ORACLE

Agile Advantage™ Upgrade Guide

v2006 SP4

Part No. E12863-01
August 2008

CONTENTS

Appendix B   Changing Passwords

Index

PREFACE

Before You Begin

This guide includes instructions for upgrading to Agile Advantage 2006 with Oracle 10g Release 2. This guide references many sections in the *Agile Advantage 2006 Installation and Maintenance Guide* so it will be referenced frequently as the upgrade is performed.

For a first-time setup of Agile, see the *Agile Advantage 2006 Installation and Maintenance Guide.*

Agile Advantage Documentation

The Agile Advantage documentation includes Adobe® Acrobat® PDF files available online. Also, ask your Agile administrator if there is a Documentation folder available on your network, from which you can access the Agile documentation (PDF) files.

> **Note** To read the PDF files, use the free Adobe® Acrobat® Reader™. For more information about Adobe Acrobat Reader, visit www.adobe.com.

Before you install, you should check for possible updates to the documentation files by visiting the Documentation section of the Support area of the Agile web site at `http://sme.agile.com/Support/Login.asp`. If you do not have access, please contact advantagesupport@agile.com for assistance.

Documentation Roadmap

You can find a complete list of all Agile documentation from the **Help** menu, or by visiting the Documentation section of the Support area of the Agile web site at `http://sme.agile.com/Support/Login.asp`.

Readme File

The Agile Advantage readme file contains up-to-date information that may be useful to you in configuring Agile Advantage. You can view the readme file from the main Agile Installation folder.

Other Information Sources

You can get additional help in a number of ways.

Agile Online Support

For product support or information about Agile products and services, visit the Agile web site at:

`http://sme.agile.com/Support/Login.asp`

Customers with a current Agile Advantage Support agreement (existing account required or request an account by e-mail to advantagesupport@agile.com) can log in to this site to access the following online services for Agile Software® products:

❑ Problem status and reporting

❑ Alerts

❑ Frequently asked questions (FAQs)

❑ Documentation

Agile Advantage Training

Agile and our certified solution providers offer a variety of training programs for Agile Advantage. These programs include onsite training, classroom training, and web-based training.

Agile Administrators are recommended to attend either onsite or classroom training for both the User and Administrator course work.

Agile users are recommended to use the web-based training or attend classroom or onsite training for the User course work.

To schedule Agile training, contact your account executive.

Manual Conventions

The following table lists conventions used in the Agile Advantage documentation, and gives an example of how each convention is applied.

Table 1: Conventions Used in This Manual

Convention	Example
Text from the user interface (for example, field names, nodes, and menus and commands) are shown in a **Sans Serif Bold** font.	Select the **SmartRules** node. Click **OK**.
Text that you type is shown in `Courier`.	Type the user name `Administrator`.
Placeholders for variable text are shown in *Italic*.	Set the directory to *drive*:\Agile\Qadmin\.
A vertical bar is used to separate a menu name from its menu command; to indicate the expansion of nodes and subnodes; and to indicate Software keys.	You can generate Agile Administrator reports from the **Tools | Reports** menu. Expand the **Change Orders | Attributes | Cover Page** node. **HKEY_CURRENT_USER | Software**.
Right-click means to press and release the right mouse button.	Right-click to see the shortcut menu.
A plus sign (**+**) means to hold down one key while pressing another.	To open the **File** menu, press **Alt**+F.
Shift+click means to press and hold the Shift key while clicking the mouse button.	**Shift**+click to select a block of items in the list.
Ctrl+click means to press and hold the **Ctrl** key while clicking the mouse button.	**Ctrl**+click to select non-contiguous items in the list.
The term "computer" generically refers to hardware for a server or workstation.	Import the Agile database file to replicate the database on another computer.

Special Icons

This manual uses special icons to identify actions available to users. The icon appears to the left of the topic, for example,

	Identifies right mouse click actions

Overview

Welcome to the Agile Advantage 2006 Upgrade Guide. The chapter contains these topics:

- ❑ *Overview of the Upgrade Process*
- ❑ *What's New Since Agile Advantage 2005*

Before You Begin

This guide includes instructions for upgrading to Agile Advantage 2006 with Oracle 10g Release 2. This guide references many sections in the *Agile Advantage 2006 Installation and Maintenance Guide* so it will be referenced frequently as the upgrade is performed.

For a first-time setup of Agile, see the *Agile Advantage 2006 Installation and Maintenance Guide.*

Overview of the Upgrade Process

This *Agile Advantage 2006 Upgrade Guide* contains instructions for upgrading Agile Product Collaboration versions 8.0 SP5 (85085), 8.0 SP6 (85086), 8.5 SP2 (85085), and 8.5 SP3 (85086), as well as, Agile Advantage 2005 (including SP1 and SP2) and Agile Advantage 2006, Agile Advantage 2006 SP1 to Agile Advantage 2006 SP2.

If you are on an Agile release prior to Agile 8.0 SP5, you will need to upgrade first to at least Agile 8.0 SP5. Upgrades prior to Agile 8.0 SP5 are supported, but are not part of this scope of this upgrade guide. For further information, contact your Agile Account Executive or Agile Advantage Support.

While this guide attempts to be as comprehensive as possible, you will most probably have additional questions. Agile strongly recommends that you contact your Account Executive to discuss the use of Agile Certified Engineer, to assist in the planning and performance of any upgrade.

Agile strongly recommends that all customers follow a two-pass upgrade process. Using a two-pass upgrade process allows for complete end-to-end validation testing.

Agile recommends that you read this guide completely, along with both the *Agile Administrator 2006 for Agile Advantage User Guide*, the *Agile Advantage 2006 Installation and Maintenance Guide* and the Agile Advantage Readme document before initiating any upgrade process.

For upgrading to Agile Advantage 2006, start with Chapter 2, "Verifying and Backing Up the Database and iFS vault". Then continue on with Chapter 3, "Upgrading to Agile Advantage 2006".

For customers who have a medium hardware sizing configuration (customers with separate database and Agile application servers), you will need to install an Oracle client. Follow the instructions in Chapter 3, "Installing and Configuring an Oracle Client" in the *Agile Advantage 2006 Installation and Maintenance Guide*.

For customers who have licensed and use Agile ChangeCAST, see Chapter 4, "Migrating to Agile ChangeCAST 2006".

Important Agile Advantage 2006 is certified with Oracle 10g Release 2 on Windows Server 2003 Standard Edition.

Note You must contact your Account Executive if you are upgrading from Agile Product Collaboration 8.5 (Service Pack 4 or Service Pack 5).

Upgrading Servers and Clients

Whenever an Agile Advantage component is upgraded on a server or client computer, the computer must be immediately restarted (either when you are prompted or manually) to ensure that the upgrade is properly applied. If the computer is not immediately restarted, the user may experience difficulties using Agile Advantage 2006 components.

Note   The upgrade process requires knowledge of system, network, and database administration. Make sure all necessary resources and experienced personnel are available before upgrading the software.

Note   Spyware and virus software packages can inhibit the ability to automatically configure Agile Advantage 2006. Make sure you disable these tools before upgrading Agile Advantage 2006.

You should also close any other open applications, including Microsoft Outlook.

Agile Registry Changes

During the Agile installation, changes are made to the registry to include information about Agile components. The installation program attempts to place information into the HKEY_LOCAL_MACHINE section of the registry. The user logged in to the computer during the Agile upgrade must have local Administrator permissions on that computer. If the installation program is unable to write to the HKEY_LOCAL_MACHINE section, the upgrade will stop with a warning message.

Oracle Database Requirements

Agile Advantage 2006 is certified with Oracle 10g Release 2 on Windows Server 2003 Standard Edition.

Note   Agile Advantage is not certified or tested on Microsoft Windows Server 2003 x64 Editions.

What's New Since Agile Advantage 2005

For an overview of the new features in the Agile Advantage 2006 Administrator module, see Chapter 1 entitled "What's New in Agile Advantage 2006" in the *Agile Administrator 2006 for Agile Advantage User Guide*.

Verifying and Backing Up the Database and iFS vault

This chapter explains how to verify the Agile Advantage data in your Oracle database. It includes these topics:

- ❑ *Overview*
- ❑ *Verifying the Integrity of the Database*
- ❑ *Backing Up the iFS File Vault*
- ❑ *Backing Up the Windows Client BMP Files*
- ❑ *Backing Up ChangeCAST Out and Profiles Files*

Overview

This chapter describes how to verify the content of your current Oracle database in preparation for upgrading to Agile Advantage 2006.

Before you upgrade to Agile Advantage 2006, make sure your Agile system meets all hardware requirements. Refer to the *Agile Advantage 2006 Installation and Maintenance Guide* for hardware requirements.

Important   If you are upgrading from a version prior to Agile 8.0 SP5 (85085), 8.0 SP6 (85086), 8.5 SP2 (85085), 8.5 SP3 (85086), or Agile Advantage 2005, you must first upgrade to one of these versions before you proceed. If you are on an earlier version than the ones listed above, contact your Agile Account Executive.

Important If you are upgrading from a version supported by this upgrade process, you must first install Oracle 10g Release 2. Refer to following sections in the specified order:

1 "Backing Up Previous Versions of Oracle" on page A-3

2 "Removing Previous Versions of Oracle" on page A-3

3 "Installing Oracle 10g Release 2 and Migrating the Database Instance" on page A-5

Note Oracle 10g supports importing schema whose name starts with non-alphanumerical characters, but the name must be quoted and upper-cased (e.g., `"1AGILE"` is valid, but `1agile` is not).

Note The database examples in this guide assume that you are using the standard Agile and system Oracle accounts and passwords. If you have changed these values, please substitute the correct values in place of the standards.

The upgrade scripts are installed by launching `DB.exe` and selecting the **Install Agile Tools Folder** option from the **Database Setup** window. By default, the scripts are installed in the `<drive:>\Program Files\Agile Advantage 2006\Tools` folder. Please check with Agile Advantage Support web site at `http://sme.agile.com/support/login.asp` for any updates to these scripts, prior to starting your upgrade process. You should also check Agile's Support web site for additional utilities that can be helpful during the upgrade process.

Note It is recommended to download the latest `DB.exe` from the Agile Advantage Support web site.

Note In the upcoming sections, you will have to use Oracle SQL*Plus utility. If you encounter any issues while running SQL*Plus directly from Windows, run SQL*Plus from the Command Prompt.

Gathering Documentation and Applications

Besides this user guide, you need the following:

❑ The *Agile Advantage 2006 Installation and Maintenance Guide*

❑ The Agile Advantage 2006 Installation folder

❑ All versions of the "Averify" verification scripts that you will need to successfully perform your upgrade process (available from the Agile Advantage Customer Support web site). See "Verifying the Integrity of the Database" below for more details.

> **Note**   After you have upgraded your system, see Appendix A entitled "Agile System Maintenance" in the *Agile Advantage 2006 Installation and Maintenance Guide* for information about maintaining and fine-tuning your Agile system.

Verifying the Integrity of the Database

The "Averify" tool performs an integrity check against the Agile Advantage database and reports on specific errors. "Averify" includes a check for missing indexes and inconsistent data stored in the various database tables, such as the Rev table, the Change table, and the BOM table.

The purpose of the "Averify" tool is to report errors. "Averify" does not attempt to fix errors and does not modify your database in any way. Even if the results of an" Averify" check indicate that there are no errors, this is not an indication of an error-free database.

"Averify" is recommended as a troubleshooting tool to check for database integrity problems that can directly effect Agile. It can also be used routinely as a maintenance tool to check for and identify potential problems with the Agile database.

> **Note**   Running "Averify" and repairing all resulting errors is required when you upgrade.
>
> You will be running "Averify" several times during the upgrade process to confirm the integrity of your data.

The "Averify" script is continually being updated, and the latest version is made available to customers through a web posting on the Agile Advantage Support Downloads page.

"Averify" is version specific, i.e. you must run the version of "Averify" that applies to the database you are verifying. At each step in the upgrade process, it is recommended to run"Averify" both before and after the upgrade to ensure data consistency.

To check the version of your database, login to SQL*Plus (using `agile/tartan@agil`, or any relevant account) and type the following:

```
select value from propertytable where id=33086;
```

Supported Database versions: 8.0 SP5 (85085), 8.0 SP6 (85086)

❑ Oracle_averify85.sql

❑ Oracle_averify2005.sql

❑ Oracle_averify2006.sql

Supported Database versions: 8.5 SP2 (85085), 8.5 SP3 (85086)

❑ Oracle_averify85.sql

❑ Oracle_averify2005.sql

❑ Oracle_averify2006.sql

All Advantage Database versions supported

❑ Oracle_averify2005.sql

❑ Oracle_averify2006.sql

To verify the integrity of your Agile database before upgrading to Agile Advantage 2006:

1 Ensure that all Agile services are stopped:

   a Choose **Start** | **Settings** | **Control Panel**.

   b Double-click the **Administrative Tools** icon and then double-click the **Services** icon.

   c For each Agile service in the **Services** dialog box, select and stop the service.

   d You must also stop the IIS Admin service if it is running.

   e You must also stop the Apache Tomcat service if it is running.

   f Close the **Services** dialog box.

2   For your convenience while running through the "Averify" process you should create a temporary folder (e.g. `D:\agilebackup`), so you can easily keep track of your "Averify" logs. Copy the relevant oracle_averify scripts from your tools folder or Agile Advantage Support download site at `http://sme.agile.com/support/login.asp` into this folder.

> **Note**   In the following examples, `XXXX` in `oracle_averifyXXXX_all.sql` or `oracle_averifyXXXX.sql` represents the Agile version number (i.e., 8.0, 8.5, 2005 or 2006) from which you are upgrading.

3   Login to SQL*Plus on the Oracle server (using `agile/tartan@agil`, `agile/tartan@<servername>`, or any relevant account) by choosing **Start | Programs | Oracle - OraDb10g_home1 | Application Development | SQL Plus**.
An **SQL** window opens.

4   Before running the script, create a spool file to record and contain the results from issuing the SQL script. At the SQL prompt type the following:

```
spool D:\agilebackup\oracle_averifyXXXX.lst
```

> **Note**   The file with the LST extension is any filename that you want to use to identify the file that will contain these results. It is best and easiest to give the LST file the same name as the filename that is attached to the SQL file.
>
> You can also specify a drive or location other than what is shown in the previous example. The location specified is where the spool file will be saved.

5   Run the verification script with the following command:

```
@D:\agilebackup\oracle_averifyxxxx.sql
```

You should see some results from executing this script. Once the script is complete, you should see another SQL prompt.

6   Type `spool off` to turn off spooling, and then open the spool file in a text editor and check for errors. If errors are detected, contact Agile Customer Support for assistance.

7   Type `exit` to close the **SQL Plus** window.

> **Note**   If you are following a two-pass upgrade process, Agile strongly recommends that you work with Agile Advantage Support to address, and reduce, any "Averify" issue that might arise, not only in the test system, but also in the production system.

Backing Up the iFS File Vault

Even though you only need to backup your iFS file vault if it is located under Agile's home directory, it is good practice to backup the iFS file vault before upgrading, as structure changes will be made to the vault. See step 2 below, to determine the location of your iFS file vault.

To back up your iFS File Vault:

1 Choose **Start | Run**.

2 In the **Command Prompt** window, type `regedit.exe` *or* `regedt32.exe`.

3 Get the location of your iFS file vault by checking the value of the **StorDirs** registry key, under **HKEY_LOCAL_MACHINE | SOFTWARE | Agile Advantage | AgileiFS**. Backup that folder structure.

4 Get the location of your Preferences directory by checking the value of the **PreferenceDir** registry key under **HKEY_LOCAL_MACHINE | SOFTWARE | Agile Advantage | AgileiFS**. Backup that folder structure as well.

Backing Up the Windows Client BMP Files

To back up your Windows Client BMP files:

1 Go to `<AgileHome>\AgileClient`. Backup all BMP files.

  Note `<AgileHome>` is the directory where the previous version of Agile is installed.

Backing Up ChangeCAST Out and Profiles Files

To back up your ChangeCAST Out and Profiles files:

1 Go to `<AgileHome>\ChangeCAST`. Backup Out and Profiles folders, as well as ChangeCast.agx or ChangeCast.agc files (depending on which Agile version you're upgrading from).

  Note `<AgileHome>` is the directory where the previous version of Agile is installed.

You must now continue to Chapter 3, "Upgrading to Agile Advantage 2006," to upgrade to Agile Advantage 2006 and test the current database configuration.

Upgrading to Agile Advantage 2006

This chapter describes the process for upgrading to Agile Advantage 2006, including:

- ❑ *Overview*
- ❑ *Pre-Requisites*
- ❑ *System Requirements*
- ❑ *Upgrading Agile Server Components*
- ❑ *Upgrading Agile Clients*
- ❑ *Before You Upgrade*
- ❑ *Removing BEA WebLogic Application Server*
- ❑ *Removing Apache Tomcat Web Server and Java Runtime Environment*
- ❑ *Removing Previous Versions of Agile Software*
- ❑ *Upgrading to Agile Advantage 2006*
- ❑ *Registry Changes for Distributed iFS*
- ❑ *Resetting Agile Services*

Note The instructions in this guide refer to chapters and sections in the *Agile Advantage 2006 Installation and Maintenance Guide*.

Important If you are upgrading to Agile Advantage 2006, and migrating to a system configuration that distributes functionality across multiple computers, refer to the *Agile Advantage 2006 Installation and Maintenance Guide*.

If you are upgrading to Agile Advantage 2006, and also migrating to Windows Server 2003 (Agile Advantage is not certified or tested on Microsoft Windows Server 2003 x64 Editions), see the *Agile Advantage 2006 Installation and Maintenance Guide.*

Overview

Agile Advantage 2006 can be distributed over a wide-area network with multiple servers, or it can be limited to a single server with several client computers. For an overview of possible deployment options, see Chapter 1 of the *Agile Advantage 2006 Installation and Maintenance Guide.*

Important Before upgrading to Agile Advantage 2006, read through this entire guide, the Agile Advantage 2006 upgrade checklist, and the Readme file for the latest information. For information about professional upgrade services available from Agile and its certified implementation partners, contact Agile Advantage Customer Support.

Note All folder names and paths show the default settings provided during installation. Your system structure may be different if folder names or paths were changed during the Agile installation.

Note The Agile Advantage 2006 `setup.exe` tool installs and maintains the Agile Advantage product and database. With the release of Agile Advantage 2006 SP2, the database creation, database management and the tools folder have been removed from the `setup.exe` tool and placed in their own installer, the `DB.exe` tool. The `DB.exe` tool performs all of the database installations (i.e., configure database instances, install Agile starter database, import an existing Agile database, setup Oracle Full Text Search and install the Agile Tools folder). The `setup.exe` tool only performs Agile Advantage product installations.

Pre-Requisites

Agile Advantage 2006 requires that certain software be available on the system where its server components are to be installed.

Note For an overview of the required pre-requisites, see the "Overview of Agile Advantage 2006 Installation" section in Chapter 1 of the *Agile Advantage 2006 Installation and Maintenance Guide.*

System Requirements

Agile Advantage 2006 has minimum hardware and software requirements in order for its server components to be installed.

Note   For an overview of the required pre-requisites, see the "Overview of Agile Advantage 2006 Installation" section in Chapter 1 of the *Agile Advantage 2006 Installation and Maintenance Guide.*

Upgrading Agile Server Components

This upgrade guide is intended for Agile systems using:

❑ Agile Product Collaboration 8.0 SP5 (schema version 8.5.085)

❑ Agile Product Collaboration 8.0 SP6 (schema version 8.5.086)

❑ Agile Product Collaboration 8.5 SP2 (schema version 8.5.085)

❑ Agile Product Collaboration 8.5 SP3 (schema version 8.5.086)

❑ Agile Advantage 2005 (All schema versions)

Note   You must contact your Account Executive if you are upgrading from Agile Product Collaboration 8.5 (Service Pack 4 or Service Pack 5); or if you are upgrading from a version of Agile Product Collaboration prior to 8.0 SP5.

Upgrading Agile Clients

After upgrading to the Agile Advantage 2006 server components, you must also upgrade all the Agile client components in order for users to login and use the Agile Advantage system.

Do not perform the server upgrade until you can also upgrade the clients. To upgrade your Agile Client components, you will first need to remove previous Agile Client installations through Microsoft's Add/Remove utility, and then install your Agile Advantage 2006 Client components. Or use the Agile Client Software Upgrade (ACSU) utility to upgrade the clients to Agile Advantage 2006. For further information about installing or upgrading your Agile Client components, see the *Agile Advantage 2006 Installation and Maintenance Guide.*

Note   Make sure you reboot your machine prior to installing your new Agile Client components.

Note All Agile Advantage 2006 Client computers must have the Agile Client Software Update (ACSU) program installed to allow automatic software upgrades. Refer to the *Agile Advantage 2006 Installation and Maintenance Guide* for information about installing the ACSU program for clients.

Uninstalling the Agile OnRamp Server

If you have Agile Product Collaboration 8.x, and before you install Agile Advantage 2006, the Agile OnRamp Server must be uninstalled. It is no longer needed by Agile Advantage 2006.

Uninstalling the Agile View Server

If you have Agile Product Collaboration 8.x, and before you install Agile Advantage 2006, the Agile View Server must be uninstalled. It is no longer needed for Agile Advantage 2006.

Before You Upgrade

Before you upgrade to Agile Advantage 2006, make sure your Agile system meets all hardware requirements. For more information about hardware requirements, refer to the *Agile Advantage 2006 Installation and Maintenance Guide.* If you have questions, contact Agile Advantage Support.

Important Agile Advantage 2006 supports:

- Upgrades from Agile 8.0 SP5 (85085), 8.0 SP6 (85086), 8.5 SP2 (85085), 8.5 SP3 (85086) as well as Agile Advantage releases, including Agile Advantage 2005, Agile Advantage 2005 SP1 and Agile Advantage 2005 SP2, Agile Advantage 2006 and Agile Advantage 2006 SP1.

- APM upgrades from Agile Advantage releases, including Agile Advantage 2005 SP1 and Agile Advantage 2005 SP2.

  If you are on an Agile release prior to Agile 8.0 SP5, you will need to upgrade first to at least Agile 8.0 SP5. For further information, contact your Agile Account Executive or Agile Advantage Support for information.

Note Oracle 10g Release 2 supports importing schema whose name starts with non-alphanumerical characters, but the name must be quoted and upper-cased (e.g., `"1AGILE"` is valid, but `1agile` is not).

Gathering Documentation and Applications

Besides this guide, you need the following:

❑ The *Agile Advantage 2006 Installation and Maintenance Guide*

❑ The Agile Advantage 2006 Installation Tools folder

❑ All versions of the Averify verification scripts that you will need to successfully perform your upgrade process (available from the Agile Advantage Customer Support web site). See "Verifying the Integrity of the Database" in Chapter 2 for more details.

After you have upgraded your system, see Appendix A entitled "Agile System Maintenance" in the *Agile Advantage 2006 Installation and Maintenance Guide* for information about maintaining and fine-tuning your Agile system.

Checking the iFS Server and Registry

During the upgrade, Agile iFS needs to be prepared and the iFS service started as follows:

1 Copy all the required iFS files to a specified folder.

2 Check the following registry entries to make sure they point to the correct iFS:

   HKEY_LOCAL_MACHINE\SOFTWARE\Agile Advantage\AgileiFSHost
   HKEY_LOCAL_MACHINE\SOFTWARE\Agile Advantage\AgileiFS\StorDirs
   HKEY_LOCAL_MACHINE\SOFTWARE\Agile Advantage\AgileiFS\PreferenceDir

3 Restart the iFS service.

Removing BEA WebLogic Application Server

If you are using Agile Product Collaboration 8.x releases, BEA WebLogic should be removed from the Agile server because it will no longer be needed for running the Agile Advantage Web server.

Removing Apache Tomcat Web Server and Java Runtime Environment

Agile Advantage 2006 uses the latest versions of Apache Tomcat Web Server and Java Runtime Environment (JRE). You should remove previous versions installed on your server and install the latest ones.

For more information on the required versions, see the *Agile Advantage 2006 Installation and Maintenance Guide*.

Removing Previous Versions of Agile Software

Before upgrading to Agile Advantage 2006, you must remove all previous versions of Agile components from *all* servers. Users on client computers *must* remove previous versions of Agile components before installing the Agile Advantage 2006 Agile Client Software.

Note   For Windows Client upgrades from Agile Advantage 2005, 2005 SP1, 2005 SP2 to Agile Advantage 2006 (including SP1 and SP2) to Agile Advantage 2006, the Clients are upgraded manually. The Agile Client Software Update (ACSU) program cannot be used for upgrade from Agile Advantage 2005 to Agile Advantage 2006 due to the breadth of changes in this release. ACSU is supported for upgrades from Agile Advantage 2006 and Agile Advantage 2006 SP1 to Agile Advantage 2006 SP2.

Important   Make sure you back up all necessary files before you remove Agile components.

If you are upgrading Agile ChangeCAST, refer to Chapter 4, "Migrating to Agile ChangeCAST 2006," before removing Agile components. You should first create ECO and MCO test files.

To remove Agile components from each server:

Important   You must log in with local Administrator privileges to successfully and completely remove Agile components. For more information, see "Checking the iFS Server and Registry" on page 3-5.

1   Ensure that all Agile services are stopped:

   a   Choose **Start | Settings | Control Panel**.

   b   Double-click the **Administrative Tools** icon and then double-click the **Services** icon.

   c   For *each* Agile service in the **Services** dialog box, select and stop the service.

   d   You must also stop the IIS Admin service if it is running.

   e   You must also stop the Apache Tomcat service if it is running.

   f   Close the **Services** dialog box.

2 Remove all Agile applications from all servers.

   a In the **Control Panel** window, double-click the **Add/Remove Programs** icon.

   b Locate and select **Agile Product Collaboration** or **Agile Anywhere** or **Agile Advantage 2005** and click **Change or Remove Programs**.

   c Choose **Yes** in response to any prompts about removing the applications.

   d If you are using Agile Product Collaboration 8.5 or earlier releases and have other Agile products installed (such as Agile View Server and Agile wCM Server), you must remove those as well.

   e Close the **Add/Remove Programs** dialog box.

   f You are prompt to restart your machine. Click **Yes**.

3 If you are using Agile Product Collaboration 8.5 or earlier releases, delete the Agile home folder (by default, `<drive:>\Program Files\Agile Product Collaboration` or `<drive:>\Program Files\Agile Anywhere`).

4 If you are using Agile Product Collaboration 8.5 or earlier releases, and if any of the following files appear in the `WINNT\system32` folder after you have removed the Agile software, you must delete them:

   - agccb.dll
   - AgileAPI.dll
   - agiledate.dll
   - agiledl.dll
   - AgileObjects.dll
   - AgileReport.dll

   - AgPCS.dll
   - APMsg32.dll
   - formeditocx.ocx
   - redlinectrl.dll
   - reportmanager.dll

5 After removing the previous Agile releases from all servers, restart all servers where the Agile system was installed.

Upgrading to Agile Advantage 2006

This section provides upgrade instructions from Agile 8.0 SP5 (85085), 8.0 SP6 (85086), 8.5 SP2 (85085), 8.5 SP3 (85086) and Agile Advantage releases, including Agile Advantage 2005, Agile Advantage 2005 SP1 and Agile Advantage 2005 SP2 to Agile Advantage 2006 and Agile Advantage 2006 SP1.

This section also provides instructions for APM upgrades from Agile Advantage releases, including Agile Advantage 2005, Agile Advantage 2005 SP1 and Agile Advantage 2005 SP2.

Important Spyware and virus software packages can inhibit the ability to automatically configure Agile Advantage 2006. Make sure you disable these tools before upgrading Agile Advantage 2006.

You should also close any other open applications, including Microsoft Outlook.

To upgrade the Agile database to Agile Advantage 2006:

1 Before you export from Oracle 8.1.7 run the `oracle_averifyxxx.sql` script which corresponds to your database version by logging into SQL*Plus as the Agile user to check for database integrity and data errors.

Note Contact Agile Advantage Support for the latest "Averify" script corresponding to your database version.

2 Spool the file and check for any errors. If it looks correct, continue to the next step. If there are errors, contact Agile Advantage Support for the correct fix and information, then run the scripts provided by Agile Advantage Support.

3 Run the `oracle_averifyxxx.sql` script again, to make sure there are no errors in the database that was given to you.

Note The `oracle_averifyxxx.sql` script corresponds to the one you located in Step 1.

4 Export your Agile database using the appropriate export script:
```
exp system/manager@<Database Service Name> owner=agile
file=d:\agilebackup\agileverxxx.dmp
log=d:\agilebackup\agileverxxx.log
```

Note If you purchased Agile Program Management (APM) in Agile Advantage 2005, backup this database too by using the appropriate export script (the default APM schema name is "pmuser"):
```
exp system/manager@<Database Service Name> owner=pmuser
file=d:\agilebackup\apmverxxx.dmp
log=d:\agilebackup\apmverxxx.log
```

5 After you have successfully exported your previous Agile database, you need to copy the database .dmp file to the new Agile Oracle 10g Release 2 database server. Moreover, you need to install the Tools folder that includes the required upgrade scripts.

Note You must not include spaces in the file path where the database .dmp file is copied to.

Note To install the Agile Tools folder, run the `DB.exe` tool and select **Install Agile Tools Folder** option from the **Database Setup** window.

Note You must not import the database *prior* to the upgrade process. `AutoUpgrade2006.exe` will import the database into Oracle 10g Release 2 for the upgrade process.

6 Open a **Command Prompt** window on the computer that has Oracle 10g Release 2 installed.

Note For further information about installing Oracle 10g Release 2, see the *Agile Advantage 2006 Installation and Maintenance Guide.*

a Go to `<drive:>\Program Files\Agile Advantage 2006\Tools`

b Run `AutoUpgrade2006.exe`

c Enter the correct parameters to start the upgrade process:

   • Database service name: `agil`, by default

   • Database system username: `system`, by default

   • Database system password: `manager`, by default

d A prompt message appears: "Do you want to upgrade your current schema without exporting it? [Y/N]. Note: This is applicable for schema DBVER.2006.00.0298 or higher."

   Note If your schema is prior to DBVER.2006.00.0298 (which is prior to Agile Advantage 2006) then enter "N". If your schema is DBVER.2006.00.0298 or higher, then you can enter "Y" provided that the database is already imported into the database instance.

   • The PRM database dump file location: this should be the `<drive:>\agilebackup\filename.dmp` of the Agile database dump copied from the current production system

   • The PRM schema name to import: `agile`, by default

- A system message appears, "Do you want to upgrade an APM Schema". Click **Yes** if you licensed, installed and used APM in Agile Advantage 2005; Otherwise click **No**.

- The APM database dump file location: this should be the `<drive:>\agilebackup\filename.dmp` of the APM database dump copied form the current production system.

- The APM schema name to be imported: `pmuser`, by default

- The drive of the UNDO tablespace for upgrading: `D:`, by default.

Note Use the current disk drive where Oracle data is installed. Make sure the drive letter is followed by a colon (i.e., `<drive>:`), otherwise the UNDO tablespace will not be created.

- Enter the Agile Advantage 2006 dump file location: this should be the `<drive:>\agilebackup\filename.dmp` (by default, `D:\agilebackup\agile2006.dmp`) of the Agile database dump after upgrading to Agile Advantage 2006.

Note After the upgrade process is complete, this file will be imported by running the `DB.exe` tool and selecting the **Import Existing Agile Database** option from the **Database Setup** window.

- Press **Enter** as required.

- You will be required to enter your Agile Advantage 2006 server license key to complete the upgrade process. This is only if you are upgrading from a database version that is prior to DBVER.2006.00.0298 (Agile Advantage 2006).

7 Verify the upgrade process log files:

Important   If you cannot interpret upgrade log files to determine if the upgrade process was successful, contact Agile Advantage Support for assistance. Failure to examine the log files and to take action on any failures may lead to significant issues in Agile Advantage.

   a   Open the **AutoUpgrade2006.log** file located in
   `<drive:>\Program Files\Agile Advantage`
   `2006\Tools\AutoUpgrade2006.log`

   Note   Note the Agile Advantage 2006 username exported on the bottom of the log file (e.g., `agile_tmp_001`). You will need to know the dmp Agile username while importing the database in the following steps.

   b   Resolve any issues before proceeding

   c   If required, contact Agile Advantage Support to help interpret the results

 8   Import the new Agile Advantage 2006 database:

Important   All Agile Advantage databases must be imported using the Agile Advantage **Database Setup** tool (`DB.exe`) to ensure proper functionality.

   a   Follow the steps on importing an existing database under "Importing an Existing Agile Database" on page B-17 in Appendix B of the *Agile Advantage 2006 Installation and Maintenance Guide*.

   b   When you are prompted to stop all Agile Advantage services before continuing, select **Yes** (you need to stop the Apache Tomcat service as well). When you are prompted to support Advanced Search, and if you intend to use the Full Text Search (FTS) feature, click **Yes**. If this is the first import after the database upgrade, you are prompted to enter the user to be imported in the **Username** field, i.e., `agile_tmp_001` (see Figure 3-1 "Select Import File"). The `agile_tmp_001` value is the schema name assigned during the `AutoUpgrade2006.exe` upgrade process.

Figure 3-1:   Select Import File
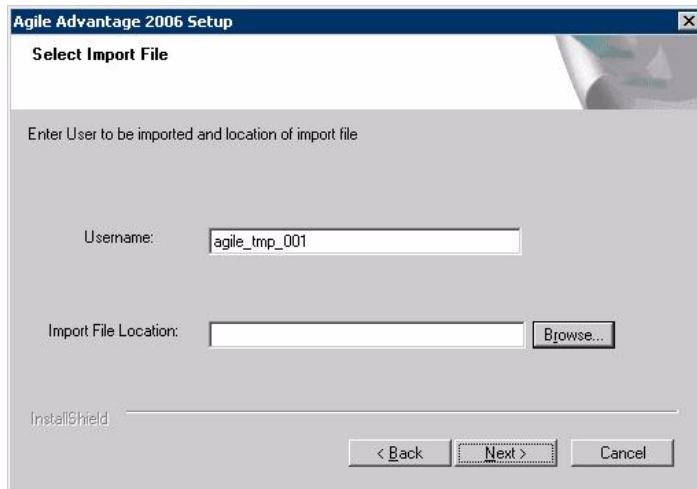
Note   If any errors are reported during the import process, verify the log files located under the `<drive>:>\agile temp\db_configure` folder. You will need to sort the log files in this folder by **Date Modified** to ensure you are looking at the latest log file.

c   When the **Select DMP File Location** dialog appears, select the `<drive>:>\agilebackup\filename.dmp` Agile dump file automatically exported after running `AutoUpgrade2006.exe`.

9   Run "Averify" on your Agile Advantage 2006 database, and address any issues with Agile Advantage Support.

Note   Download the latest "Averify" file from `http://sme.agile.com/support/login.asp` to your `<drive>:>\Program Files\Agile Advantage 2006\Tools` folder.

Important   All "Averify" errors should be corrected before using the Agile Advantage system in production or in test, as these errors can cause functional errors in Agile Advantage.

   a   Login to SQL*Plus on the Oracle server (using `agile/tartan@agil`, or any relevant account) by choosing **Start | Programs | Oracle - OraDb10g_home1 | ApplicationDevelopment | SQL Plus**.
The SQL window opens.

   b   Before running the script, create a spool file to record and contain the results from issuing the SQL script. At the SQL prompt type the following:
```
spool d:\agilebackup\oracle_averify2006.lst
```

Note   The file with the LST extension is any filename that you want to use to identify the file that will contain these results. It is best and easiest to give the LST file the same name as the filename that is attached to the SQL file.

You can also specify a drive or location other than what is shown in the previous example. The location specified is where the spool file will be saved.

   c   Run the verification script with the following command:
```
@d:\agilebackup\oracle_averify2006.sql
```
You should see some results from executing this script.
Once the script is complete, you should see another SQL prompt.

   d   Type `spool off` to turn off spooling, then open the spool file in a text editor and check for errors. If errors are detected, contact Agile Customer Support for assistance.

   e If you are upgrading from Agile Advantage 2006 SP1 to Agile Advantage 2006 SP2, you must run the `SP1SP2_Supplier_Fix.sql` fix script:

     i Download the `SP1SP2_Supplier_Fix.sql` script from the Agile Advantage Support web site at `http://sme.agile.com/support/login.asp` to your local drive (e.g., `D:\`).

     ii Make sure you are still logged into **SQL*Plus** on the Oracle server (using `agile/tartan@agil`, or any relevant account). At the SQL prompt, run the fix script with the following command:
`@D:\SP1SP2_Supplier_Fix.sql`
The message "PL/SQL procedure successfully completed." is displayed.

10 Reindex the files in the Agile Vault to enable the Full Text Search (FTS) capability.

   Note If you purchased the Advanced Document Management license, and it was enabled prior to the upgrade process, run the `ReFTSIndex.exe` tool after you complete your database upgrade. For more information, see the section entitled "Configuring Oracle Full Text Search" in the *Agile Advantage 2006 Installation and Maintenance Guide*.

     Note Before running the `ReFTSIndex.exe` tool, make sure that FTS is enabled by logging into Agile Administrator and setting the **Enable File Content Indexing** field to **Yes** in the **Preferences | Full Text Search** node.

The database is now upgraded to Agile Advantage 2006.

Registry Changes for Distributed iFS

If you have a distributed iFS system, you must change some registry values on each computer where iFS is installed.

1 Open a **Command Prompt** window and type `regedit.exe` or `regedt32.exe`.

2 To check the registry entries for Agile Advantage, open the folder structure **HKEY_LOCAL_MACHINE | SOFTWARE | Agile Advantage** and select **AgileiFS**.

3 Double-click each of the following entries, and change the **Value data** field to the specified value:

```
RemoteConnectTimer = 60
RemoteResponseTimer = 60
```

Note The **60** value represents seconds. You can increase this value if a remote iFS is far away or if network speed is slow.

4 Close the registry.

Resetting Agile Services

1 You must reset Agile services on *all* computers where Agile server components are installed:

   a Choose **Start | Settings | Control Panel | Administrative Tools**.

   b Double-click the **Services** icon.

   c Select the Agile Advantage eHub service and click **Startup**.

   d Select **Automatic** as the startup type, and then click **OK**.

   e Repeat this process for each Agile service (i.e., Agile Advantage Listener, Agile Advantage iFS, Agile Advantage ChangeCAST). Do the same for both the Apache Tomcat and IIS Admin Service services.

   f Close the **Services** dialog box.

2 If you have licensed and use Agile ChangeCAST, proceed to Chapter 4, "Migrating to Agile ChangeCAST 2006" to complete the Agile upgrade.

3 When complete, restart the Agile eHub computer.

Note If you have recently restarted Agile Advantage eHub, services will be unavailable until the eHub is completely loaded. This could take several minutes depending on the number of resources that must load before the eHub.

If the Agile Advantage eHub does not start, there might be a problem with the Oracle database. You should first check the Windows Application Event Log to determine the failure reason, and correct it. You should then confirm your Oracle configuration settings, and that your Agile database is using the schema you specified during the Agile Advantage eHub installation. Contact your Agile Solutions Consultant or Agile Customer Support if the problem persists.

CHAPTER 4

Migrating to Agile ChangeCAST 2006

This guide describes migrating to Agile ChangeCAST 2006. It includes these topics:

- ❑ *Overview*
- ❑ *Starting ChangeCAST*
- ❑ *Importing Profiles from Previous Release of ChangeCAST*
- ❑ *Auditing and Validating the Imported Profiles*
- ❑ *Reinstating the Former Transfer Log*
- ❑ *Effective Date and Obsolete Date*
- ❑ *Troubleshooting*

Note Because Agile ChangeCAST 2006 is critical for communicating change order and part master data to plant ERP systems, you must take great care to ensure that all ChangeCAST profiles and maps are reviewed and backed up properly prior to the migration. The steps in the following sections will ensure success.

Overview

Before installing the ChangeCAST upgrade on your production server, you should test it within a test environment. This lets you research and resolve any problems or confusion without disturbing production environments, people, and business-critical ERP processes.

Prepare a fully operational test server that is a clone of your production ChangeCAST server. It should be identical in every way, including the operating system, drive partitions, directory structure, processing speed, and Oracle and eHub releases, if they exist on the same server as ChangeCAST.

Creating an identical structure ensures that all tests and research will apply exactly as they would to your production environment.

Creating A Series of ECOs and MCOs for Testing Purposes

Create at least two changes (ECO and MCO) in the Agile Advantage Windows or Web Client that will be used as test cases, and make a note of their change numbers. Make sure that the ECO contains at least one affected item that has full redlines for BOM and AML data. Make sure that the MCO contains at least one affected item that has full redlines for AML data. The ChangeCAST output files for both changes will be used as a baseline for comparison to a similar ChangeCAST 8.5 output files for the same changes later.

1 Create and release both changes that contain item data, BOM data, AML data, and change data.

2 Have the current release of ChangeCAST process the changes. Make note of the AGL files produced.

3 Retrieve the AGL files from the ChangeCAST Out directory (or the designated output directory, if different).

4 Print and backup the AGL files.

Reviewing the AGL Files

The AGL files produced from the test changes are complete examples of correct and properly processed changes. The structure of these files is exactly what your ERP adapter expects to receive. Set the files aside. You will compare them with similar files produced by Agile ChangeCAST 2006.

Creating Profile Reports

For each profile in ChangeCAST, you can print four reports that provide all configuration and programmed settings. Print out these reports for each profile:

❏ Attributes report — lists all designated ERP field attributes.

❏ Mappings report — lists all current Agile to ERP field mappings.

❏ Settings report — lists all current transfer file format settings.

❏ Transfer options report — lists all target destination and communication settings.

Set these reports aside. They are the record of configuration for each migrated profile. If you need to make alterations to a profile once it has been converted into the new ChangeCAST format, these reports will help determine and restore all original settings.

Backing Up the Current ChangeCAST Directory

Locate the current ChangeCAST directory on the server and copy all contents (including all .agc and .agx files). To store these copied files and folders, create the following directory:

```
D:\ChangeCAST Migration
```

This directory now contains a full backup of all profile libraries, transfer logs, error logs, and output files generated from previous transfers. If the upgrade process fails, these files may be used to restore the previous release of ChangeCAST.

Starting ChangeCAST

You are now ready to start the ChangeCAST service. Perform the following steps:

1   Open the **Services** window.

2   Start the Agile ChangeCAST service.

3   A prompt appears, asking if you would like to restore a backup profile. Click **No**.

   Note   If you click **Yes**, you receive an error message because there is currently no AGX backup file. The previous release of ChangeCAST used AGC profile libraries. AGX is the new profile library format. A backup file will be created after ChangeCAST is put into service.

4 The **ChangeCAST Login** dialog box appears. Enter your username and password, and click **OK**.

5 The message "The profile Library is empty. A default profile will be added" appears. It states that the ChangeCAST profile library is empty and declares that a blank default profile will be added automatically. This is normal. Click **OK**.

6 The main **ChangeCAST** window appears. It has the same look and feel as in previous releases of ChangeCAST.

At this point, ChangeCAST is installed and connecting properly to the eHub. Continue to the next section to import and configure all profiles from the previous release ChangeCAST.

Importing Profiles from Previous Release of ChangeCAST

You are now ready to import the former ChangeCAST profile and restore it to full functionality within the current environment. Perform the following steps:

1 Start ChangeCAST and log in.

2 Choose **Profile | Import**.

The **Importer/Converter** wizard appears.

3 Accept the default option (AGC), and click **Next**.

An **Open** dialog box appears.

4 Browse to the ChangeCAST Migration folder created earlier (see page 4-3), select the **ChangeCAST.agc** file, then click **Open**. The AGC file is the profile library from the former instance of ChangeCAST.

Step 2 of the wizard appears. It lists all profiles in the selected ChangeCAST.agc file.

5 Verify that all profiles are present, check the profiles that you want to import, and click **Next**.

Step 3 of the wizard appears.

6 To maintain the former settings and integrity of the profiles being imported, accept the default selections. The options are described below. Click **Finish** to import the profiles.

• **Change Order Transfer Setup** (use the recommended option)

Keep transfer state settings (recommended) — profile integrity is maintained.

Set all change orders as transferred (not recommended) — history is abandoned.

Set all change orders as NOT transferred (not recommended) — history is abandoned.

- **Profile Library Options** (either one of these options is sufficient)

Add the new profiles to the Profile Library (recommended) — adds profiles to existing library.

OVERWRITE the profile library (recommended) — creates a new library.

The conversion and import are complete. You should be at the ChangeCAST main window, and the profiles that you selected for import should be listed in the Profile pane.

When you get to this point, your former ChangeCAST profiles have been successfully imported and converted to the new AGX format. Proceed to the next section to enable and test all imported profiles.

Auditing and Validating the Imported Profiles

After you import a profile, it must be audited, validated, and tested to verify its integrity. Follow these steps:

1 Select the profile that was imported in the previous section.

2 Choose **Profile | Audit**.

The audit function reviews the profile and compares all mapped Agile fields to designated ERP tables. Most newly imported profiles fail the audit and return an **Error Log** dialog box, as in the following figure. This is normal.

3 To pass the audit, the profile must go through a validation step with the Edit Mapping function. Click **OK** to close the **Error Log** dialog box.

4 Choose **Mapping | Edit Mapping**.

The **Field Mappings** window appears and shows all Agile to ERP field mappings for the selected profile.

- If the **Field Mappings** dialog box appears with no errors or alert prompts, give the mapping a cursory review and click **OK**. Clicking **OK** validates the mappings.

- If your profile contains conditional mappings, you may receive the following messages before the **Field Mappings** dialog box appears. This is normal.

5   A Mappings Analysis message states which mapped line number needs to undergo an additional validation step. Note the mapping number, and click **OK**.

6   A Conditional Mappings message follows, stating that some ERP tables are not mapped properly to related Agile tables. Click **OK**.

7   When the **Field Mappings** dialog box appears for the Mapped Fields table, select the mapping line number that appeared in the Mapping Analysis message earlier, then click **Edit Mapping**.

     The **Map Condition** dialog box appears.

8   No information changes are required. Click **OK**.

9   The **Agile Table Type** dialog box appears. No information changes are required. Click **OK**. When you click **OK**, the condition goes through an automated system validation.

10   At this point, you should be back at the **Field Mappings** dialog box. Click **OK** to close the dialog box.

11   You can now re-audit the profile. Choose **Profile | Audit**.

     The Audit function reviews the profile again and should confirm that the profile is responding normally and that all mapped tables are valid. If they are, you should receive the message "No problems were found on the current profile."

     If the audit returns no errors, your profiles are in good shape. If you receive additional audit errors, perform steps 2 through 4 again until all conditional rows are validated. If you continue to receive errors, contact Agile Advantage Support or your third-party adapter partner.

12   Double-check all transfer settings for the profile. To do so, open the **Transfer Settings** dialog box (choose **Transfer | Protocol**). Review at least the following information on the tabs of this dialog box:

- **Protocol** — Make sure that the Output directory points to the correct location. If you are using FTP, review all FTP settings and verify the connection.

- **Notification** — Make sure that all appropriate administrative personnel are designated.

- **Schedule** — Make sure that the proper transfer schedule is set.

- **Files** — Make sure that all file naming conventions are correct for AGL output files.

- **Application Adapter** — If you are using an application adapter, make sure that it is designated.

13 Enable the profile by clicking the **Enable** button. ChangeCAST reviews the entire change history in the Oracle database to verify system integrity and to prepare the profile for initial use. This could take up to 30 minutes, depending on the size of your database.

14 Print all reports for the profile: Attributes, Mappings, Settings, and Transfer Options. Compare these profile reports to the reports that you printed with the old release of ChangeCAST (see page 4-3) to verify that everything is programmed and configured identically.
If both versions of reports are in sync with each other, your new ChangeCAST system is in spectacular shape.

15 Reset the transfer flag of the test changes (ECO and MCO) that you created earlier, then click the **Transfer Now** button to transfer the changes a second time.

16 As before, several AGL files are produced from the transfers. Open and print these AGL files, and compare them with the original AGL files generated by the old release of ChangeCAST.

After you compare printouts of the files, compare them electronically, if possible, using a file comparison tool. (If your company does not have a file comparison tool, consider getting one.)

Note   This is the most important test to verify that the profile is working properly. The two AGL files should be identical.

17 As a final test, upload the new AGL files as you normally would into your ERP system. Your ERP adapter typically performs all validations against ChangeCAST files. If they upload with no errors, you can consider the profile to be in good working order.

The profile is now fully validated and ready for use.

Reinstating the Former Transfer Log

After you have completed upgrading ChangeCAST, importing your profiles, validating them, and finally enabled them, you will notice that the Transfer Log window is empty. This is because the old transfer log file is not part of the automated migration process. If you would like to import the old transfer history log so that all former Change transfer histories can be maintained and added to, follow these steps:

1 Stop the ChangeCAST service.

2 Locate the ChangeCAST Migration folder created earlier that contains the backup of all files from the previous release of ChangeCAST.

3 Open the file Transfer.txt, and copy all contents.

4 Locate the new ChangeCAST folder, and open the file TransferLog.txt.

5 Paste the copied contents of Transfer.txt into TransferLog.txt. Save and close the file.

6 Start the ChangeCAST service.

You should now see the former transfer history in the Transfer Log window.

> **Note**   To migrate the former Error log, follow the preceding steps for the error log files.

Effective Date and Obsolete Date

Table 4-1 shows how ChangeCAST outputs the Effective Date from the ECO Affected Items table.

Table 4-1:   Effective Date

Type of Revision	BOM Row	Output
No previous revision	Added, Deleted, Changed or Unmodified	Effective Date
Previous revision	Added Row	Effective Date
Previous revision	Changed Row	NULL (##)
Previous revision	Deleted Row	NULL (##)
Previous revision	Unmodified Row	NULL (##)

Table 4-2 shows how ChangeCAST outputs the Obsolete Date from the ECO Affected Items table.

Table 4-2:   Obsolete Date

Type of Table	Type of Revision	BOM Row	Output
Non-BOM	Any type	Any type	Obsolete Date
BOM Table	No previous revision	Added, Deleted, Changed or Unmodified	NULL (##)
BOM Table	Previous revision	Added Row	NULL (##)
BOM Table	Previous revision	Changed Row	Obsolete Date
BOM Table	Previous revision	Deleted Row	Obsolete Date
BOM Table	Previous revision	Unmodified Row	NULL (##)

Troubleshooting

This section provides additional troubleshooting issues and tips.

❑ After you import a profile, you must validate it before it can be used.

❑ Avoid mixing certain types of Agile tables.

Pending changes cannot be mixed in a single table with AML, and BOM fields cannot be included in the same table when AML fields are mapped. Also, do not mix Attachments tables with BOM or AML tables.

❑ Email notification may not be sent when ChangeCAST cannot start the application adapter.

If ChangeCAST fails to start the application adapter, an error is recorded in ErrorLog.txt, but no corresponding email notification is sent to the users.

❑ You cannot combine the SYS_LINECOUNT system flag with other field or flags in the same map condition.

❑ Saving a map condition for a profile that has some table attributes without map conditions may cause fields to appear disarranged.

When you close and reopen the **Map Condition** dialog box, the fields that were not mapped appear disarranged. This also occurs when there are several tables in the same profile. This issue does not affect ChangeCAST output.

❑ No data is transferred when only specific system flags are mapped.

If an ERP table has fields mapped to specific system flags, and no other fields are mapped, the output file is deleted, because no data has been printed. This happens with the following flags:

- SYS_ROOTITEMID
- SYS_ROOTCHANGEID
- SYS_CLASSNAME
- SYS_HAS_PENDING_CHANGES
- SYS_HAS_PREVIOUS_REVISION
- SYS_HAS_REVISIONS

To correct this issue, map an additional field to the ERP table.

❑ If you try to upload duplicate files on the FTP site, the files are not uploaded even though the output files are generated.

If the output files that you upload have the same names as files that are already on the FTP site, the files will not be uploaded. However, the files will have been generated, and the transfer flags will have been set to Transferred. When output files have the same autonumber, many copies will be generated.

❑ If ChangeCAST is set up to transfer AGL files via FTP, files that are sent again with the same filename are not uploaded.

If ChangeCAST has sent an AGL file to the FTP site, and then re-sends a file with the same name, the file will not be uploaded.

To correct this issue, check the FTP site before transferring changes, and delete any files that have the same name as the file that will be uploaded.

❑ Minimize on system startup does not work if ChangeCAST is on a remote server.

If ChangeCAST is set to Minimize On Boot, and it is on its own remote server, it will not start before you log in to Windows.

To correct this issue, move ChangeCAST to the Agile Advantage eHub server.

❑ When ChangeCAST is set to SFFET (single file for each table) and you use it to transfer a group of files using FTP, some empty files may be uploaded.

Empty tables are not deleted, so some files with 0 bytes may be transferred and uploaded.

To correct this issue, copy the files to a local folder, and then manually send them to the target FTP destination.

❑ When an ECO is unreleased and re-released, the transferred flag is not reset automatically.

   If your Agile Advantage system allows ECOs to be released multiple times, be aware that the Transferred flag is not reset automatically; therefore, when the ECO is released for the second time, ChangeCAST does not transfer it automatically. The Transferred flag still indicates that the ECO has already been transferred.

CHAPTER 5

Upgrading Agile Clients

This chapter describes the basic process for upgrading to Agile Advantage clients after upgrading the Agile Advantage server. This chapter includes the following topics:

❑ *Updating Agile Advantage Clients*
❑ *Pre-installation Requirements for Agile Advantage Clients*

Updating Agile Advantage Clients

Once you have upgraded Agile services and user information, you must upgrade existing Agile clients. As this is a major release with significant changes in all server components, it will not be possible to use the Agile Client Software Update (ACSU) program to update client machines. Agile Advantage 2006 will need to be manually installed on client computers.

The Agile Advantage 2006 Installation folder can be shared with the user for an interactive upgrade. If the user does not have the correct Operating System rights and privileges to install the software, a user with Administrator privileges can still use this folder to download the Installer file and perform the setup process on the user's desktop.

For information about performing interactive client installations, see the *Agile Advantage 2006 Installation and Maintenance Guide*. All future Service Packs and Hot Fixes will be distributed using the ACSU program.

Pre-installation Requirements for Agile Advantage Clients

There are no pre-installation requirements for client machines. Unlike previous releases, there is no JRE requirement for the client. Agile View & Markup is now done via an ActiveX control. Microsoft Internet Explorer 6.0 Service Pack 1 or higher is required for viewing from the Web Client. It must be configured with the appropriate security settings (see "Installing and Updating Client Components" in Chapter 7 of the *Agile Advantage 2006 Installation and Maintenance Guide*).

You *must* uninstall prior versions of Agile on the client machine to remove significant legacy files and registry entries on the machine. For more information on installing releases, see the *Agile Advantage 2006 Installation and Maintenance Guide*.

Important   The client computer must be restarted immediately after any Agile Advantage component is installed or uninstalled.

APPENDIX A

Database Management

It is important to protect your Agile Advantage data and system files from loss. This appendix describes basic backup and recovery strategies and gives specific information about applying them to your Agile Advantage system used with Oracle products.

The instructions in this chapter are for system and database administrators who need to manage the Agile Advantage database. The following topics are discussed:

❑ *Database Maintenance and Performance*

❑ *Backing Up the Database*

❑ *Importing Agile Advantage 2006 Database*

❑ *Exporting the Database*

❑ *Deleting an Instance and the Database Files*

❑ *Database Recovery*

❑ *Running Scripts*

❑ *Defining Database Properties*

❑ *Backing Up Previous Versions of Oracle*

❑ *Removing Previous Versions of Oracle*

❑ *Installing Oracle 10g Release 2 and Migrating the Database Instance*

Database Maintenance and Performance

For more information on database maintenance and performance, see "Database Maintenance and Performance" under the "Database Management" section in the *Agile Advantage 2006 Installation and Maintenance Guide*.

Backing Up the Database

For more information on backing up databases, see "Backing Up the Database" under the "Database Management" section in the *Agile Advantage 2006 Installation and Maintenance Guide.*

Importing Agile Advantage 2006 Database

For detailed information on importing an Agile Advantage 2006 database, please see "Importing an Existing Agile Database" on page B-17 in Appendix B of the *Agile Advantage 2006 Installation and Maintenance Guide*.

Exporting the Database

For details on exporting the full Oracle database, as well as exporting the Agile Advantage schema from Oracle, see "Exporting the Database" in the *Agile Advantage 2006 Installation and Maintenance Guide*.

Deleting an Instance and the Database Files

For details on deleting an instance in Oracle 8.1.7 and in Oracle 10g Release, see "Deleting an Instance and the Database Files" in the *Agile Advantage 2006 Installation and Maintenance Guide*.

Database Recovery

For more information on database recovery, see "Database Recovery" under the "Database Management" section in the *Agile Advantage 2006 Installation and Maintenance Guide.*

Running Scripts

For more information on running scripts, see "Running Scripts" under the "Database Management" section in the *Agile Advantage 2006 Installation and Maintenance Guide.*

Defining Database Properties

For more information on defining database properties, see "Defining Database Properties" under the "Database Management" section in the *Agile Advantage 2006 Installation and Maintenance Guide.*

Backing Up Previous Versions of Oracle

For older versions of Oracle, backup the Agile database using the export utility before uninstalling the older versions of Oracle.

A full backup of the database is recommended.

To back up an Oracle 8.0.5 database, use the following command:

```
Exp80 system/manager @<Database Service Name, default =
agil> file=c:\expagilefull60.dmp log=c:\expagile60.log
full=y
```

To back up an Oracle 8.1.6 database, use the following command:

```
Exp system/manager @<Database Service Name, default = agil>
file=c:\expagilefull61.dmp log=c:\expagile61.log full=y
statistics=none
```

Removing Previous Versions of Oracle

Note   Whenever you are working with Oracle, log into Windows Server 2003 as an Administrator for the appropriate domain, and use the Oracle login name and password that provide Administrator privileges.

Note   Agile Advantage is not certified or tested on Microsoft Windows Server 2003 x64 Editions.

You must remove any previous Oracle components before you can install Oracle 10g Release 2. Before installing and configuring Oracle 10g Release 2:

1 Ensure that all system users are logged out.

2 Stop and disable any Agile, Oracle, Apache Tomcat and BEA Weblogic services.

    a Choose **Start** | **Settings** | **Control Panel**.

    b Double-click the **Administrative Tools** icon and then double-click the **Services** icon.

    c For each Agile service in the Services dialog box, select and stop the service.

    d Locate and stop all Oracle services by selecting each service containing the name Oracle and clicking **Stop**.

    e You must also stop the Apache Tomcat service if it is running, as well as BEA Weblogic services.

    f Close the **Services** dialog box.

3 Remove Oracle 8.1.7 using the Oracle Universal Installer.

    a Choose **Start** | **All Programs** | **Oracle Installation Products | Universal Installer**.

    b The welcome page appears. Click **Deinstall Products**.

    c On the **Inventory** window, expand Independent Products. Select all the products and click **Remove**.

    d Click **Yes** if you are prompted about deleting any components or the database.

    e The **Remove** window appears and the deinstallation starts.

    Important After removing Oracle, you must stop all Oracle services and delete any residual Oracle files and folders.

        You may have to restart the computer after deinstalling Oracle before you are able to delete residual Oracle folders and registry keys.

4 Exit from the Oracle Universal Installer when the process completes.

5 Delete any Oracle folder remaining on the computer.

6 Delete any Oracle key settings in the registry.

> **Important** Delete only Oracle folders in the registry as deleting any other folders can result in severe system errors.

a Choose **Start** | **Run**.

b Type **regedit** in the Open field of the **Run** dialog box.
The **Registry** window opens.

c Open **My Computer** | **HKEY_CLASSES_ROOT**.

d Within the **HKEY_CLASSES ROOT** folder, look for any **.ora** folders and folders starting with **ora** and **oracle** and delete them. You have to scroll through the subfolder.

e Open **My Computer** | **HKEY_CURRENT_USER** | **Software**.

f Look for an **Oracle** folder. If you find one, select and delete the folder.

g Open **My Computer** | **HKEY_LOCAL_MACHINE** | **SOFTWARE**.

h Look for an **Oracle** folder. If you find one, select and delete the folder.

i Open **My Computer** | **HKEY_LOCAL_MACHINE** | **SYSTEM**.

j Open each folder containing the words **ControlSet**. Within each of these folders appears a **Services** folder. Within each **Services** folder, delete any folder containing the word **Oracle**.

k Delete the Oracle directory, driver:\Program Files\Oracle directory.

l Choose **Registry** | **Exit**.

m Empty the **Recycle Bin**.

7 Restart the computer.

Installing Oracle 10g Release 2 and Migrating the Database Instance

Install Oracle on the database server by following the instructions under "Installing and Configuring Oracle 10g Release 2 and the Agile Advantage 2006 Database", page 2-7 in the *Agile Advantage 2006 Installation and Maintenance Guide*.

Creating the AGIL Database Instance

1 Create and configure the AGIL database instance following the instructions under "Creating and Configuring the Agile Database Instance", page 2-15 in the *Agile Advantage 2006 Installation and Maintenance Guide.*

> **Important** Oracle must be installed a drive other than the `C:` drive e.g. the `D:` drive.

APPENDIX B

Changing Passwords

This appendix describes how to change registry entries, create a new database password, and change the secure word used between the Agile Advantage eHub and Agile Advantage iFS. It includes these topics:

❏ *Using Regedit*

❏ *Using DBReg*

❏ *Using swdreg*

Using Regedit

Use "regedit" to verify the entries in the Windows registry. For more information, refer to Appendix A, "Agile System Maintenance" in the *Agile Advantage 2006 Installation and Maintenance Guide.*

Using DBReg

Use DBReg to set the password of the Agile Advantage database schema. For more information, refer to Appendix A, "Agile System Maintenance" in the *Agile Advantage 2006 Installation and Maintenance Guide.*

Using swdreg

The secure word can be modified only using the `swdreg.exe` utility. For more information, refer to Appendix A, "Agile System Maintenance" in the *Agile Advantage 2006 Installation and Maintenance Guide.*

Caution!   If you have been using non-default settings, failure to update these entries can cause problems with opening and using the database.

Index

This page is blank