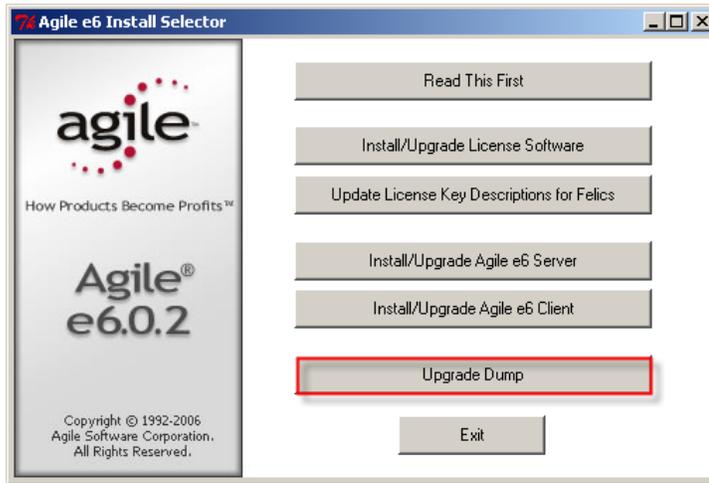
2. Click **Upgrade Dump**.

If the software has not been installed on your system before, the following message will be displayed.
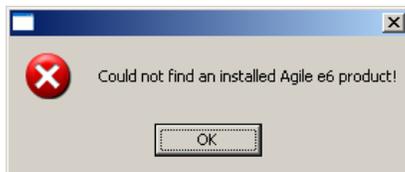
3. Click OK and continue to continue with the dump upgrade.

The following window is displayed.
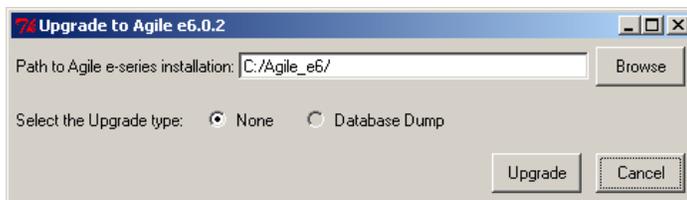
4. Select Database Dump.

This will open a new dialog window to select the environment that should be updated.
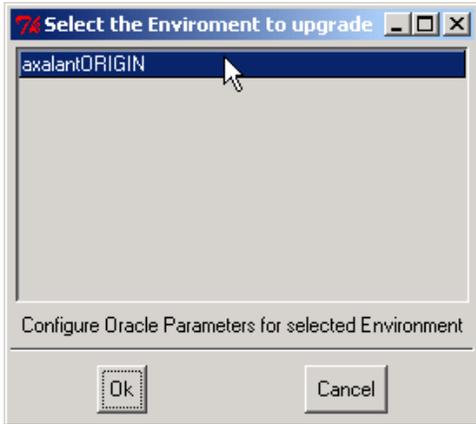
5. Select the environment e.g. axalantORIGIN and click **OK**.

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

> **Note:** The upgrade tool tries to read the following from your existing environment, but it cannot be guaranteed that all entries are correct.
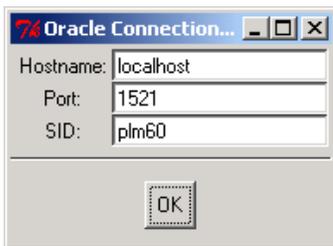
The main window will be updated with the chosen values.
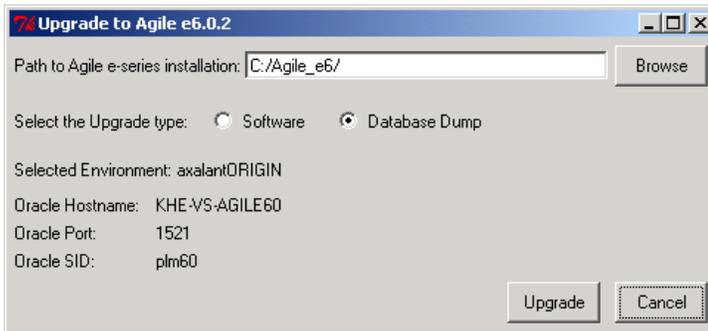
7. Click **Upgrade**.

> **Note:** The upgrade can take 20 – 30 minutes for each environment. The current window is not updated during upgrade thus it might appear blank or inactive.

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

8. Check the database dump upgrade log files! The log files are updated when each section of the upgrade is finished. See the list of log files in the Appendix

> **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 e6.0.2* (PLM602_admin.pdf).

9. Click **OK**.

The Upgrade to Agile e6.0.2 window is displayed again.

10. To select another environment go back to step 1. Otherwise click **Cancel** to finish the upgrade.

Chapter 3

Upgrade on Unix

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

Preparing the Upgrade

1. Log in as installation user.

   The user must be the same one as the one who installed the existing software. Administrative access is not required.

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:

   In a c shell (csh):

   setenv ORACLE_HOME <Path to the Oracle Directory>
   (e.g. setenv ORACLE_HOME /app/oracle/product/10.1)

   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_09 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:

   In a c shell (csh):

   setenv JAVA_HOME <Path to the JRE Directory> (e.g. setenv JAVA_HOME /usr/j2se)

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_11"

Java(TM) 2 Runtime Environment, Standard Edition (build 1.4.2_11-b06)

Java HotSpot(TM) Client VM (build 1.4.2_11-b06, 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:

In a c shell (csh):

csh-Shell
setenv DISPLAY <YourCurrentDisplay>:0.0 (e.g. setenv DISPLAY 192.168.0.2:0.0)

In a k shell (ksh):

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

Starting the Unix Software 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.
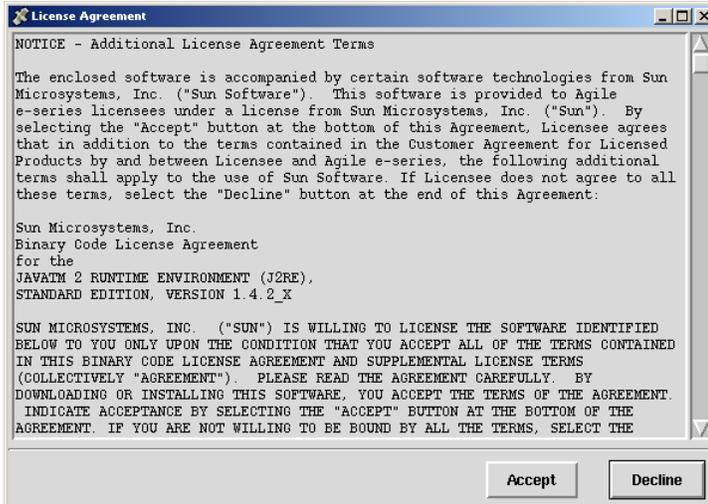
3. Click **Accept.**

4. In the next window select the installation type **Upgrade.**

5. Stop all active processes and click OK.

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

> **Note:** If the main configuration file init/ep.edb was not found in the selected installation directory; the following error message is displayed.

7. 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.

8. Click **No** if you do not want to upgrade the database dump.
Click Yes to continue with the database dump upgrade. .

Database Dump Upgrade

> **Note:** Before upgrading the dump, make sure to have upgrade the software as described in the chapters above.

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.
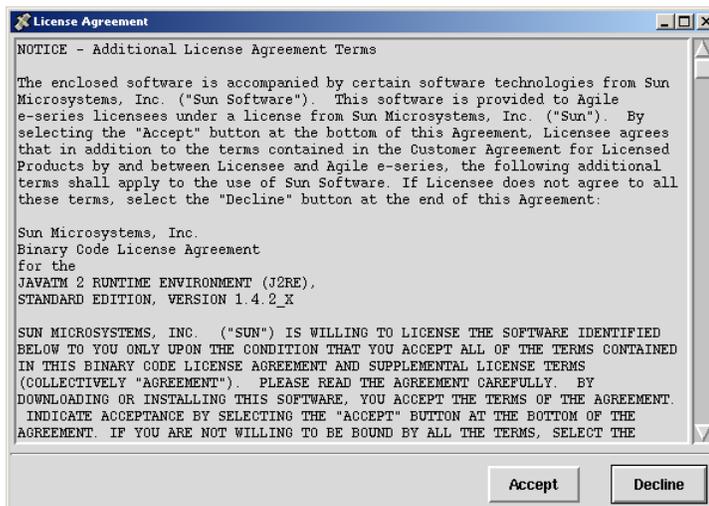
3. Click **Accept**.
4. Select the installation type **Upgrade**.

The setup dialog is opened.
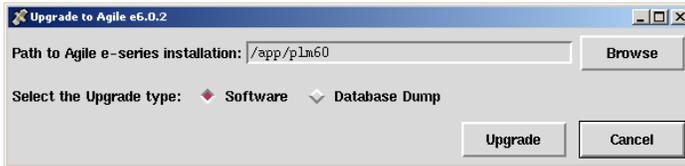
5. Select Database Dump.

This will open a new dialog window to select the environment that should be updated.

6. Select the environment e.g. axalantORIGIN and click **OK**.
7. Confirm that the entries in the next window are correct and click **OK**.

> **Note:** The upgrade tool tries to read the following from your existing environment, but it cannot be guaranteed that all entries are correct.
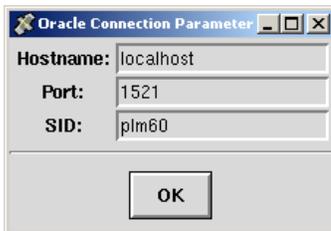
The main window will be updated with the chosen values.
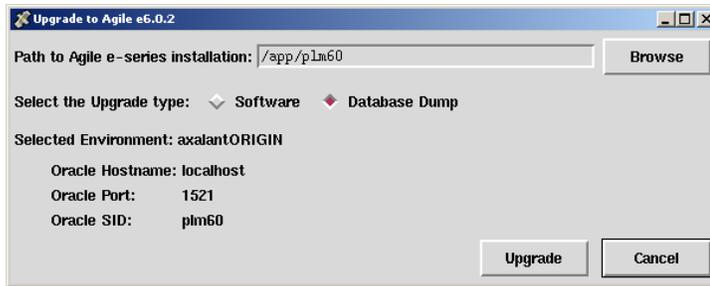
8. Click **Upgrade**.

> **Note:** The upgrade can take 20 – 30 minutes for each environment. The current
> window is not updated during upgrade thus it might appear blank or inactive.

The following dialog is displayed if the database dump upgrade is finished.
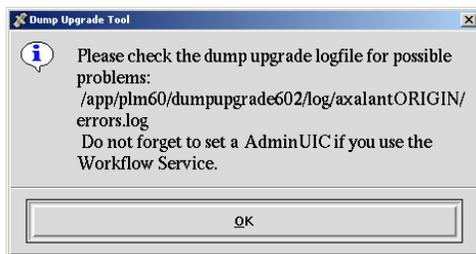
9. Check the database dump upgrade log files! The log files are updated when each section of the
    upgrade is finished. See the list of log files in the Appendix

> **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 e6.0.2* (PLM602_admin.pdf).

10. Click **OK**.
11. The Upgrade to Agile e6.0.2 window is displayed again. Select another environment go back
    to step 1. Otherwise click **Cancel** to finish the upgrade.

Chapter 4

LogiView Upgrade

Some standard LogiView procedures were changed in Agile e6.0.2. The following list shows the effected logic models:

- ❑ 'EDB_CPS_PRL'
- ❑ 'EDB_RMT_HYPLINK'
- ❑ 'EDB_RMT_MEN'
- ❑ 'EDB_RMT_PAR'
- ❑ 'EDB_RMT_REL'
- ❑ 'EP'
- ❑ 'EP_APP'
- ❑ 'EP_CNF'
- ❑ 'EP_CPY'
- ❑ 'EP_GRP'
- ❑ 'EP_WFL'
- ❑ 'EP_WFL_EWO'
- ❑ 'GdmButton'
- ❑ 'GdmCompound'
- ❑ 'GdmDocument'
- ❑ 'GdmError"
- ❑ 'GdmExecute'
- ❑ 'GdmFile'
- ❑ 'GdmFncOle'
- ❑ 'GdmInit'
- ❑ 'GdmMail'
- ❑ 'GdmMask'
- ❑ 'GdmMenu'
- ❑ 'GdmOffice'
- ❑ 'GdmProperty'
- ❑ 'GdmRelation'
- ❑ 'GdmThumbnail'
- ❑ 'GdmToolBar'
- ❑ 'GdmTools'
- ❑ 'GdmWorklist'

- ❑ 'PDW_RULE'
- ❑ 'PrpMask'
- ❑ 'PrpMenu'

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.

The new logic 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 5

Additional Upgrade Information

The following information describes the background process running during the database dump upgrade.

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 conflict recognition helps 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 drive.

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 dtv430-431.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 special Agile e6.0.2 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_601_602.sql will be executed, which deletes/saves logical models, which have to be re-inserted since these were modified in Agile e6.0.2.
7. All remaining 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 _601_602_diff.sql script, which should be created for the Agile e6.0.2 dump. However, this script contains only objects that were changed since Agile e6.0.1. Additionally, a script where all database objects are included has also DDL statements available (cre_rep_edb.sql).
9. Finally, all objects are recompiled, and a list of all objects, still invalid in the schema, is stored in an invalid_objects.log file.

Chapter 6
Appendix

Dump Upgrade 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.los
Contains technical information.

❑ Testconnection_customer.log
Check this log file for successful connection via SQL*Plus.

❑ Dtv430-431.log
Check this file for errors ("already exists" errors can be ignored).

❑ Cre_rep_edb_601_602_diffx.log
Check that this script was executed successfully (all errors can be ignored).

❑ del_and_save_lvmodel_601_602.log
Check which logic models were dropped / saved. Changes that were made during the save procedure must be re-implemented after the dump upgrade

❑ db_defaults.log
Check this log file for errors

❑ Invalid_objects.log
Check this file for invalid objects within the database dump.

Client Profiles Changes

There are two profile locations for the DataView client in the Windows registry:

❑ HKEY_LOCAL_MACHINE\Software\PiSA\Profiles

❑ HKEY_CURRENT_USER\Software\PiSA\Profiles

Note: With this upgrade HKEY_LOCAL_MACHINE profile is updated, while HKEY_CURRENT_USER needs to be updated by the user manually.

All HKEY_LOCAL_MACHINE profiles will be merged from the Agile e6.0.1 installation if both the old and the new installation are installed for "All User" and the DATAVIEW_CIPC entry will be modified.

The DATAVIEW_CIPC environment entry changed from

1:epclt_winsock 57:psc_dde

to

1:epclt_winsock**vc6** 57:psc_dde

e.g. in:
HKEY_LOCAL_MACHINE\Software\PiSA\Profiles_Default\Environment\DATAVIEW_CIPC