

Oracle® User Productivity Kit
Upgrade

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ORACLE®

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1 Upgrade the Developer from Versions Prior to 3.6.1

If you have version 2.5, 2.6, 2.7, 3.1.x, 3.5, or 3.5.1 installed, you must upgrade to 3.6.1 before you can upgrade to 12.1. See the *Upgrade* guide for one of those versions for information. Since 12.1 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 3.6.1, 11.0, or 11.1

Before you upgrade from 3.6.1, 11.0, or 11.1, 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 are upgraded. Customized print styles 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 guide for more information.
- If you have created customized brands or categories, the categories 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 are replaced during the upgrade. Any new custom templates that you created should 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 are not converted. If you are upgrading from 3.6.1, 11.0, or 11.1, there are no changes to sound files, and they should be preserved. Sound files exported from these versions cannot be imported into 12.1.

Customized View Settings

Any changes made to standard views are preserved. Also, any custom views that you have created are preserved.

User Interface Layout Preferences

These preferences are not 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 are preserved.

Custom Icons for Attachments

Any custom icons you created for attachments are preserved.

Permissions

Permissions are preserved.

Exported Content

Content exported to an .odarc file in 3.6.1, 11.0, or 11.1 can be imported into 12.1.

Localization Files

Localization export files exported from 3.6.1, 11.0 or 11.1 cannot be imported into 12.1.

Content Defaults

Content defaults will be preserved. In addition, content default files exported from 3.6.1, 11.0, or 11.1 can be imported into 12.1.

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 does not work in Knowledge Pathways, only Knowledge Center.

Custom Reports

Custom reports created in Usage Tracking in 3.6.1 are converted to the new Knowledge Center. Custom reports created in Knowledge Center are preserved.

Interface Customizations in Knowledge Center

You need to re-apply your customizations. You can copy the .cus files and apply them to the new version.

2.1 Upgrade the Server

To install the Developer server, you must have administrator privileges to the computer on which you are installing it, or at least have necessary permissions to install software. 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.

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 proceed through these screens in the Install Wizard.

1. **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).
2. **Welcome:** From this screen, you can access the Installation and Upgrade guides in Adobe Acrobat format.
3. **Setup Type:** From the **Configuration** list, select **Developer Server** or **Developer Server and Client**.
4. **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.
5. **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.
6. **Microsoft .NET Framework Update:** Choose to install Microsoft .NET Framework 4.5. Note that a reboot might be required. This screen only appears if the .NET Framework 4.5 needs to be installed.
7. **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.

8. **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
9. **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.
10. **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.
11. **URL Settings:** The URL of the web site is determined by the installer and used to populate the initial Developer library. However, what the installer determines and what the actual URL should be may not be the same, so you can modify it as necessary. All DNS and proxy settings should be considered before changing the value. If no changes are needed, or if you are unsure of the settings, the URL should be left as it is currently set.
12. **Database System:** Choose **Oracle Database**.
13. **Oracle ODBC Components:** The installer requires a 32-bit ODBC driver to be installed to connect to the Oracle Database. If there is no ODBC driver, the installer installs one. This screen does not appear if an ODBC driver already exists. In the **Path** field, enter the physical location to which you want to install the Oracle ODBC components.
14. **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.
15. **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).
16. **Choose Schema:** Specify the tablespace name you want to upgrade, user name, and password and confirm the password. The user name is limited to 20 characters. The tablespace name is the name of the tablespace that is created or used during the installation; the user name is the user name that is created or associated with the schema. This user is for the Developer application to read and write information to the database. If you want to specify a different Oracle application user, deselect the **Create Application User Based on These Credentials** option. The Application User screen appears next.

In previous versions, the application user name and password was always based on the schema owner account created. Checking or unchecking the checkbox in this case

does not attempt to create anything new; rather the installer verifies the default account was created previously. If it was not, the Application User screen appears and you are prompted for the application user credentials.

17. **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.
18. **Profile Credentials:** Enter the login for an account in the administrator group in Developer. This account must already exist in the Library.
19. **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.
20. **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
21. **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
22. **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 proceed through these screens in the Install Wizard.

1. **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).
2. **Welcome:** From this screen, you can access the Installation and Upgrade guides in Adobe Acrobat format.
3. **Setup Type:** From the **Configuration** list, select **Developer Server** or **Developer Server and Client**.
4. **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.
5. **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.
6. **Microsoft .NET Framework Update:** Choose to install Microsoft .NET Framework 4.5. Note that a reboot might be required. This screen only appears if the .NET

Framework 4.5 needs to be installed.

7. **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.
8. **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
9. **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.

10. **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.
11. **URL Settings:** The URL of the web site is determined by the installer and used to populate the initial Developer library. However, what the installer determines and what the actual URL should be may not be the same, so you can modify it as necessary. All DNS and proxy settings should be considered before changing the value. If no changes are needed, or if you are unsure of the settings, the URL should be left as it is currently set.
12. **Database System:** Choose **Microsoft SQL Server**.
13. **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.
14. **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 and 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.
15. **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.
16. **Choose Database:** Select the existing database and enter the credentials.
17. **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.
18. **Profile Credentials:** Enter the login for an account in the administrator group in Developer. This account must already exist in the Library.
19. **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.

20. **Ready to Install:** The Installation Wizard is ready to install the software. Click Back to review or modify any settings.
21. **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.
22. **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.

2.2 Upgrade the Developer Database Manually

To update the existing Oracle schema for Developer and all the objects, two scripts must be run. One script, `AlterSystemObjects`, requires system administrator privileges. It updates the tablespace, the schema owner and the application user schema that has access to the schema where the Developer objects are created. The second script, `AlterSchemaObjects`, updates the schema objects necessary to run Developer. This script should be run by the schema owner account created from the previous installation of Developer.

If you are using a Microsoft SQL Server, the SQL scripts are intended to be run by an SQL administrator with either `sysadmin` or a combination of `securityadmin` and `dbcreator` privileges. The database objects creation does not necessarily require these privileges and could be performed by the user with `db_owner` privileges of the database. This would require modifications to the SQL scripts.

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

1. From the Windows Start menu, open a Command Prompt window.
2. To update the schema using the **AlterSystemObjects.sql** script located in `\db scripts\ORACLE\Developer\Upgrade` in the software installation files, enter the following at the command prompt:

Standard SQL*Plus syntax:

```
sqlplus -s
<ORACLE_ADMINISTRATOR>/<ORACLE_ADMINISTRATOR_PASSWORD>@<SERVER_INSTANCE>
@"<SCRIPT_LOCATION>\<SCRIPT_NAME>" variable_value1
variable_value2 ... variable_valueN
```

Note: The `-s` parameter runs SQL*Plus without SQL*Plus messaging.

Warning! The values must be in this order to run correctly.

Run the following:

```
sqlplus -s
<ORACLE_ADMINISTRATOR>/<ORACLE_ADMINISTRATOR_PASSWORD>@<SERVER_INSTANCE>
@"AlterSystemObjects.sql" <SCHEMA_OWNER> <SCHEMA_USER>
```

The variables that need to be replaced are:

`<ORACLE_ADMINISTRATOR>` - administrator user login with credentials to create tablespace, user, and so on.

`<ORACLE_ADMINISTRATOR_PASSWORD>` - password for the Oracle administrator

`<SERVER_INSTANCE>` - name of the Oracle server instance where the tablespace and users will be created

<SCHEMA_OWNER> - user to be created that is the schema owner
<SCHEMA_USER> - the application user that is create to have access to the Developer schema

Example with default install parameters:

```
sqlplus -s system/password@xe @"E:\Setup\db  
scripts\ORACLE\Developer\Upgrade\AlterSystemObjects.sql" ODServe ODServe_app
```

3. Confirm the parameters and run the script. After the schema is created, enter **exit** and press **ENTER** to return to the prompt in the Command Prompt window.
4. Next update the schema objects by running the **AlterSchemaObjects.sql** script. The script contains variables that are replaced with the text supplied for the values.

Warning! The values must be in this order to run correctly.

Standard SQL*Plus syntax:

```
sqlplus -s  
<SCHEMA_OWNER>/<SCHEMA_OWNER_PASSWORD>@<SERVER_INSTANCE>  
@"<SCRIPT_LOCATION>\<SCRIPT_NAME>" variable_value1 variable_value2 ...  
variable_valueN
```

Note: The -s parameter runs SQL*Plus without SQL*Plus messaging.

Run the following:

```
sqlplus -s  
<SCHEMA_OWNER>/<SCHEMA_OWNER_PASSWORD>@<SERVER_INSTANCE>  
@"AlterSchemaObjects.sql" <SCHEMA_OWNER> <SCHEMA_USER>
```

The variables that need to be replaced are:

<SCHEMA_OWNER> - user created that is the schema owner
<SCHEMA_OWNER_PASSWORD> - password set for the schema owner
<SERVER_INSTANCE> - name of the Oracle server instance where the tablespace and users are created
<SCHEMA_OWNER> - user created that is the schema owner
<SCHEMA_USER> - the application user that has access to the Developer schema

Example with default install parameters:

```
sqlplus -s ODServe/password@xe @"E:\setup\db  
scripts\ORACLE\Developer\Upgrade\AlterSchemaObjects.sql" ODServe ODServe_app
```

5. Confirm the parameters and run the script. After the script runs, enter **exit** and press **ENTER** to return to the prompt in the Command Prompt window.
6. Enter **exit** and press **ENTER** to exit the Command Prompt window.

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

1. From the Windows Start menu, open a Command Prompt window.
2. Update the database objects by running the AlterDBObjects.sql script. The script contains variables that are replaced with the text supplied for the values.

Warning! All variable names must be referenced for the script to run successfully.

Standard sqlcmd syntax:

```
sqlcmd -E -S <SERVER_NAME> -i <SCRIPTFILE> -v VARIABLE1="<VALUE1>" -v  
VARIABLE2="<VALUE2>"
```

Note: The -E parameter means use an entrusted connection to the SQL Server. To use

a login and password, use -U <LOGINID> and -P <PASSWORD> parameters.

Run the following:

```
sqlcmd -E -S <SERVER_NAME> -i CreateDBObjects.sql -v
DBOwner="<DATABASE_OWNER>" -v DBName="<DATABASE_NAME>"
```

The variables that need to be replaced are:

<SERVER_NAME> - the server instance to connect to

<DATABASE_OWNER> - database user to be created that is the primary owner of the database

<DATABASE_NAME> - the name of the database to be updated

Enter the fully qualified path of the script file.

Example with default install parameters:

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

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

2.3 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.


You must have administrator privileges to the computer or at least have necessary permissions set to upgrade the software.

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.

2.4 Upgrade a Single User Installation

You must have administrator privileges to the computer or at least have necessary permissions set to upgrade the software.

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

 To upgrade from 3.6.1, 11.0, or 11.1:

1. Follow the instructions in the *Installation & Administration* guide for a single user installation, and be sure to install the software in a different location.
2. Launch the 12.1 Developer. When you open your profile, you are 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.

2.5 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\v4.0.30319\aspnet_regiis -pd  
"connectionStrings" -app "<Virtualdirectory>" -site "<siteID or Identifier>"
```

Example using the Default Web Site:

```
C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -pd  
"connectionStrings" -app "/ODSContent" -site "1"
```

Example when using a different Web Site:

```
C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\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="<database name>";`

Example:

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

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.

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

Generic syntax:

```
C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -pe  
"connectionStrings" -app "<Virtualdirectory>" -site "<siteID or Identifier>"
```

Example when using the Default Web Site:

```
C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -pe  
"connectionStrings" -app "/ODSContent" -site "1"
```

Example when using a different Web Site:

```
C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -pe  
"connectionStrings" -app "/ODSContent" -site "4567890"
```

Additional Reference:

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

3 Upgrade Knowledge Center and Usage Tracking

The procedure you use to upgrade to Knowledge Center 12.1 depends on the version and type of installation you are upgrading from:

- Knowledge Center 11.0 or 11.1: You can upgrade directly to 12.1. See *Upgrade Knowledge Center from 11.0 or 11.1* for more information.
- Knowledge Pathways 5.5 or earlier: You cannot upgrade directly to version 12.1. You must upgrade to either the Standard or Professional Edition 11.0 or 11.1 first. Be sure that you have converted all of your titles into Developer as well. You can then upgrade to 12.1. See *Upgrade Usage Tracking and Knowledge Pathways Versions prior to 11.0* in the *Upgrade* guide for either 11.0 or 11.1 for more information.
- Usage Tracking 3.6.1 and no Knowledge Center installed: You can upgrade Usage Tracking version 3.6.1 directly to Knowledge Center 12.1. If you have no version of Knowledge Center installed and are installing, not upgrading, version 12.1, you can use the installer and do both at once. See *Upgrade Usage Tracking and Install Knowledge Center* for more information.
- Usage Tracking 3.6.1 and Knowledge Center 11.0 or 11.1 installed: It is highly recommended that you upgrade Knowledge Center to version 12.1 first. See *Upgrade Knowledge Center from 11.0 or 11.1* for more information. You can then use the Usage Tracking Conversion Utility to upgrade Usage Tracking into Knowledge Center. See *Upgrade Usage Tracking with the Conversion Utility* for more information.

Note: You cannot upgrade the Knowledge Center User Import Utility. You must install the new version.

3.1 Upgrade Knowledge Center from 11.0 or 11.1

To upgrade Knowledge Center from 11.0 or 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: Previous versions of Knowledge Center used Indexing Service. Windows Search and Indexing Service cannot coexist on the same machine, so if an upgrade is being performed (or if Indexing is installed for another reason), Indexing must be uninstalled prior to this installation of Knowledge Center to be able to use Windows Search.

This version of Knowledge Center supports only one content root. The physical location of this content root should reside locally on the Knowledge Center server. There are additional steps for using a remote location. During an upgrade, one of these scenarios can exist, and the installer does the following:

- If there is only one existing local Content Root, the installer uses that location.
- If there are one or more Content Roots, all residing remotely, a local location is configured.
- If there are multiple Content Roots with only one residing locally, the installer gives you the option to use the existing local location or create a new one.
- If there are multiple Content Roots, and there are multiple residing locally, the installer gives you the option to use one of the existing local Content Roots or create a new one.

In all cases, after the upgrade is complete, all existing content is in one single local location.

If you have modified .cus files to customize the user interface of Knowledge Center 11.0 or 11.1, the customizations still work in 12.1. 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.

1. **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).
2. **Welcome:** From this screen, you can access the Installation and Upgrade guides in Adobe Acrobat format.
3. **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
4. **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.
5. **Microsoft .NET Framework Update:** Choose to install Microsoft .NET Framework 4.5. Note that a reboot might be required. This screen only appears if the .NET Framework 4.5 needs to be installed.
6. **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 Windows Search service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality does not function properly. During the installation of Professional Edition, the installer detects the state of the Windows Search 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.

7. **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
8. **Usage Tracking Conversion:** Choose **No, this is a new installation**.
9. **Choose Web Site:** Select the web site and virtual directories that were used in the previous version of the software. If you do not use the same virtual directory names from the previous version, those older virtual directories can no longer access Knowledge Center.

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

10. **Virtual Directory Options:** If you entered the existing virtual directories on the Choose Web Site screen, this screen appears.
11. **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.
12. **URL Settings:** The URL of the web site is determined by the installer and used in the configuration settings of Knowledge Center. However, what the installer determines, and what the actual URL should be may not be the same, so the user can modify it as necessary. All DNS and proxy settings should be considered before changing the value. If no changes are needed, or if the user is unsure of the settings, the URL should be left as it is currently set
13. **Database System:** Choose **Oracle Database**.
14. **Oracle ODBC Components:** The installer requires a 32-bit ODBC driver to be installed to connect to the Oracle Database. If there is no ODBC driver, the installer installs one. This screen does not appear if an ODBC driver already exists. In the **Path** field, enter the physical location to which you want to install the Oracle ODBC components.
15. **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.
16. **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).
17. **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 is associated with the tablespace. If the scripts have been run, this screen does not appear.
18. **Schema Options:** If the scripts have not been run, choose **Update schema**. If the scripts have been run, choose **Use existing schema**.
19. **Application User:** In previous versions of the software, the application user name and password was always based on the schema owner account created. Checking or unchecking the Create Application User Based on These Credentials option in this case does not attempt to create anything new; rather the installer verifies the default account was created previously. If it was not, you are prompted for the application user credentials.
20. **Content Root Information:** This screen appears if more than one content root exists. You can specify the content root location, or, if there are multiple local content roots, you can choose one from the list. You can choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous

name. Individual users scores and tracking data are not available.

21. **Local Content Root:** This screen appears if there are multiple content roots and at least one is local. Choose an existing local content root or create a new one.
22. **Content Root User:** The Content Root folder is accessed by Knowledge Center by a Windows user that copies files and folders, so it needs the credentials of a user with the necessary privileges to perform these tasks. The Windows user can be created by the installer or be an existing user.
23. **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.
24. **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.
25. **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
26. **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
27. **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 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.

1. **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).
2. **Welcome:** From this screen, you can access the Installation and Upgrade guides in Adobe Acrobat format.
3. **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
4. **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.

5. **Microsoft .NET Framework Update:** Choose to install Microsoft .NET Framework 4.5. Note that a reboot might be required. This screen only appears if the .NET Framework 4.5 needs to be installed.
6. **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 Windows Search service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality does not function properly. During the installation of Professional Edition, the installer detects the state of the Windows Search 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.

7. **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
8. **Usage Tracking Conversion:** Choose **No, this is a new installation.**
9. **Choose Web Site:** Select the web site and virtual directories that were used in the previous version of the software. If you do not use the same virtual directory names from the previous version, those older virtual directories can no longer access Knowledge Center.

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

10. **Virtual Directory Options:** If you entered the existing virtual directories on the Choose Web Site screen, this screen appears.
11. **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.
12. **Url Settings:** The URL of the web site is determined by the installer and used in the configuration settings of Knowledge Center. However, what the installer determines, and what the actual URL should be may not be the same, so the user can modify it as necessary. All DNS and proxy settings should be considered before changing the value. If no changes are needed, or if the user is unsure of the settings, the URL should be left as it is currently set
13. **Database System:** Choose **Microsoft SQL Server.**
14. **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.
15. **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.

16. **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.
17. **Database Options:** If the scripts have not been run, choose **Update database**. If the scripts have been run, choose **Use existing database**.
18. **Application User:** In previous versions of the software, the application user name and password was always based on the schema owner account created. Checking or unchecking the Create Application User Based on These Credentials option in this case does not attempt to create anything new; rather the installer verifies the default account was created previously. If it was not, you are prompted for the application user credentials.
19. **Content Root Information:** This screen appears if more than one content root exists. You can specify the content root location, or, if there are multiple local content roots, you can choose one from the list. You can choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous name. Individual users scores and tracking data are not available.
20. **Local Content Root:** This screen appears if there are multiple content roots and at least one is local. Choose an existing local content root or create a new one.
21. **Content Root User:** The Content Root folder is accessed by Knowledge Center by a Windows user that copies files and folders, so it needs the credentials of a user with the necessary privileges to perform these tasks. The Windows user can be created by the installer or be an existing user.
22. **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.
23. **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.
24. **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
25. **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.

26. **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.

3.1.1 Upgrade the Knowledge Center Database Manually

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

To update an existing Oracle schema for Knowledge Center and all the objects, two scripts are run. One script, `AlterSystemObjects`, requires system administrator privileges. It updates the tablespace, the schema owner and the application user schema that has access to the schema where the Knowledge Center objects are created. The second script, `AlterSchemaObjects`, updates the schema objects necessary to run Knowledge Center. This script should be run by the schema owner account created from the previous installation of Knowledge Center.

If you are using a Microsoft SQL Server, the SQL scripts are intended to be run by an SQL administrator with either `sysadmin` or a combination of `securityadmin` and `dbcreator` privileges. The database objects creation does not necessarily require these privileges and could be performed by the user with `db_owner` privileges of the database. This would require modifications to the SQL scripts.

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.
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\Upgrade
```

3. To update the schema using the **AlterSchemaObjects.sql** script, enter the following at the command prompt:

Standard SQL*Plus syntax:

```
sqlplus -s
<ORACLE_ADMINISTRATOR>/<ORACLE_ADMINISTRATOR_PASSWORD>@<SERVER_I
NSTANCE> @"<SCRIPT_LOCATION>\<SCRIPT_NAME>" variable_value1
variable_value2 ... variable_valueN
```

Note: The `-s` parameter runs SQL*Plus without SQL*Plus messaging.

Run the following:

```
sqlplus -s
<ORACLE_ADMINISTRATOR>/<ORACLE_ADMINISTRATOR_PASSWORD>@<SERVER_I
NSTANCE> @"AlterSystemObjects.sql" <SCHEMA_OWNER> <SCHEMA_USER>
```

The variables that need to be replaced are:

<ORACLE_ADMINISTRATOR> - administrator user login with credentials to create tablespace, user, and so on.
 <ORACLE_ADMINISTRATOR_PASSWORD> - password for the Oracle administrator
 <SERVER_INSTANCE> - name of the Oracle server instance where the tablespace and users will be created
 <SCHEMA_OWNER> - user to be created that is the schema owner
 <SCHEMA_USER> - the application user that is create to have access to the Developer

schema

Example with default install parameters:

```
sqlplus -s system/password@xe @CreateSystemObjects.sql KServer KServer_app
```

4. Confirm the parameters and run the script. After the schema is created, enter **exit** and press **ENTER** to return to the prompt in the Command Prompt window.
5. Next update the schema objects by running the **AlterSchemaObjects.sql** script. The script contains variables that are replaced with the text supplied for the values.

Warning! The values must be in this order to run correctly.

Standard SQL*Plus syntax:

```
sqlplus -s
<SCHEMA_OWNER>/<SCHEMA_OWNER_PASSWORD>@<SERVER_INSTANCE>
@"<SCRIPT_LOCATION>\<SCRIPT_NAME>" variable_value1 variable_value2 ...
variable_valueN
```

Note: The -s parameter runs SQL*Plus without SQL*Plus messaging.

Run the following:

```
sqlplus -s
<SCHEMA_OWNER>/<SCHEMA_OWNER_PASSWORD>@<SERVER_INSTANCE>
@"AlterSchemaObjects.sql" <SCHEMA_OWNER> <SCHEMA_USER>
```

The variables that need to be replaced are:

<SCHEMA_OWNER> - user created that is the schema owner
 <SCHEMA_OWNER_PASSWORD> - password set for the schema owner
 <SERVER_INSTANCE> - name of the Oracle server instance where the tablespace and users are created
 <SCHEMA_OWNER> - user created that is the schema owner
 <SCHEMA_USER> - the application user that has access to the Developer schema

Example with default install parameters:

```
sqlplus -s KServer/password@xe @"CreateSchemaObjects.sql" KServer KServer_app
```

6. Confirm the parameters and run the script. After the script runs, enter **exit** and press **ENTER** to return to the prompt in the Command Prompt window.
7. Enter **exit** and press **ENTER** to exit the Command Prompt window.

 To upgrade the Microsoft SQL Server database manually before you 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. The script contains variables that are replaced with the text supplied for the values.

Warning! All variable names must be referenced for the script to run successfully.

Standard sqlcmd syntax:

```
sqlcmd -E -S <SERVER_NAME> -i <SCRIPTFILE> -v VARIABLE1="<VALUE1>" -v
VARIABLE2="<VALUE2>"
```


Note: The -E parameter means use an entrusted connection to the SQL Server. To use a login and password, use -U <LOGINID> and -P <PASSWORD> parameters.

Run the following:

```
sqlcmd -E -S <SERVER_NAME> -i AlterDBObjects.sql -v
DBName="<DATABASE_NAME>"
```

The variables that need to be replaced are:

<SERVER_NAME> - the server instance to connect to

<DATABASE_NAME> - the name of the database to be created that contains the tables, procedures, etc.

Example with default install parameters:

```
sqlcmd -E -S "sqlserver" -i "AlterDBObjects.sql" -v DBName="KMaster"
```

4. Confirm the parameters and run the script.
5. Enter **exit** and press **ENTER** to exit the Command Prompt window.

3.2 Upgrade Usage Tracking and Install Knowledge Center

If you want to upgrade Usage Tracking from 3.6.1 and install Knowledge Center 12.1 at the same time, you can use the installer. 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* guide 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 must 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 guide for more information.

To upgrade Usage Tracking and install Knowledge Center 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.

1. **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).

2. **Welcome:** From this screen, you can access the Installation and Upgrade guides in Adobe Acrobat format.
3. **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
4. **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 Windows Search service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality does not function properly. During the installation of Professional Edition, the installer detects the state of the Windows Search 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.

5. **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
6. **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.
7. **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.

8. **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.
9. **URL Settings:** The URL of the web site is determined by the installer and used in the configuration settings of Knowledge Center. However, what the installer determines, and what the actual URL should be may not be the same, so the user can modify it as necessary. All DNS and proxy settings should be considered before changing the value. If no changes are needed, or if the user is unsure of the settings, the URL should be left as it is currently set.
10. **Database System:** Choose **Oracle Database**.

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

11. **Oracle ODBC Components:** The installer requires a 32-bit ODBC driver to be installed to connect to the Oracle Database. If there is no ODBC driver, the installer

installs one. This screen does not appear if an ODBC driver already exists. In the **Path** field, enter the physical location to which you want to install the Oracle ODBC components.

12. **SQL Script Options:** The database scripts can be run manually or through the installer. It is also possible to create a schema outside of the installer using administrative privileges, but let the installer create the schema objects with a previously created schema user that has less privileges. 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.

Note: If a Knowledge Center has already been installed, for example in a server farm or load balanced environment, the existing up-to-date database should be used.

13. **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. The account entered in the **User Name** field must have DBA role privileges to connect to the Oracle Database; the role is required to create or update the tablespace, schema owner, and schema user created for the application.

If the scripts have already been run to create the database, enter the user name, password and host string that has access to the user schema created to run the application. The account in the **User Name** field must be the name of the application user associated with the schema you created manually with the scripts. 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).

14. **Choose Schema:** Specify a tablespace name, user name, and password and confirm the password. The user name is limited to 20 characters. The tablespace name is the name of the tablespace that is created or used during the installation; the user name is the user name that will be created or associated with the schema. This user name and password are also used for the Oracle application user that is created automatically. This user is for the application to read and write information to the database. If you want to specify a different Oracle application user, deselect the **Create Application User Based on These Credentials** option. The Application User screen appears next.

If the Create Application User Based on These Credentials is selected, the application user created based on the entered credentials is the same Login ID with "_app" appended to the end, and it uses the same password. The Content Root Information screen appears next.

15. **Application User:** Specify a user name and password and confirm the password. This screen only appears if you deselected the Create Application User Based on These Credentials option on the previous screen.
16. **Content Root Information:** The content root location is the physical location (path and folder name) for the content root. You can enter it in the field or click **Browse** to navigate to the location. You can choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous name. Individual users scores and tracking data will not be available.
17. **Content Root User:** The Content Root folder is accessed by Knowledge Center by a Windows user that copies files and folders, so it needs the credentials of a user with

the necessary privileges to perform these tasks. The Windows user can be created by the installer, or be an existing user.

18. **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.
19. **Folder permission:** The Knowledge Center needs certain permissions to complete the 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.
20. **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
21. **Setup Status:** This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.
22. **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. Click the URL to open Knowledge Center in your default browser.

To upgrade Usage Tracking and install Knowledge Center using 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.

1. **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).
2. **Welcome:** From this screen, you can access the Installation and Upgrade guides in Adobe Acrobat format.
3. **Setup Type:** From the **Configuration** list, select **Knowledge Center**.
4. **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 Windows Search service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality does not function properly. During the installation of Professional Edition, the installer detects the state of the Windows Search 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.

5. **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one.
6. **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.
7. **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.
8. **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.
9. **URL Settings:** The URL of the web site is determined by the installer and used in the configuration settings of Knowledge Center. However, what the installer determines, and what the actual URL should be may not be the same, so the user can modify it as necessary. All DNS and proxy settings should be considered before changing the value. If no changes are needed, or if the user is unsure of the settings, the URL should be left as it is currently set.
10. **Database System:** Choose **Microsoft SQL Server**.

Note: The web server and the database server must be in the same local network.
11. **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.
12. **Microsoft SQL Server Login:** 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.
13. **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.

14. **Content Root Information:** The content root location is the physical location (path and folder name) for the content root. You can enter it in the field or click **Browse** to navigate to the location. You can choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous name. Individual users scores and tracking data will not be available.
15. **Content Root User:** The Content Root folder is accessed by Knowledge Center by a Windows user that copies files and folders, so it needs the credentials of a user with the necessary privileges to perform these tasks. The Windows user can be created by the installer, or be an existing user.
16. **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.
17. **Folder permission:** The Knowledge Center needs certain permissions to complete the 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.
18. **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
19. **Setup Status:** This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.
20. **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. Click the URL to open Knowledge Center in your default browser.

3.3 Upgrade Usage Tracking with the Conversion Utility

Use this conversion utility if you have already used the installer to upgrade Knowledge Center to 12.1 and now need to convert the data from a Usage Tracking 3.6.1 installation.

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* guide 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 must 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 guide 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 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**.

