

**Oracle® User Productivity Kit**  
Upgrade

E35076-01  
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**ORACLE®**

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E35076-01

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# 1 Upgrade the Developer from 2.5, 2.6, or 2.7

If you have version 2.5, 2.6, or 2.7 installed, you must upgrade to 3.6.1 before you can upgrade to 11.1. See the *Upgrade* manual for one of those versions for information. Since 11.1 must be installed in a new location, it can exist on the same machine as any previous version.

## **Usage Tracking**

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

---

## 2 Upgrade the Developer from 3.1.x, 3.5, or 3.5.1

If you have version 3.1.x, 3.5, or 3.5.1 installed, you must upgrade to 3.6.1 before you can upgrade to 11.1. See the *Upgrade* manual for one of those versions for information. Since 11.1 must be installed in a new location, it can exist on the same machine as any previous version.

### **Usage Tracking**

You cannot upgrade your Usage Tracking database. A new database is required, and you cannot convert data or reports from the previous version into the new version. In addition, a database from version 3.1.x, 3.5, or 3.5.1 cannot track data for a Player package published in 11.1.

---

## 3 Upgrade the Developer from 3.6.1 or 11.0

Before you upgrade from 3.6.1 or 11.0, you should take the following into consideration.

### Publishing Styles

Standard publishing styles will be replaced during the upgrade. If you have customized publishing styles, please note the following:

- Customized publishing styles for print formats will be upgraded. However, they will contain bookmarks that, while they still work, have been deprecated in this release. You may want to change these bookmarks on your own at some point. See the bookmark reference in *Customize Document Formats* in the Publish content section in the Content Development manual for more information.
- Customized publishing styles for other formats are not upgraded. Even if your customizations appear to still be available, you must delete them, recopy the appropriate styles from the publishing styles delivered with 11.1, and re-apply your customizations.
- Publishing settings files saved in 3.6.1 or 11.0 will work in 11.1.
- If you have created customized brands or categories, the categories will remain, but the brands must be reapplied.

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

### Templates

Standard templates will be replaced during the upgrade. Any new custom templates that you created in 3.6.1, or 11.0 will work in the new version. However, we recommend that you perform a manual comparison of the old template and the new templates and re-apply any necessary changes.

### Sound

The sound structure type was changed to .flv in 3.6.1, and the template sound is no longer used. Older sound files will not be converted. If you are upgrading from 3.6.1, there are no changes to sound files, and they should be preserved. Sound files exported from 3.6.1 or 11.0 can be imported into 11.1.

### Customized View Settings

Any changes made to standard views will be preserved. Also, any custom views that you have created in 3.6.1 or 11.0 will be preserved.

### User Interface Layout Preferences

These preferences will not be preserved.

### Most Recently Used (MRU) List

MRU lists for such things as the Start screen, the open list, the last save location, and the actions performed will be preserved.

### Custom Icons for Attachments

Any custom icons you created for attachments will be preserved.

### Permissions

Permissions will be preserved.

### Exported Content

Content exported to an .odarc file in 3.6.1 or 11.0 can be imported into 11.1.

## Localization Files

Localization export files exported from 3.6.1 or 11.0 can be imported into 11.1.

## Content Defaults

Content defaults will be preserved. In addition, content default files exported from 3.6.1 or 11.0 can be imported into 11.1.

## Player in Knowledge Pathways (Professional Edition only)

If you use Player content in Knowledge Pathways and you are upgrading from 3.6.1, you must also upgrade Knowledge Pathways to Knowledge Center. Player content from this version will not work in Knowledge Pathways, only Knowledge Center.

## Custom Reports

Custom reports created in Usage Tracking in 3.6.1 will be converted to the new Knowledge Center. Custom reports created in Knowledge Center in 11.0 will be preserved.

## Knowledge Center User Interface Customizations

Any customizations to the user interface for Knowledge Center must be reapplied.

# 3.1 Upgrade a Single User Installation

To upgrade a single user installation, install the new version and upgrade your profile.

 To upgrade from 3.6.1 or 11.0:

1. Follow the instructions in the *Installation & Administration* manual for a single user installation, and be sure to install the software in a different location.
2. Launch the 11.1 Developer. When you open your profile, you will be prompted to upgrade it. The content is copied into the new content location, and the content for the previous version, while still on your computer, can no longer be accessed with the profile.

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

# 3.2 Upgrade a Multi-User Installation

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

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

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

## 3.2.1 Upgrade the Server

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

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

1. From the Windows Start menu, open a Command Prompt window.

- To update the schema using the **AlterSchemaObjects.sql** script located in **\db scripts\ORACLE\Developer\Upgrade** in the software installation files, enter the following at the command prompt:

sqlplus - SQL\*Plus is the command line application for Oracle Database.

-s - Run SQL\*Plus without SQL\*Plus messaging.

<adminuser> - The administrative user for the instance of the Oracle server.

<adminpwd>@<instance> - The password for the administrative user and the name of the instance.

<scriptlocation>\<scriptname> - The path to the location of the script and the name of the script to be run.

schema\_owner - The schema owner name is limited to 20 characters.

password - The password used for the schema owner account and the schema\_app account.

**Statement with generic parameters:**

```
sqlplus -s <adminuser>/<adminpwd>@<instance> @"<script location>\<script name>" schema_owner password
```

**Example with default install parameters:**

```
sqlplus -s system/password@xe @"E:\Setup\db scripts\ORACLE\Developer\AlterSchemaObjects.sql" ODServer password
```

- Confirm the parameters and run the script.

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

- From the Windows Start menu, open a Command Prompt window.
- To upgrade the database using the **AlterDBObjects.sql** script located in **\db scripts\MSSQL\Developer\Upgrade** in the software installation files, enter the following at the command prompt:

sqlcmd - The command line application for the Microsoft Sequel server.

-E - Use a trusted connection to the Microsoft Sequel server. To use a login and password, use the -U <LOGINID> -P <password> parameters.

-S <servername> - The name of the Microsoft SQL server.

-i "<scriptfile>" - The path to the script file and the name of the script file.

-v DBOwner="<owner name>" - The database account that owns the database.

-v DBName="<database name>" - The name of the database to be upgraded.

**Statement with generic parameters:**

```
sqlcmd -E -S <servername> -i <scriptfile> -v DBOwner="<VALUE1>" -v DBName="<VALUE2>"
```

**Example with default install parameters:**

```
sqlcmd -E -S "mysqlserver" -i "E:\Setup\db scripts\MSSQL\Developer\AlterDBObjects.sql" -v DBOwner="ODServer" -v DBName="ODDevContent"
```

3. Confirm the parameters and run the script.
4. Confirm the parameters and run the script.
5. Close the Command Prompt window.

To upgrade the server with an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Developer Server** or **Developer Server and Client**.
- **Language Selection:** Choose the language for the Developer server and library. This sets the default language for the templates and publishing styles in the library.
- **Software Requirements:** Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.
- **Select Program Folder:** This screen appears if you selected **Server and Client** from the Configuration list on the Setup Type screen. You can indicate the desired program folder or accept the default.
- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, enter the virtual directory name used in the previous release. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.  
  
**Note:** The web server and the database server must be in the same local network.
- **Virtual Directory Options:** On the previous screen, you specified an existing virtual directory. On this screen, confirm that choice by selecting the **Replace existing virtual directory** option.
- **Database System:** Choose **Oracle Database**.
- **Oracle .NET Data Provider:** A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the **Path** field, enter the physical location to which you want to install the software. In the **Name** field, enter the name of the Oracle Home.

- **SQL Script Options:** If you have already run the scripts to update the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to update the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Oracle Database Login:** If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to update the schema and the tablespace. If the scripts have already been run to update the database, enter a user name, password and host string that has access to the user schema created to run the application. If the scripts have already been run, the Profile Credentials screen appears next.

**Note:** Host String represents the name you assign for TNS connectivity in the tnsnames.ora file. This typically identifies the machine, port number and SID of the Oracle database. If you need to connect to a remote Oracle database you will need to supply the host:port/service\_name; for example, "myservername:1521/orcl". In some environments a tnsname.ora might not be present. If you are not sure, it is highly recommended that you supply the host/service\_name or host:port/service\_name (if remote).

- **Schema Options:** If this screen appears, choose **Use existing schema** if you have already run the upgrade scripts, or **Update schema** if you have not run the scripts.
- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.
- **Folder permission:** The server or server and client installation needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation will fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

To upgrade the server with a Microsoft SQL Server database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Developer Server** or **Developer Server and Client**.
- **Language Selection:** Choose the language for the Developer server and library. This sets the default language for the templates and publishing styles in the library.
- **Software Requirements:** Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.
- **Select Program Folder:** This screen appears if you selected **Server and Client** from the Configuration list on the Setup Type screen. You can indicate the desired program folder or accept the default.
- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, enter the virtual directory name used in the previous release. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

**Note:** The web server and the database server must be in the same local network.
- **Virtual Directory Options:** On the previous screen, you specified an existing virtual directory. On this screen, confirm that choice by selecting the **Replace existing virtual directory** option.
- **Database System:** Choose **Microsoft SQL Server**.
- **SQL Script Options:** If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Microsoft SQL Server Login:** This screen appears if the scripts have not yet been run to upgrade the database. From the **Database server** list, select the desired Microsoft SQL server. If the scripts have not been run, select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server.
- **Select Microsoft SQL Server:** This screen appears if the scripts have been run to upgrade the database. Choose the server on which the existing database is installed.

- **Choose Database:** Select the existing database.
- **Database Options:** If this screen appears, choose **Use existing database** if you have already run the upgrade scripts, or **Update database** if you have not run the scripts.
- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.
- **Folder permission:** The server or server and client installation needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation will fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click Back to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

### 3.2.2 Upgrade the Client

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

When you launch the upgraded client for the first time, the behavior differs depending on the version from which you upgraded. If you are prompted to convert the existing profile, do so. If you are not prompted to convert your profile, you must create a new one.

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

### 3.2.3 Decrypt the Web Configuration Information

During the upgrade process, you will be required to re-enter information about the previous installation. This information is located in the web.config file. Depending on the version you are upgrading from, it may be encrypted.

To decrypt the configuration file contents, open a command prompt and use the Aspnet\_regiis tool with the following parameters:

- -pd switch, for decryption, followed by the name of the configuration element to be decrypted enclosed in quotes; in this case "connectionStrings"

- -app switch, to identify the application (virtual directory), followed by the name of the application (virtual directory) enclosed in quotes
- -site switch, to identify the site number where the application (virtual directory) resides, followed by the site ID or identifier enclosed in quotes; see below for more information on finding the site identifier

The following command decrypts the connectionStrings element in the Web.config file for the ASP.NET application (virtual directory) ODSContent. In the first example the application (virtual directory) is assumed to be from Web site 1 (most commonly the Default Web Site in IIS).

#### Generic syntax:

```
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -pd  
"connectionStrings" -app "<Virtualdirectory>" -site "<siteID or Identifier>"
```

#### Example using the Default Web Site:

```
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -pd  
"connectionStrings" -app "/ODSContent" -site "1"
```

#### Example when using a different Web Site:

```
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -pd  
"connectionStrings" -app "/ODSContent" -site "4567890"
```

#### Additional Reference:

<http://msdn.microsoft.com/en-us/library/k6h9cz8h%28VS.80%29.aspx>

### The Site ID or Identifier

The Web site is identified using the site number from the Internet Information Services (IIS) metabase. You can retrieve the site number from the INSTANCE\_META\_PATH server variable in the ServerVariables collection. For example, when IIS is installed, a Web site named "Default Web Site" is created as site 1. In pages served from that site, the INSTANCE\_META\_PATH server variable returns "/LM/W3SVC/1".

There are numerous ways to find this information, but the fastest way is through the Internet Information Services (IIS) Manager. In IIS6 the Site ID is also known as Identifier while in IIS 7 it is also known as ID.

1. Open Internet Information Services (IIS) Manager.
2. Click <machinename> (local computer).
3. Click Web Sites (IIS6) or Sites (IIS 7).

### Locate the Connection String Information

Once you have decrypted the connection string information in the web.config file, you can locate the information you will need to answer the prompts during the upgrade process. In an installation that accepts all default values, the web.config file is located in "C:\Program Files\User Productivity Kit\UPK Developer 36Server\Repository.WS".

Open the web.config file in any text editor. Locate the <connectionStrings> element. Within this element you see an <add> element which contains three attributes: "add", "connectionString" and "providerName". You need the "connectionString" attribute, which varies depending on whether you are using an Oracle Database server or a Microsoft SQL server.

- Oracle Database server  
The connection string is:  
Data Source=<hoststring>; User Id=<schema\_user>; Password=<password>

**Example:**

```
Data Source=orcl; User Id=ODServer_app; Password=mypassword;
```

The Data Source contains the host string used during the previous installation. Enter this information in the Host String field on the Oracle Database Login screen.

The User ID contains the schema user name created during the previous installation. Remove the "\_app" from the schema user name to get the schema owner name. Enter the schema owner information in the User Name field on the Choose Schema screen.

The Password contains the password for both the schema owner and schema user account. Enter this information in the Password field on the Choose Schema screen.

**Note:** It is very important that if you change the password for the schema user account, you also change the password for the schema owner account. The two passwords MUST always be the same.

- Microsoft SQL Server

The connection string is:

```
user id=<login id>; password=<password>;integrated security=false;data source=<server>;initial catalog=&quot;<database name>&quot;;
```

**Example:**

```
user id=ODServer; password=mypassword;integrated security=false;data source=(local);initial catalog=&quot;ODDevContent&quot;;;
```

The user id contains the database login id information. Enter this information in the Login ID field on the Choose Database screen.

The password contains the password for the login id. Enter this information in the Password field on the Choose Database screen.

The data source contains the name of the database server used during the previous installation. Enter this information in the Database server field on the Microsoft SQL Server Login screen.

The initial catalog contains the name of the database used during the previous installation. Enter this information in the Database name field on the Choose Database screen.

### 3.2.4 Encrypt the Web Configuration Information

After you decrypt and retrieve the information you need from the web.config file, it is highly recommended that you encrypt the web.config file for security.

To encrypt configuration file contents, open a command prompt and use the Aspnet\_regiis.exe tool with the following parameters:

- -pe switch, for encryption, followed by the name of the configuration element to be encrypted enclosed in quotes; in this case "connectionStrings"
- -app switch, to identify the application (virtual directory), followed by the name of the application (virtual directory) enclosed in quotes
- -site switch, to identify the site number where the application (virtual directory) resides, followed by the site ID or identifier enclosed in quotes; see the *Decrypt the Web Configuration* section for more information on finding the site identifier

The following command encrypts the connectionStrings element in the Web.config file for the ASP.NET application (virtual directory) ODSCContent. In the first example the application (virtual directory) is assumed to be from Web site 1 (most commonly the Default Web Site in

IIS). The encryption is performed using the RsaProtectedConfigurationProvider specified in the machine configuration.

**Generic syntax:**

```
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -pe  
"connectionStrings" -app "<Virtualdirectory>" -site "<siteID or Identifier>"
```

**Example when using the Default Web Site:**

```
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -pe  
"connectionStrings" -app "/ODSContent" -site "1"
```

**Example when using a different Web Site:**

```
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -pe  
"connectionStrings" -app "/ODSContent" -site "4567890"
```

**Additional Reference:**

<http://msdn.microsoft.com/en-us/library/k6h9cz8h%28VS.80%29.aspx>

### 3.3 Upgrade and SAP NetWeaver Portal

In this version, the Help Integration is no longer available for SAP NetWeaver Portal. Integration is available through SmartHelp only. If you want to record new content, a "mixed mode" of old and new context is not available. You must re-record the context IDs for your content using this version of Developer. See *Re-record Context IDs* in the Use the Topic Editor section of the Content Development manual for more information on how to do this. In addition, you should remove the pointer in the Portal Help link from your SAP NetWeaver Portal server.

### 3.4 Migrate to an Oracle Database

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

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

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

1. Upgrade your current installation on the Microsoft SQL server using the steps outlined above. Make sure that all authors have upgraded their client installations as well. This allows the system to update all of the standard styles and templates in the same environment. You will still need to update your customized publishing styles later.
2. Within the Developer, export all documents in the library into several .odarc files, including the System folder. This allows you to replicate your environment from the Microsoft SQL server to the Oracle Database server.
3. Export the content defaults.
4. Install a new instance of 11.1 with an Oracle Database server following the instructions in the *Installation & Administration* manual for installing a server. You can use the procedure to install the server and database at the same time, or you can follow the procedures for installing the Oracle Database first and then installing the server with an existing Oracle Database. When you install, make sure that you install

to a new location and virtual directory.

5. Have the authors create a new profile to log in to the new installation. If you are not using Windows authentication for the authors, log in to the new installation as an administrator and create user accounts for the authors.
6. Within the Developer, import the .odarc files you created in step 2 into the Oracle Database. Since you are importing .odarc files, you can overwrite the documents without causing technical issues.
7. Import the content defaults (step 3).
8. Re-apply any customizations to the publishing styles, basing them on the styles for 11.1.

## 4 Upgrade Usage Tracking and Knowledge Pathways Versions prior to 11.0

In releases prior to 11.0, the Professional edition included an additional product called Knowledge Pathways that provided sophisticated functionality for building and deploying courses, content tracking, and custom reporting. This program has been renamed and redesigned to help facilitate integration with the Developer that is included with the Standard edition. The Knowledge Center, as it is now named, is a centralized, web-based platform for content deployment, tracking and standard or custom reporting. There are two versions of the Knowledge Center:

- Standard - contains basic usage tracking and reporting.
- Professional - provides sophisticated user and content management, content organization and deployment, usage tracking and custom reporting.

The Designer tool has been removed and its functionality has been rebuilt in the Developer. The Manager and Title Manager tools and their functionality have been incorporated into the Manager component of the Knowledge Center.

The Usage Tracking tool from the Standard edition in previous releases has also been combined into the new Knowledge Center. This new application allows you to deploy content and manage users more easily through a new web-based interface.

### 4.1 Upgrade Usage Tracking

To upgrade an earlier version of Usage Tracking, you must convert the data into the Knowledge Center application. You can install Knowledge Center and convert the Usage Tracking database at the same time, or you can install Knowledge Center only and convert the Usage Tracking database later using the Usage Tracking Conversion utility. For more information about the Usage Tracking Utility, see the *Upgrade Usage Tracking with the Conversion Utility* section.

The installer converts the existing tracking data from Usage Tracking into Knowledge Center data by connecting to the Usage Tracking data source and pulling the data into the Knowledge Center data source. To make this connection, you can provide a web.config file from Usage Tracking, or you can supply the connection string that the current version of Usage Tracking uses to connect to its data.

When you upgrade Usage Tracking:

- All tracking data is converted and becomes a part of the new database.
- Any custom reports are converted and are available in the Reports Management application in Knowledge Center. See the *Reports Management* manual for more information.
- Users with administrator permissions in Usage Tracking are converted to Managers in Knowledge Center.
- Users with reporting permissions in Usage Tracking are converted to Reporters in Knowledge Center.
- All other users are preserved, with one exception. If you used NT authentication for Usage Tracking, and there are users, including reporters, who have never taken any content, the users will need to be recreated in Knowledge Center.
- All content must be republished in the new version of the Developer. You can publish content directly to the Knowledge Center server. See *Publish Content* in the Content Development manual for more information.

For more information about installing Knowledge Center, see *Install Knowledge Center* in the Installation and Administration manual.

To upgrade using an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Usage Tracking Conversion:** To upgrade Usage Tracking, select one of the Yes options on this screen. If you select the **Yes, get the connection string from the Usage Tracking Web.config file** option, click the **Browse** button and navigate to the location of the Web.config file in the current Usage Tracking installation. If you select **Yes, enter the connection string manually** and choose **System.Data.OracleClient**. Enter the connection string in this form: Data Source=<Oracle\_sid>; User ID=<username>; Password=<password>. Supply the Oracle\_sid, username, and password for the server on which the Usage Tracking database is installed.
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

**Note:** The authentication mode selected here must match the authentication mode that was used for Usage Tracking.

**Note:** The web server and the database server must be in the same local network.

- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.

- **Database System:** Choose **Oracle Database**.
- **Oracle .NET Data Provider:** A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the Path field, enter the physical location to which you want to install the software. In the Name field, enter the name of the Oracle Home.
- **SQL Script Options:** If you have already run the scripts to create the Knowledge Center database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Oracle Database Login:** If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to update the schema and the tablespace. If the scripts have already been run to update the database, enter the schema owner user name, password and host string that has already been updated with the scripts. If the scripts have already been run, the Add Content Root screen appears next.

**Note:** Host String represents the name you assign for TNS connectivity in the tnsnames.ora file. This typically identifies the machine, port number and SID of the Oracle database. If you need to connect to a remote Oracle database you will need to supply the host:port/service\_name; for example, "myservname:1521/orcl". In some environments a tnsname.ora might not be present. If you are not sure, it is highly recommended that you supply the host/service\_name or host:port/service\_name (if remote).

- **Choose Schema:** If the scripts have not been run, specify the name of the existing tablespace from the previous version, enter the schema owner user name and password, and confirm the password; this user will be associated with the tablespace. If the scripts have been run, this screen does not appear.
- **Schema Options:** If the scripts have not been run, choose **Update schema**. If the scripts have been run, choose **Use existing schema**.
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at this time**.
- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the

system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password. You must also enter a first and last name for the profile. The Middle initial and E-mail address are optional.

- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No**, ignore permission and attempt to continue installation to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

To upgrade using a Microsoft SQL database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.

- **Usage Tracking Conversion:** To upgrade Usage Tracking, select one of the Yes options on this screen. If you select the **Yes, get the connection string from the Usage Tracking Web.config file** option, click the Browse button and navigate to the location of the Web.config file in the current Usage Tracking installation. If you select **Yes, enter the connection string manually** and choose **System.Data.SqlClient**. Enter the connection string in this form: user id=<username>;password=<password>;initial catalog=<name of existing database>;data source=<server name>;IntegratedSecurity=false. Supply the username, password, database name, and server name of the existing Usage Tracking installation.
- **Choose Web Site:** The Available websites list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the Application (virtual directory) name box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

**Note:** The authentication mode selected here must match the authentication mode that was used for Usage Tracking.

**Note:** The web server and the database server must be in the same local network.
- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.
- **Database System:** Choose **Microsoft SQL Server**.
- **SQL Script Options:** If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Microsoft SQL Server Login:** If the scripts have been run, this is the **Select Microsoft SQL Server** screen, and you only need to select the Microsoft SQL server on which you ran the scripts. If the scripts have not been run, select the desired Microsoft SQL server and then select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server.
- **Choose Database:** Accept the default name for the database or enter a custom name. If you have already run the scripts, you must use the name of the database you created. Specify an existing database user ID and password and confirm the password, if necessary, or, if you have not run the scripts, you can also specify a new database user ID and password. The installer will create the login, if necessary, grant the login access to the database, and give it the appropriate permissions. If you ran the scripts to create the database, you must use the login you created.
- **Database Options:** This screen only appears if the scripts have already been run. Choose **Use existing database**.
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at**

**this time.**

- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.
- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings. **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

## 4.2 Upgrade Usage Tracking with the Conversion Utility

To upgrade an earlier version of Usage Tracking, you must convert the data into the Knowledge Center application. If you have already installed Knowledge Center, you can convert the Usage Tracking data with this utility.

The existing tracking data is converted from Usage Tracking into Knowledge Center data by connecting to the Usage Tracking data source and pulling the data into the Knowledge Center data source. To make this connection, you can provide a web.config file from Usage Tracking, or you can supply the connection string that the current version of Usage Tracking uses to connect to its data.

When you upgrade Usage Tracking:

- All user tracking data is converted.
- Any custom reports are converted and are available in the Reports Management application in Knowledge Center. See the *Reports Management* manual for more information.
- Users with administrator permissions in Usage Tracking are converted to Managers in Knowledge Center.
- Users with reporting permissions in Usage Tracking are converted to Reporters in Knowledge Center.
- All other users are preserved, with one exception. If you used NT authentication for Usage Tracking, and there are users, including reporters, who have never taken any content, the users will need to be recreated in Knowledge Center.
- All content must be republished in the new version of the Developer. You can publish content directly to the Knowledge Center server. See *Publish Content* in the Content Development manual for more information.

To upgrade Usage Tracking with the conversion utility, navigate to the installed files for Knowledge Center. In a default installation, the path is: C:\Program Files\User Productivity Kit\Knowledge Center\Web Server\KData\bin. This path may vary based on your installation. Launch the UsageTrackingConversionWin.exe file. During conversion, you will proceed through these screens in the utility.

- **Knowledge Center:** You must log in and establish a connection to the Knowledge Center server to which you want to convert the Usage Tracking data. Select or add the server to the list, and then enter the login credentials for the account with sufficient rights (Admin or Manager).
- **Get Usage Tracking Database Connection String:** You can provide a web.config file from Usage Tracking, or you can supply the connection string that the current version of Usage Tracking uses to connect to its data. If you select the **Get the connection string from the Usage Tracking Web.config file** option, click the **Browse** button and navigate to the location of the Web.config file in the current Usage Tracking installation. If you select **Enter the connection string manually**, choose **System.Data.OracleClient**. Enter the connection string in this form: Data Source=<Oracle\_sid>; User ID=<username>; Password=<password>. Supply the Oracle\_sid, username, and password for the server on which the Usage Tracking database is installed.
- **Usage tracking Conversion settings:** Specify a location in which to save the conversion log file. You can also choose to log the failed records only.
- **Conversion Progress:** Displays the progress of the conversion. When conversion is completed, you can choose to open the log file when you click **Finish**.

### 4.3 Upgrade Knowledge Pathways only

To upgrade Knowledge Pathways, you install Knowledge Center, convert the database, and upgrade the content root. All data, including users, user groups, and knowledge paths is preserved. You must use a separate utility, launched from the Developer, to upgrade the content in the content root. This utility imports the content and republishes it to the upgraded content root.

If you have modified .cus files to customize the user interface of Knowledge Pathways, the customizations will still work in Knowledge Center. However, you should verify your

customizations in the new version. There may also be additional modifications, and therefore .cus files, to be modified for Knowledge Center.

To upgrade using an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Usage Tracking Conversion:** Choose **No, this is a new installation**.
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory)** name box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode. You can choose different virtual directories or use the existing ones from the previous installation; however, be aware that if you use different virtual directories, the old directories will no longer work.

**Note:** The web server and the database server must be in the same local network.

- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.
- **Database System:** Choose **Oracle Database**.
- **Oracle .NET Data Provider:** A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the **Path** field, enter the physical location to which you want to install the software. In the **Name** field, enter the name of the Oracle Home.

- **SQL Script Options:** If you have already run the scripts to create the Knowledge Center database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Oracle Database Login:** If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to update the schema and the tablespace. If the scripts have already been run to update the database, enter a user name, password and host string that has access to the user schema created to run the application. If the scripts have already been run, the Profile Credentials screen appears next.

**Note:** Host String represents the name you assign for TNS connectivity in the tnsnames.ora file. This typically identifies the machine, port number and SID of the Oracle database. If you need to connect to a remote Oracle database you will need to supply the host:port/service\_name; for example, "myservname:1521/orcl". In some environments a tnsname.ora might not be present. If you are not sure, it is highly recommended that you supply the host/service\_name or host:port/service\_name (if remote).

- **Choose Schema:** If the scripts have not been run, specify the name of the existing tablespace from the previous version, enter a user name and password, and confirm the password; this user will be associated with the tablespace. If the scripts have been run, this screen does not appear.
- **Schema Options:** If the scripts have not been run, choose **Update schema**. If the scripts have been run, choose **Use existing schema**.
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at this time**.
- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password. You must also enter a first and last name for the profile. The Middle initial and E-mail address are optional.
- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before

the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

**Note:** The next step you should do is to convert the content in the content root. See *Convert Knowledge Pathways Content* in this manual for more information.

To upgrade using a Microsoft SQL database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you of which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Usage Tracking Conversion:** Choose **No, this is a new installation**.
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is

given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode. You can choose different virtual directories or use the existing ones from the previous installation; however, be aware that if you use different virtual directories, the old directories will no longer work.

**Note:** The web server and the database server must be in the same local network.

- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.
- **Database System:** Choose **Microsoft SQL Server**.
- **SQL Script Options:** If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Microsoft SQL Server Login:** If the scripts have been run, this is the **Select Microsoft SQL Server** screen, and you only need to select the Microsoft SQL server on which you ran the scripts. If the scripts have not been run, select the desired Microsoft SQL server and then select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server.
- **Choose Database:** If you have already run the scripts, you must use the name of the database you created. Specify an existing database user ID and password and confirm the password, if necessary, or, if you have not run the scripts, you can also specify a new database user ID and password. The installer will create the login, if necessary, grant the login access to the database, and give it the appropriate permissions. If you ran the scripts to create the database, you must use the login you created.
- **Database Options:** If the scripts have not been run, choose **Update database**. If the scripts have been run, choose **Use existing database**.
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at this time**.
- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.
- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

**Note:** The next step you should do is to convert the content in the content root. See *Convert Knowledge Pathways Content* in this manual for more information.

## 4.4 Upgrade Both Knowledge Pathways and Usage Tracking

To upgrade Knowledge Pathways, you install Knowledge Center, convert the database, and upgrade the content root. All data, including users, user groups, and knowledge paths is preserved. You must use a separate utility, launched from the Developer, to upgrade the content in the content root. This utility imports the content and republishes it to the upgraded content root.

If you have modified .cus files to customize the user interface of Knowledge Pathways, the customizations will still work in Knowledge Center. However, you should verify your customizations in the new version. There may also be additional modifications, and therefore .cus files, to be modified for Knowledge Center.

At the beginning of the upgrade process, you can also choose to convert Usage Tracking. The installer converts the existing tracking data from Usage Tracking into Knowledge Center data by connecting to the Usage Tracking data source and pulling the data into the Knowledge Center data source. To make this connection, you can provide a web.config file from Usage Tracking, or you can supply the connection string that the current version of Usage Tracking uses to connect to its data.

When you upgrade Usage Tracking:

- All tracking data is converted and becomes a part of the new database.

- Any custom reports are converted and are available in the Reports Management application in Knowledge Center. See the *Reports Management* manual for more information.
- Users with administrator permissions in Usage Tracking are converted to Managers in Knowledge Center.
- Users with reporting permissions in Usage Tracking are converted to Reporters in Knowledge Center.
- All other users are preserved, with one exception. If you used NT authentication for Usage Tracking, and there are users, including reporters, who have never taken any content, the users will need to be recreated in Knowledge Center.
- All content must be republished in the new version of the Developer. You can publish content directly to the Knowledge Center server. See *Publish Content* in the Content Development manual for more information. For more information about installing Knowledge Center, see *Install Knowledge Center* in the Installation and Administration manual.

To upgrade using an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you of which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Usage Tracking Conversion:** To upgrade Usage Tracking, select one of the Yes options on this screen. If you select the **Yes, get the connection string from the Usage Tracking Web.config** file option, click the **Browse** button and navigate to the location of the Web.config file in the current Usage Tracking installation. If you select **Yes, enter the connection string manually** and choose **System.Data.OracleClient**. Enter the connection string in this form: Data Source=<Oracle\_sid>; User ID=<username>; Password=<password>. Supply the Oracle\_sid, username, and password for the server on which the Usage Tracking database is installed.

- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

**Note:** The authentication mode selected here must match the authentication mode that was used for Usage Tracking.

**Note:** The web server and the database server must be in the same local network.

- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.
- **Database System:** Choose **Oracle Database**.
- **Oracle .NET Data Provider:** A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the **Path** field, enter the physical location to which you want to install the software. In the **Name** field, enter the name of the Oracle Home.
- **SQL Script Options:** If you have already run the scripts to create the Knowledge Center database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Oracle Database Login:** If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to create the schema and the tablespace. If the scripts have already been run to create the database, enter a user name, password and host string that has access to the user schema created to run the application. If the scripts have already been run, the Profile Credentials screen appears next.
 

**Note:** Host String represents the name you assign for TNS connectivity in the tnsnames.ora file. This typically identifies the machine, port number and SID of the Oracle database. If you need to connect to a remote Oracle database you will need to supply the host:port/service\_name; for example, "myservername:1521/orcl". In some environments a tnsname.ora might not be present. If you are not sure, it is highly recommended that you supply the host/service\_name or host:port/service\_name (if remote).
- **Choose Schema:** If the scripts have not been run, specify the name of the existing tablespace from the previous version, enter a user name and password, and confirm the password; this user will be associated with the tablespace. If the scripts have been run, this screen does not appear.
- **Schema Options:** If the scripts have not been run, choose **Update schema**. If the scripts have been run, choose **Use existing schema**.
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at this time**.

- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password. You must also enter a first and last name for the profile. The Middle initial and E-mail address are optional.
- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

**Note:** The next step you should do is to convert the content in the content root. See *Convert Knowledge Pathways Content* in this manual for more information.

To upgrade using a Microsoft SQL database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you of which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Usage Tracking Conversion:** To upgrade Usage Tracking, select one of the Yes options on this screen. If you select the **Yes, get the connection string from the Usage Tracking Web.config file** option, click the **Browse** button and navigate to the location of the Web.config file in the current Usage Tracking installation. If you select **Yes, enter the connection string manually** and choose **System.Data.SqlClient**. Enter the connection string in this form: user id=<username>;password=<password>;initial catalog=<name of existing database>;data source=<server name>;IntegratedSecurity=false. Supply the username, password, database name, and server name of the existing Usage Tracking installation.
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

**Note:** If you are upgrading, the authentication mode selected here must match the authentication mode that was used for Usage Tracking.

**Note:** The web server and the database server must be in the same local network.

- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.
- **Database System:** Choose **Microsoft SQL Server**.
- **SQL Script Options:** If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.

- **Microsoft SQL Server Login:** If the scripts have been run, this is the **Select Microsoft SQL Server** screen, and you only need to select the Microsoft SQL server on which you ran the scripts. If the scripts have not been run, select the desired Microsoft SQL server and then select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server.
- **Choose Database:** If you have already run the scripts, you must use the name of the database you updated. Specify an existing database user ID and password and confirm the password, if necessary, or, if you have not run the scripts, you can also specify a new database user ID and password. The installer will create the login, if necessary, grant the login access to the database, and give it the appropriate permissions. If you ran the scripts to create the database, you must use the login you created.
- **Database Options:** If the scripts have not been run, choose **Update database**. If the scripts have been run, choose **Use existing database**.
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at this time**.
- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.
- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

**Note:** The next step you should do is to convert the content in the content root. See *Convert Knowledge Pathways Content* in this manual for more information.

## 4.5 Upgrade the Knowledge Pathways Database Manually

You can manually update the Knowledge Pathways database by running a script on the database server before you run the installer to upgrade the web server.

**Warning:** It is necessary to run the SQLPlus command line application for Oracle and the SQLCmd command line application for Microsoft SQL from the folder location that contains the script you are running.

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

1. From the Windows Start menu, open a Command Prompt window.
2. Using the `cd` command, change into the folder where the scripts are located in the software installation files; for example, if the files are located on the C: drive in a temp folder:

```
cd c:\temp\setup\db scripts\ORACLE\KnowledgeCenter
```

3. Enter **sqlplus**, and at the SQLPlus command prompt, enter the user name and password of the administrator account to connect to the Oracle database.
4. To update the schema using the **AlterSchemaObjects.sql** script, enter the following at the command prompt:

<scriptname> - The path to the location of the script and the name of the script to be run.

schema\_owner - The schema owner name is limited to 20 characters.

password - This will be the password used for the schema owner account and the schema\_app account (this account is created automatically).

tablespace - The name of the tablespace to be upgraded.

temp\_tablespace - The tablespace name with \_temp.

**Statement with generic parameters:**

```
@ "<script name>" schema_owner password tablespace temp_tablespace
```

**Example with default install parameters:**

```
@ "AlterSchemaObjects.sql" KUSER KUSER KMASTER KMASTER_TEMP
```

5. Confirm the parameters and run the script.
6. Close the command prompt window.

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

1. From the Windows Start menu, open a Command Prompt window.
2. Using the `cd` command, change into the folder where the scripts are located in the software installation files; for example, if the files are located on the C: drive in a temp folder:

```
cd c:\temp\setup\db scripts\MSSQL\KnowledgeCenter
```

3. To upgrade the database using the **AlterDBObjects.sql** script, enter the following at the command prompt:

sqlcmd - The command line application for the Microsoft Sequel server.

-E - Use a trusted connection to the Microsoft Sequel server. To use a login and password, use the `-U <LOGINID> -P <password>` parameters.

-S <servername> - The name of the Microsoft SQL server.

-i "<scriptfile>" - The path to the script file and the name of the script file.

-v DBName="<database name>" - The name of the database to be upgraded.

**Statement with generic parameters:**

```
sqlcmd -E -S <servername> -i <scriptfile> -v DBName="<VALUE1>"
```

**Example with default install parameters:**

```
sqlcmd -E -S "mysqlserver" -i "AlterDBObjects.sql" -v DBName="KMASTER"
```

4. Confirm the parameters and run the script.
5. Close the Command Prompt window.

## 4.6 Convert Knowledge Pathways Content

After you have converted the Knowledge Pathways database and content root structure, you must convert the content. The conversion process imports the content into the Developer and then publishes it to the Knowledge Center. To connect to the Knowledge Center server, you must know the URL to launch it and have the user name and password of an account with sufficient rights (manager or administrator) to import content.

**Warning:** The conversion utility only converts the published copy of the title in Knowledge Pathways. Any titles still in development, that is, in the local folder in the content root, will not be converted.

The conversion utility is located in the Developer. You can convert all titles at once or choose specific titles. If a title has already been converted, it appears in grey in the list, and it cannot be selected again.

 To convert Knowledge Pathways content, launch the Developer and then:

1. On the **Tools** menu, point to **Convert** and choose **Knowledge Center Content**. Click **Next**.
2. In the log in dialog box, click **Add**, enter the URL of the server that contains the content to be converted, and click **OK**.
3. Enter a user name and password and click **OK**.
4. Select the titles to be converted and click **OK**.

**Note:** Once you have completed converting the content, you have the option of running a script to consolidate the upgraded database and remove tables, stored procedures, and other items that are no longer needed. See Consolidate the Database in this manual for more information.

## 4.7 Consolidate the Database

There is an optional script that can be run to consolidate the Knowledge Center database after upgrading. This script removes items such as tables and stored procedures that are no longer needed. This optional step should only be run after you have:

- Installed the Developer
- Installed Knowledge Center and updated the database to the current version
- Converted the Knowledge Pathways content to Knowledge Center

 To consolidate the Oracle database:

1. From the Windows Start menu, open a Command Prompt window.
2. Run the **Remove55OldTables.sql** script located in **\db scripts\ORACLE\KnowledgeCenter\Upgrade** in the software installation files, enter the following at the command prompt:

sqlplus - SQL\*Plus is the command line application for Oracle Database.

-s - Run SQL\*Plus without SQL\*Plus messaging.

<schema\_owner> - The schema owner for the tablespace.

<password>@<instance> - The password for the schema owner.

<scriptlocation>\<scriptname> - The path to the location of the script and the name of the script to be run.

**Statement with generic parameters:**

```
sqlplus -s <schema_owner>/<password>@<instance> @"<script location>\<script name>"
```

**Example with default install parameters:**

```
sqlplus -s kuser/password@xe @"E:\Setup\db scripts\ORACLE\KnowledgeCenter\Upgrade\Remove55OldTables.sql"
```

3. Confirm the parameters and run the script.
4. Close the command prompt window.

 To consolidate the Microsoft SQL database:

1. From the Windows Start menu, open a Command Prompt window.
2. Run the **Remove55OldTables.sql** script located in **\db scripts\MSSQL\KnowledgeCenter\Upgrade** in the software installation files, enter the following at the command prompt:

sqlcmd - The command line application for the Microsoft Sequel server.

-E - Use a trusted connection to the Microsoft Sequel server. To use a login and password, use the -U <LOGINID> -P <password> parameters.

-S <servername> - The name of the Microsoft SQL server.

-i "<scriptfile>" - The path to the script file and the name of the script file.

-v DBName="<database name>" - The name of the database to be consolidated.

**Statement with generic parameters:**

```
sqlcmd -E -S <servername> -i <scriptfile> -v DBName="<VALUE2>"
```

**Example with default install parameters:**

```
sqlcmd -E -S "mysqlserver" -i "E:\Setup\db  
scripts\MSSQL\KnowledgeCenter\Upgrade\Remove55OldTables.sql" -v  
DBName="KPMaster"
```

3. Confirm the parameters and run the script.
4. Close the Command Prompt window.

## 5 Upgrade Knowledge Center from 11.0

To upgrade Knowledge Center from 11.0 to 11.1, you need to update the database and the web server. To do both of these tasks at once, you can run the setup program and select the existing virtual directory and database that contains your data. You can also manually update the database by running a script on the database server before you run the installer to upgrade the web server.

**Note:** All content should be republished from the Developer to Knowledge Center.

If you have modified .cus files to customize the user interface of Knowledge Center 11.0, the customizations will still work in 11.1. However, you should verify your customizations in the new version. There may also be additional modifications, and therefore .cus files, to be modified.

**Note:** If you installed the Knowledge Center User Import Utility in the previous version, you cannot update it. You must install the new version.

To upgrade using an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Usage Tracking Conversion:** Choose **No, this is a new installation**.
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory)** name box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode. You can choose different virtual directories or use the existing ones from the previous installation; however, be aware that if you use different virtual directories, the old directories will no longer work.

**Note:** The web server and the database server must be in the same local network.

- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.
- **Virtual Directory Options:** If you selected the existing virtual directories on the Choose Web Site screen, this screen appears.
- **Database System:** Choose **Oracle Database**.
- **Oracle .NET Data Provider:** A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the **Path** field, enter the physical location to which you want to install the software. In the **Name** field, enter the name of the Oracle Home.
- **SQL Script Options:** If you have already run the scripts to create the Knowledge Center database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Oracle Database Login:** If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to update the schema and the tablespace. If the scripts have already been run to update the database, enter the schema owner user name, password and host string that has already been updated with the scripts. If the scripts have already been run, the Add Content Root screen appears next.

**Note:** Host String represents the name you assign for TNS connectivity in the tnsnames.ora file. This typically identifies the machine, port number and SID of the Oracle database. If you need to connect to a remote Oracle database you will need to supply the host:port/service\_name; for example, "myservername:1521/orcl". In some environments a tnsname.ora might not be present. If you are not sure, it is highly recommended that you supply the host/service\_name or host:port/service\_name (if remote).

- **Choose Schema:** If the scripts have not been run, specify the name of the existing tablespace from the previous version, enter the schema owner user name and password, and confirm the password; this user will be associated with the tablespace. If the scripts have been run, this screen does not appear.
- **Schema Options:** If the scripts have not been run, choose **Update schema**. If the scripts have been run, choose **Use existing schema**.
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at this time**.
- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the

existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password. You must also enter a first and last name for the profile. The Middle initial and E-mail address are optional.
- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

To upgrade using a Microsoft SQL database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key:** Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).
- **Welcome:** From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.
- **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
- **Setup Requirements:** Specific services are required for installation. If the services are not running, this screen appears notifying you of which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

**Professional Edition only:** The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition,

the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

- **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
- **Usage Tracking Conversion:** Choose **No, this is a new installation.**
- **Choose Web Site:** The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode. You can choose different virtual directories or use the existing ones from the previous installation; however, be aware that if you use different virtual directories, the old directories will no longer work.

**Note:** The web server and the database server must be in the same local network.

- **Web Site Options:** This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.
- **Virtual Directory Options:** If you selected the existing virtual directories on the Choose Web Site screen, this screen appears.
- **Database System:** Choose **Microsoft SQL Server.**
- **SQL Script Options:** If you have already run the scripts to update the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to update the database, click the **No, the scripts have not been run, let the installer run them** option.
- **Internet Information Services Option:** During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.
- **Microsoft SQL Server Login:** If the scripts have been run, this is the **Select Microsoft SQL Server** screen, and you only need to select the Microsoft SQL server on which you ran the scripts. If the scripts have not been run, select the desired Microsoft SQL server and then select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server.
- **Choose Database:** If you have already run the scripts, you must use the name of the database you updated. Specify the database user ID and password and confirm the password, if necessary, or, if you have not run the scripts, you can also specify a new database user ID and password. The installer will create the login, if necessary, grant the login access to the database, and give it the appropriate permissions.
- **Database Options:** If the scripts have not been run, choose **Update database.** If the scripts have been run, choose **Use existing database.**
- **Add Content Root:** The content root name is the name of the virtual directory to be created for the content root. Choose **No, additional content root is not needed at this time.**

- **Application Pool User:** The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you use an existing account, specify the user name, including the domain, and the existing password for the account. If you create a new local Windows user, enter the user name and a password. Note that you can only create a local Windows user account from this screen; you must create a new domain user manually outside of the installation process.

- **Profile Credentials:** If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.
- **Folder permission:** The Knowledge Center needs certain permissions to complete installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
- **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.
- **Installshield Wizard Complete:** During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

## 5.1 Upgrade the Knowledge Center Database Manually

You can manually update the Knowledge Center database by running a script on the database server before you run the installer to upgrade the web server.

**Warning:** It is necessary to run the SQLPlus command line application for Oracle and the SQLCmd command line application for Microsoft SQL from the folder location that contains the script you are running.

 To upgrade the Oracle database manually before you upgrade the server:

1. From the Windows Start menu, open a Command Prompt window.

- Using the `cd` command, change into the folder where the scripts are located in the software installation files; for example, if the files are located on the C: drive in a temp folder:

```
cd c:\temp\setup\db scripts\ORACLE\KnowledgeCenter
```

- Enter **sqlplus**, and at the SQLPlus command prompt, enter the user name and password of the administrator account to connect to the Oracle database.
- To update the schema using the **AlterSchemaObjects.sql** script, enter the following at the command prompt:

<scriptname> - The path to the location of the script and the name of the script to be run.

schema\_owner - The schema owner name is limited to 20 characters.

password - This will be the password used for the schema owner account and the schema\_app account (this account is created automatically).

tablespace - The name of the tablespace to be upgraded.

temp\_tablespace - The tablespace name with \_temp.

**Statement with generic parameters:**

```
@ "<script name>" schema_owner password tablespace temp_tablespace
```

**Example with default install parameters:**

```
@ "AlterSchemaObjects.sql" KUSER KUSER KMASTER KMASTER_TEMP
```

- Confirm the parameters and run the script.
- Close the command prompt window.

 To upgrade the Microsoft SQL database manually before you upgrade the server:

- From the Windows Start menu, open a Command Prompt window.
- Using the `cd` command, change into the folder where the scripts are located in the software installation files; for example, if the files are located on the C: drive in a temp folder:

```
cd c:\temp\setup\db scripts\MSSQL\KnowledgeCenter
```

- To upgrade the database using the **AlterDBObjects.sql** script, enter the following at the command prompt:

sqlcmd - The command line application for the Microsoft Sequel server.

-E - Use a trusted connection to the Microsoft Sequel server. To use a login and password, use the `-U <LOGINID> -P <password>` parameters.

-S <servername> - The name of the Microsoft SQL server.

-i "<scriptfile>" - The path to the script file and the name of the script file.

-v DBName="<database name>" - The name of the database to be upgraded.

**Statement with generic parameters:**

```
sqlcmd -E -S <servername> -i <scriptfile> -v DBName="<VALUE1>"
```

**Example with default install parameters:**

```
sqlcmd -E -S "mysqlserver" -i "AlterDBObjects.sql" -v DBName="KMASTER"
```

4. Confirm the parameters and run the script.
5. Close the Command Prompt window.

