Planon Reconfiguration

Planon Software Suite

Version: L129

Planon
Building Connections

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

Table of Contents

Introduction

Purpose of this document

This document aims to provide a step-by-step guide to the pre and post database ‘refresh’ configuration changes required to get a Planon environment operational again.

The steps described in this document should be carried out in the order as written.

Before you start

It is recommended that this document is reviewed fully prior to undertaking a database refresh.

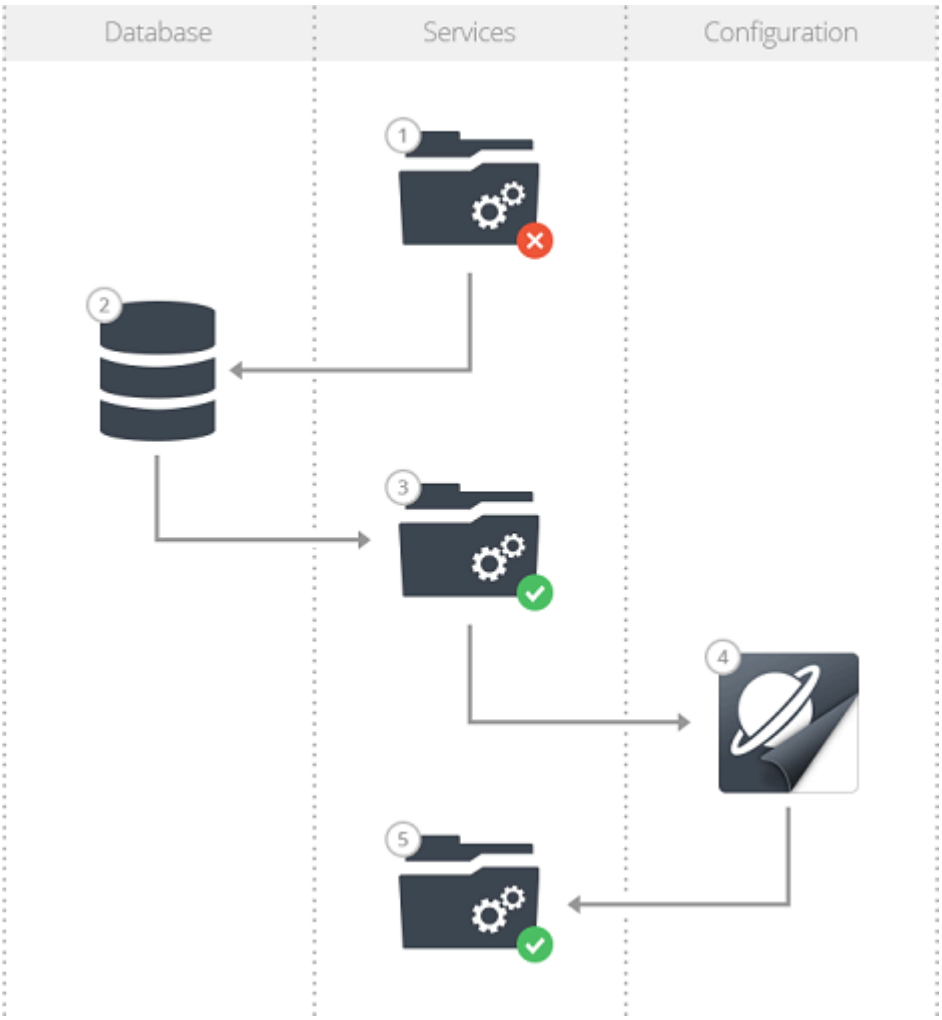
All settings that need to be configured after the refresh can in fact be obtained and verified before the refresh is undertaken.

The appendix contains a checklist of values required to complete the configuration described in this document.

For later reference, fill out the List of values at the end of this document before carrying out a database refresh.

Process overview

The following picture and table illustrate the steps to be taken in the process of getting a Planon environment operational following a database refresh.



Step	Description	Reference
1.	Disable customizations* Stop the services / application pools	Tailor made solutions (TMS) / Interfaces
2.	Import database and configure the database connection	Database configuration
3.	Start the services	Post database import configuration
4.	Configure in Planon	Configure Planon Help
5.	Enable customizations*	Start TMS / Interfaces

* Optional step(s)

Environment setup

Make sure the environment is installed with the following configuration.

DTAP environment

DTAP stands for **D**evelopment, **T**est, **A**cceptance and **P**roduction environment. Planon offers the possibility to mark your installation even if it is not your production installation. This will be visualized in the GUI.

In the application server service configuration file located in ...\Server\tanuki\appserver \conf, add the following parameters.

wrapper.java.additional.***nr***=-Dcom.planonsoftware.notproductionmode=true

wrapper.java.additional.***nr***=-Dcom.planonsoftware.notproductionmode.description="Test Environment"

notproductionmode:

- True: The installation is marked as not production. In this case the GUI will display an identifying text
- False or not available: The installation is marked as production. No identification
- This information can also be retrieved from the SDK

notproductionmode.description:

- The text that will be displayed in the GUI
- Will only be applicable if the notproductionmode=true
- If empty, no text will be shown and only a red box will be displayed



By default, Scheduled tasks, Platform apps and user extensions are disabled on first restart of DTA (Development, Test and Acceptance) environments. With next restarts, they will remain activated.

Restoring an environment

What happens when restoring an environment?

1. Typically, when you restore a Production environment to D, T, or A, all scheduled events are disabled:
   - Platform apps
   - TMS
   - Scheduled tasks

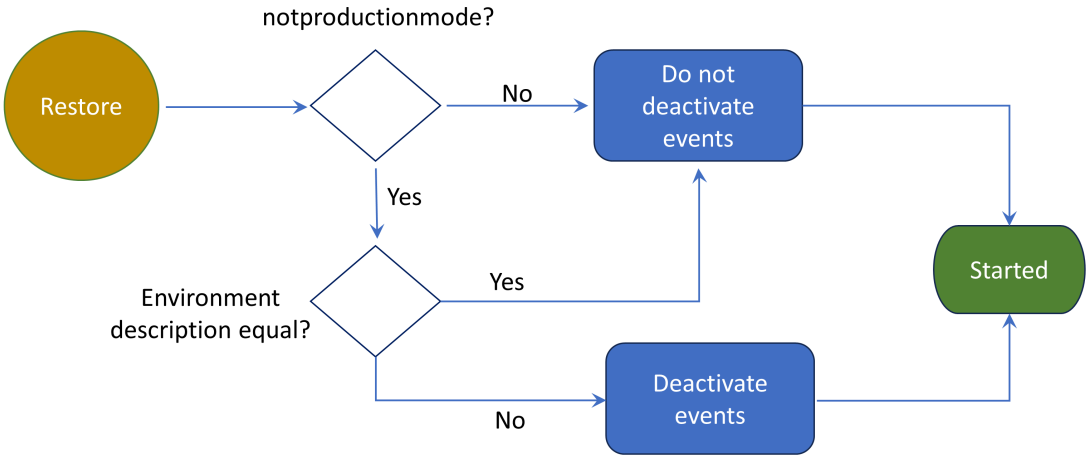
   Disabling these events is done to ensure that Production data is not compromised. However, a second verification takes place.
2. When restoring an environment in D, T, or A, the Environment description is verified.
   - If the Environment mode is *not production* and if the Environment description is *equal*, the events are not deactivated.

     This implies that for the sake of convenience, these events persist and remain functional even after actions such as restarting, rebuilding, restoring, or upgrading the system.

When restoring an environment with the same environment mode from another URL (environment name differs), the apps are set to *Inactive*.

- If the Environment mode is *not production* and if the Environment description is *not equal*, the events are deactivated.

  Graphically, this is illustrated as follows:



  In a table, this is illustrated as follows:

Backup to Production	No	Equal	No
Backup to Production	No	No equal	No
Backup to DTA	Yes	Equal	No
Backup to DTA	Yes	Not equal	**Yes**

WildFly cluster

On-premise customers who have installed a WildFly cluster must ensure that the *JGROUPSPING* table is emptied when a database is copied from one environment to another. This needs to be done - for example - to prevent the ACC environment connecting to the Prod environment.

For Cloud, this is done automatically when restoring Production to ACC, TEST or DEV, or ACC to TEST etc.

Routing mails to Log viewer

In Production mode, (notification) mails are sent to the intended recipients. When moving an environment to another mode, and DTAP is configured as described here, mails will be routed to the **Log viewer**. For more information, see Log viewer.

Process

1. If DTAP is configured as described in DTAP environment, then this is visually displayed in the user interface by the **Email catcher on?** radio button in System Settings > Email settings. If this read-only field is set to **No**, this implies that the mode is Production.
2. If the Planon environment is moved from Production mode to another DTAP mode, this change is detected and the **Email catcher on?** setting is changed to **Yes**.
3. Emails that are typically sent to a recipient, will not be sent but will be routed to the **Log viewer**.
4. You can test the email mechanism from the **Log viewer** by selecting a mail log entry and clicking **Resend event log email** (BomResendEventLogEmail). The CC and BCC recipients will be cleared on sending the email. The BOM is only enabled when selecting a mail log entry.
5. After moving the environment back to Production, the **Email catcher on?** will be set to **No** and the mail exchange will be continued.

For Cloud environments this behavior is default. For on-premise installations, this will need to be configured.

Pre database import configuration

Tailor made solutions (TMS) / Interfaces

If the customer's Planon environment includes any scheduled interfaces these should be switched off first.

> For later reference, make a screenshot of the scheduled tasks / services that you will terminate.

The two most common methods for interface scheduling are:

Windows scheduled tasks

To stop any Windows scheduled tasks associated with Planon:

Windows 2008 server

1. Start Server Manager.
2. Drill down to Configuration > Task Scheduler Library.
3. Select the relevant scheduled task.
4. Click Disable in the panel on the right.

Windows 2012 server

1. Start the Server Manager.
2. In the menu, select Tools click Task Scheduler.
3. Click Task Scheduler Library.
4. Select the relevant scheduled task.
5. Click Disable in the panel on the right.

Windows 2016 server

Stopping services

Before carrying out the database import it is necessary to stop the services associated with your Planon environment. For the majority of Planon installations the application server and web server services reside on the same server. However, some larger environments utilize a dedicated application server and a separate dedicated web server.

Stopping web server service

1. Log on to the server running the web server.
2. Click Start > All Programs > Administrative Tools > Services or Press Windows key + R on the keyboard to run *services.msc*
3. Select the web server service.

> The default service name is ***PlanonWebServer_[…]***. If multiple web server instances exist on the server then the text represented as […] will be replaced with the respective environment name e.g. Live, Test, PreProd, Dev etc.

4. Right-click on the Service and from the drop-down menu select Stop.

Stopping the application server service

1. Log on to the server running the application server.
2. Click Start > All Programs> Administrative Tools > Services.
3. or Press Windows key + R on the keyboard to run *services.msc*
4. Select the application server service.

   The default service name is ***PlanonApplicationServer_[...]***.
   If multiple application server instances exist on the server then the text represented as […] will be replaced with the respective environment name e.g. Live, Test, PreProd, Dev etc.

5. Right-click on the Service and from the drop-down menu and select Stop.

Database configuration

MSSQL Server

Permissions

Suite Database Upgrade tool

The Suite Database Upgrade tool must have following SQL database rights. Also take care of sufficient quota on the default table space of the upgrade user.

use master,

create login ***LoginName*** with password='Plan$QL', default_database=***DatabaseName***;

Go

use [***DatabaseName***];

Create User ***UserName*** FROM LOGIN ***LoginName***

exec sp_addrolemember 'db_owner', '***UserName*** ';

Go

Planon application

The Planon application user must have the following SQL database rights. Also take care of sufficient quota on the default table space of the Planon application user.

use master

create login ***LoginName*** with password='Plan$QL', default_database=***DatabaseName***

Go

use master;

Grant View Server State To ***LoginName***;

Go

use [***DatabaseName***];

Create user ***UserName*** for login ***LoginName***;

Go

use [***DatabaseName***];

GRANT CONNECT TO ***UserName***

Go

use [***DatabaseName***];

GRANT SELECT,INSERT,UPDATE,DELETE TO ***UserName***;

Go

use [***DatabaseName***];

GRANT EXECUTE TO ***UserName***;

Go

Import

When using an MSSQL Server, carry out the following tasks after importing the .bak data file.

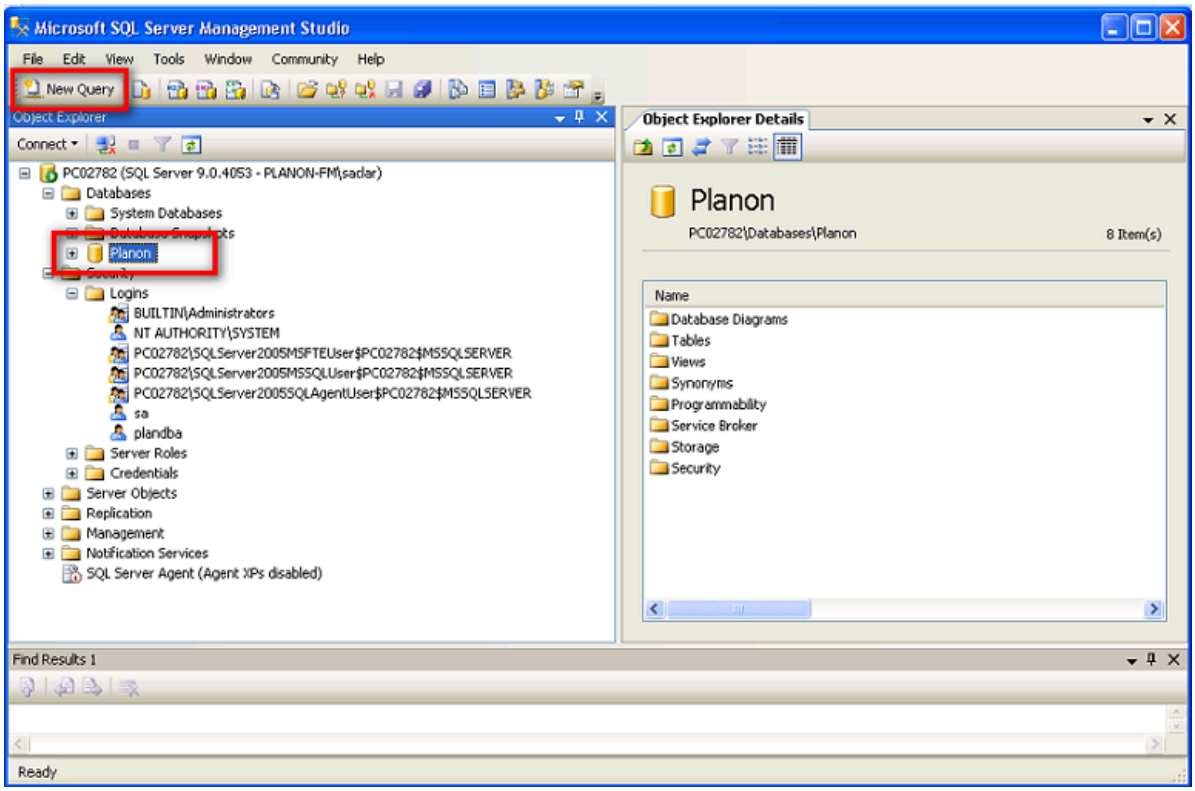
- Setting db user ‘plandba’ as dbo
- Setting the default database for user ‘plandba

Setting db user ‘plandba’ as dbo
Setting the default database for user ‘plandba’

Setting db user ‘plandba’ as dbo

The user ‘plandba’ is given database administrator privileges by assigning the ‘dbo’ privilege. For more information, see Setting the default database for user ‘plandba’

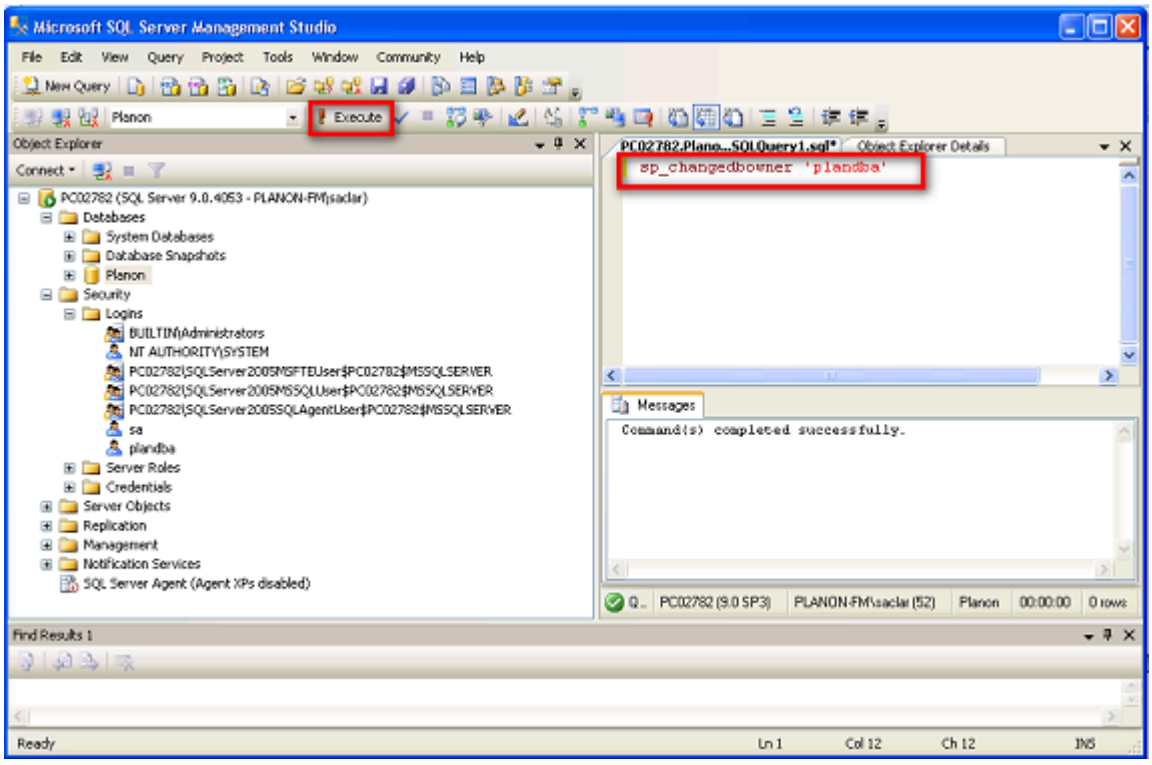
1. Open MSSQL Management Studio.
2. Select the ‘Planon’ database.
3. On the toolbar, click New Query.



4. Run this stored procedure.

```
sp_changedbowner ‘plandba’
```

Do not forget to carry out this step, as you will not be able to access the database when this step is overlooked.

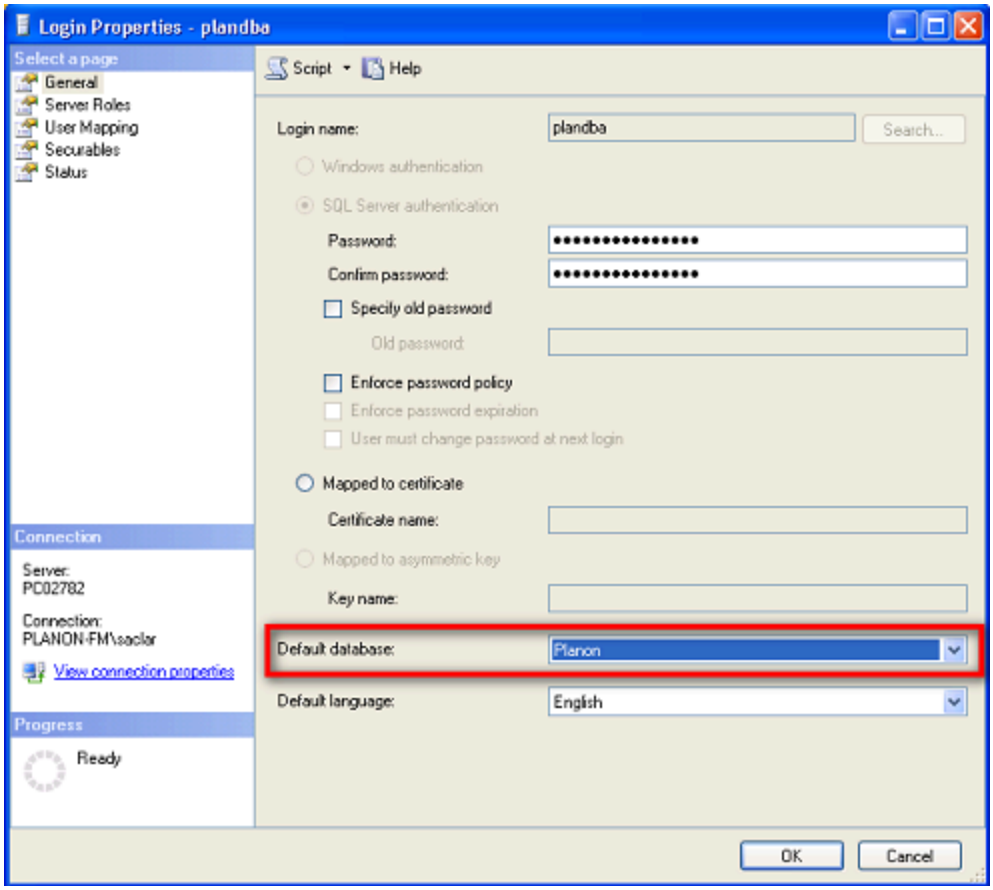

Microsoft SQL Server Management Studio
File Edit View Query Project Tools Window Community Help
New Query
Planon
Execute
Object Explorer
Connect
PC02782 (SQL Server 9.0.4053 - PLANON-FM\saclar)
Databases
System Databases
Database Snapshots
Planon
Security
Logins
BUILTIN\Administrators
NT AUTHORITY\SYSTEM
PC02782\SQLServer2005MSFTEUser$PC02782$MSSQLSERVER
PC02782\SQLServer2005MSSQLUser$PC02782$MSSQLSERVER
PC02782\SQLServer2005SQLAgentUser$PC02782$MSSQLSERVER
sa
plandba
Server Roles
Credentials
Server Objects
Replication
Management
Notification Services
SQL Server Agent (Agent XPs disabled)
PC02782.Plano...SQLQuery1.sql*
Object Explorer Details
sp_changedbowner 'plandba'
Messages
Command(s) completed successfully.
PC02782 (9.0 SP3)
PLANON-FM\saclar (52)
Planon
00:00:00
0 rows
Find Results 1
Ready
Ln 1
Col 12
Ch 12
INS

Setting the default database for user ‘plandba’

The used connection strings do not always specify the desired database to connect to. It is therefore necessary to designate the Planon database as the default database for user ‘plandba’.

Procedure

1. Open MSSQL Management Studio.
2. Under Security> Loginsselect user plandba.
3. Right-click on user plandba and select Properties from the list.
4. Set the Default database to Planon.
5. Click OK to save and exit.



Deadlock prevention

Used with default settings on MSSQL highly concurrent Planon sessions can lead to deadlocks. Planon recommends changing some settings on database level in order to decrease the chances of a deadlock situation. Apply the following statements to achieve the READ_COMMITTED_SNAPSHOT level of isolation:

ALTER DATABASE <DB Name> SET SINGLE_USER WITH ROLLBACK IMMEDIATE;

ALTER DATABASE <DB Name> SET READ_COMMITTED_SNAPSHOT ON;

ALTER DATABASE <DB Name> SET MULTI_USER;

Replace <DB Name> by the database name.

These statements should be executed by a DBA only.

If these settings are not configured, the following warning will be logged in the serverboot.log file when starting the applicaiton server:

WARN [SystemBODefinitionCache] database property

READ_COMMITTED_SNAPSHOT is not ON! change your DB configuration!

Case and accent insensitive search

The collation of the database defines if the search is case and accent insensitive or not. Install the database with the correct collation, to have the behavior you want.

Oracle server

Minimal required permissions

Suite Database Upgrade tool

The Suite Database Upgrade tool must have following Oracle database rights. Also take care of sufficient quota on the default table space of the upgrade user.

GRANT ALTER SESSION TO <<username>>

GRANT CREATE PROCEDURE TO <<username>>

GRANT CREATE SESSION TO <<username>>

GRANT CREATE TABLE TO <<username>>

GRANT CREATE TRIGGER TO <<username>>

GRANT CREATE VIEW TO <<username>>

GRANT QUERY REWRITE TO <<username>>

GRANT CREATE SEQUENCE TO <<username>>

Planon application

The Planon application user must have the following Oracle database rights. Also take care of sufficient quota on the default table space of the Planon application user.

Grant Create Session to <<username>>

Grant Alter Session to <<username>>

GPS field type support

To support fields of the type SDO_GEOMETRY, Oracle locator should be installed on the Oracle server.

For a description on how to verify whether Oracle Locator (and only Oracle locater, not Spatial) is installed, refer to the Oracle Support documentation (Doc ID 357943.1).

Known issue in Oracle with GPS fields

During data pump imports of databases containing GPS data in columns with type SDO_GEOMETRY, the following error may occur:

"ORA-39779: type "MDSYS"."SDO_GEOMETRY" not found or conversion to latest version is not possible"

Solution

1. Log on as sysdba and run $ORACLE_HOME/md/admin/sdoupggeom.sql on the destination database also to increase the size of the Ordinate Array definition.
2. Then perform the import again.

For more information, see the Oracle Support documentation (Doc ID 1584858.1).

Case and accent insensitive search

Oracle is always case and accent sensitive.

Post database import configuration

Start the application server service

1. Log on to the server running the application server.
2. Click Start > All Programs > Administrative Tools > Services.
3. or Press Windows key + R on the keyboard to run ***services.msc***
4. Select and right-click the application server service
5. From the drop-down menu select Start.

Check the application server service

1. While still logged in to Planon application server browse to the following location:

   ...\Server\wildfly-*\standalone\log

2. Open the file named 'Server.log'.

Check whether the "Expected" and the "Actual" Planon versions match. You can find this information in the server.log file, by looking for the word *Expected*.

```
Software buildnumber of installed application: 38.0.0.2-1

Software buildnumber recorded in database: 38.0.0.0-121
```

Check for this line:

Determined runmode NORMAL_MODE, reason: Database is up to date.

- In most customer environments, the application server service takes approximately two minutes to start.
- In some environments, notably where virus checking software is enabled, the application server service can take as long as ten minutes to start.

Start the web server service

1. Click Start > All Programs > Administrative Tools > Services.

   or press **Windows key + R** on the keyboard to run *services.msc*

2. Select the web server service.
3. Right-click the service and from the drop-down menu select Start.

The web server service will take several minutes to start.

4. Start the *Planon ProCenter Web Client* using the usual shortcut.
5. Log in with the system administration account to verify that the Web Client is working correctly.

The Web Client is now ready for use with the system administration login account.

Update file locations

The file locations currently stored in the database will be pointing to the production file share. These should be updated to point to the file share locations for test. These settings should be updated in **System Settings > File locations**.

Check also the WebDAV file settings. If you have secure WebDAV you probably need to update them too.

If you use Mobile Apps also check your icon location in **Apps > Mobile Settings**.

To ensure you have the correct templates, copy the templates from the PROD environment to the TST/ACC environment.

Enterprise Talk

Ensure that any references to import/export data files or folders are correct.

URLs

Ensure that any URLs configured in your launch Center are amended.

Update Connect for Outlook settings

The Connect for Outlook settings currently stored in the database will be pointing to the production Exchange server. May be you have a test server and need to update the settings. These settings should be updated in **System Settings > Exchange**:

1. Update the Notification URL to point to your test Tomcat.
2. Update Server URL and Autodiscover URL to point to your Exchange test environment.
3. We advise you to use different accounts for room access so as to prevent the test environment accessing production mailboxes. If so update the user name Exchange account.

4. Also update the SMTP Server address in System settings > Email to point to this test server.
5. Make sure your test mailbox has an active subscription.

Change the property set name

Optionally, you can change the property set name to clearly differentiate the environments you are using.

1. Start *Planon ProCenter* and log on as Supervisor.
2. Go to Supporting Data > Property sets.
3. Select the current property set and change the description to reflect the type of environment e.g. PROD, ACC, TEST, UAT.
4. Save the changes.

The changes will be reflected once you log off and log on again.

Differentiating between environments

Change the sender e-mail name

This step is done if an e-mail should be sent from the TST/ACC environment.

By changing the Sender name it becomes easier to identify an inadvertently sent e-mail.

1. Go to **System Settings > E-mail settings**.
2. Change the name of the Name of sender to “Customer ACC”.
3. Save the changes.

Change the color scheme

To further differentiate between PROD and TST/ACC environments, it may be useful to change the color scheme.

Editing CSS styling

It is possible to edit the default CSS styling and specify custom styling.

Procedure

1. Click Select sites button on the top right of the application, below the Header.
2. Select Edit sites.

   The Sites dialog box opens.

3. Select the site for which you want to customize the CSS styling.
4. In the CSS field, edit the CSS for the site and all its definitions.
5. Click Save. Reload the web page to view the changes.

Only valid CSS, compliant with W3C standards should be applied.
CSS class names should all be lowercase.

Using system images in CSS

It is possible to use system images in the CSS to customize a Self-Service form.

Procedure

1. In Web configuration, click the Select site... button at the top right of your screen.
2. Select **Edit sites**.
3. Select the site where you want to use the system image.
4. In the site's **CSS** field, edit the CSS by using the system image's **Relative URL**.

Example: `.anyclassname { background-image: url("/systemimages/image1"); }`

For more information on how to create a relative URL, refer to Uploading system images.

5. Click **Save**.

Refresh the web page to view the changes.

Specifying custom styling

The following example describes how you can apply your custom style to the **Description** field of a service request.

1. In the list, select the site for which you want to customize the CSS styling.
2. In the data section, in the CSS box, specify your custom CSS for the site and all its definitions.

The following table provides an example of using custom CSS and its result in the browser.

The default CSS is defined in pss.css, the default style sheet delivered with .

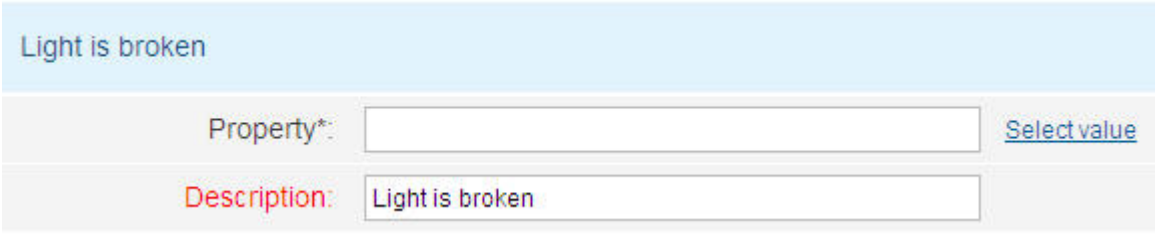
Default CSS

```
.pss_field div.pss_field_label
{
 display: inline-block;
  width: 165px;
  margin-right: 15px;
  text-align: right;
  font-size: 14px;
  color: #404040;
  float: left;
}
```

Custom CSS	Result
`.pss_field_label { color: red; }`	Default CSS will be used because the custom CSS is lacking “importanc
`.pss_field_label { color: red !important }`	Custom CSS will be used. **All** fields with the .pss_field_label class will b in red.
`.pss_custom div.pss_field_label { color: red; }`	Custom CSS will be used, only the field **Description** will be styled in red

3. Go to Web definitions level and select the web definition (in this example: service request).
4. Expand the node and select the Add page.
5. In the data section, select the Description field.
6. In the CSS classes field, type *pss_custom*.

7. Click Save to apply your changes.
8. In the browser, reload the web page. The styling will only be applied to the specific element.



The **Description** field displays in red.

Uploading system images

Prerequisite

To enable users to upload system images, you must first specify the upload location in System Settings > File locations > System images > .

A system image is a file type that requires storage in a secure file location, because it may hold a security risk when it is uploaded. For example, SVG images that can contain JavaScipt (JS). For security reasons, system images must have their own subfolder in the WebDAV location.

Procedure

1. Go to the Supporting data > System images TSI.
2. On the action panel, click Add .
3. In the Image field, click on the Select a file icon to select an image from the server. To upload a new image, click on the Upload icon. You can also drag and drop an image from your local machine in the **Upload** block or click to remove it.

You can only drag and drop one image at a time and only from your local machine. Only .jpg, .jpeg, .gif, .png and .svg (cannot be dragged and dropped) image formats are supported.

By default, the uploaded image is saved in the */systemimages/* folder in the **System images** path.

4. In the User-defined system name field, enter a name for the system image.

   In the Relative URL field, the uploaded image's name is appended to the predefined URL, for example: */systemimages/image1*. This relative URL is bookmarkable and can be used in the Site CSS.

5. Click Save.

The system image can be used in any customized PSS form, in both help texts and CSS. It can also be used in the Web Configuration > Web Content module and in mail merge templates. For more information on applying system images in CSS, see Using system images in CSS.

Configure Planon Help

1. Open System Settings > General and select the entry General.

   Select **Help URL** field.

2. Enter the Planon Help URL. Replace with the URL to your web server: http://[server]:[port]/PlanonHelp_XXX/ or https://[server]:[port]/PlanonHelp_XXX/

The word PlanonHelp is case-sensitive and also make a note of the existing port number before you carry out database refresh.

3. Click Save.
4. Press F9 to carry out PPJC cache refresh and test the URL by clicking the Help button on the PPJC toolbar.

Configure CAD Workbench server

1. Open System Settings > General and select the entry General.

   Select **CAD Workbench > Server location for CAD Workbench** field.

2. Enter the CAD Workbench location. This is typically of the form:

http(s)://<Server name> : <Port>/ cadworkbench-remoting

3. Click Save.

Configure Planon Self-Service

1. Open TSI PSS Manager. Update your site settings, go to the site definitions, and, per site, adopt:
2. The Site URL (Production) to match the correct URL (Acceptance).
3. The Redirect URL (Production) to match the correct URL (Acceptance).
4. Save and close.
5. If you have web definition actions that deviate from the Redirect URL from the site you need to update them too. For example the close action on service request.
6. You can now test your definitions.

Start TMS / Interfaces

Restart any scheduled tasks and/or Planon Talk services that were stopped or disabled in Tailor made solutions (TMS) / Interfaces.

List of values

Fill out the following list of values before carrying out a database refresh.

Parameter	Section	Value
Web server service name	Stopping web server service	
Application server service name	Stopping the application server service	
Planon Self-Service application pool (IIS)	Stopping services	
Windows scheduled tasks (note which are enabled and which are disabled)	Windows scheduled tasks	
Database login account (e.g. plandba)	Setting db user ‘plandba’ as dbo	
JBoss server.log path	Check the application server service	
Planon Help URL	Configure Planon Help	

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