Suite Database Upgrade

Planon Software Suite

Version: L105

Planon
Building Connections

© 1997 - 2024 Planon. All rights reserved.
Planon and the Planon logo are registered trademarks of Planon Software Development B.V. or its affiliates. All other product and company names mentioned herein are trademarks or registered trademarks of their respective companies. Planon Software Development B.V., its affiliates and/or licensors own the copyright to all Planon software and its associated data files and user manuals.

Although every effort has been made to ensure this document and the Planon software are accurate, complete and up to date at the time of writing, Planon Software Development B.V. does not accept liability for the consequences of any misinterpretations, errors or omissions.

A customer is authorized to use the Planon software and its associated data files and user manuals within the terms and conditions of the license agreement between customer and the respective legal Planon entity as soon as the respective Planon entity has received due payment for the software license.

Planon Software Development B.V. strictly prohibits the copying of its software, data files, user manuals and training material. However, customers are authorized to make a back-up copy of the original CD-ROMs supplied, which can then be used in the event of data loss or corruption.

No part of this document may be reproduced in any form for any purpose (including photocopying, copying onto microfilm, or storing in any medium by electronic means) without the prior written permission of Planon Software Development B.V. No copies of this document may be published, distributed, or made available to third parties, whether by paper, electronic or other means without Planon Software Development B.V.'s prior written permission.

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

Suite Database Upgrade..... 5
Minimum Requirements..... 5
Upgrading the database..... 6
Retrieving the Suite DB Upgrade Tool..... 6
DBA System Configuration Tool..... 6
Running the Suite Database Upgrade Tool..... 8
Upgrade Tool Messages..... 13
Index..... 15

Suite Database Upgrade

For a Planon software update, the existing database will need to be upgraded. For ease of use, a single tool, the *Suite Database Upgrade tool,* is made available to perform the required upgrade steps.

The Suite Database Upgrade tool performs the database upgrade for all the tools that are part of the *Planon ProCenter* suite.

Additionally, the tool can also upgrade the additional bundles which have metadata for example TMS system reports specifically built for you as customer.

When upgrading your Release, make sure that you upgrade to a Release that is delivered later (in time) than the current release that you have.

The *Suite Database Upgrade tool* is a release-dependent tool that upgrades older Planon databases to the current version for which the tool itself is valid. The tool ' s version number is specified in the title bar.

A new *Suite Database Upgrade tool* version is delivered with each suite release .

Minimum Requirements

Free disk space of

- 1.1 GB to install the SDUT
- 2.5 GB to run the SDUT

- The *Suite Database Upgrade tool* should be ideally extracted to a root drive or to a folder at root level. If the tool is extracted in a 'deeply buried' sub folder, it causes an error on extraction. (The file paths in this tool are too long for Windows OS).
- If all business objects, TSIs and layouts are not set to **Completed**, the upgrade tool will try to do this for you. However, if the configuration is not complete the upgrade will fail on this. So, we advise you to complete the configuration before the upgrade.

Upgrading the database

The tools described in this document can be retrieved by using the Installation tool (to be retrieved from the customer download site or installation DVD).

Retrieving the Suite DB Upgrade Tool

1. Start the installer, click Next.

   Select the location to install the Suite DB upgrade tool and click Next.

2. Select the Suite DB Upgrade tool option, click Next.
3. Click Start, the tool will be installed in the selected location.

The tool will only be placed in the destination location, it will not be executed.

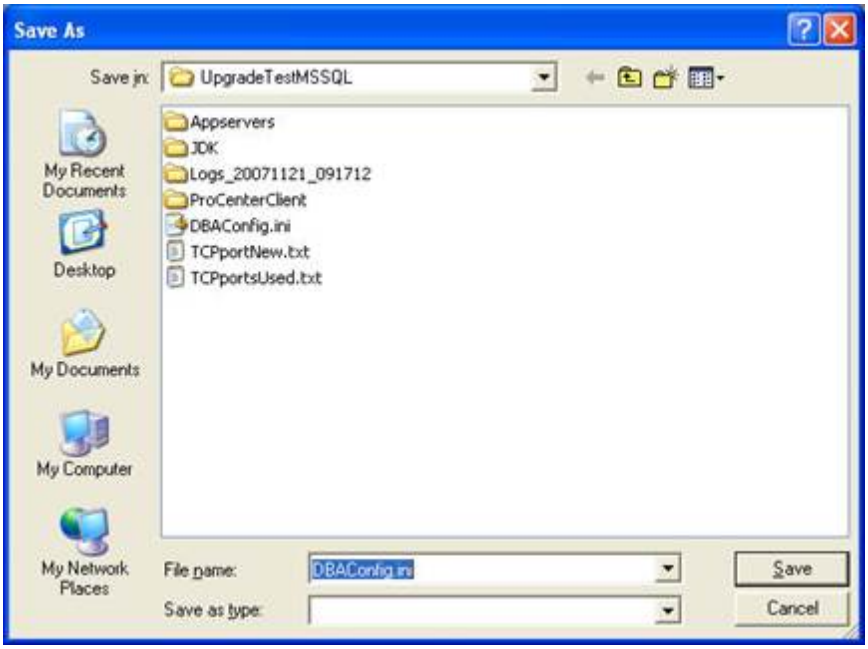
For more information on running the upgrade tool, see Running the suite database upgrade tool.

Before running the *Suite Database Upgrade tool*, you must run the *DBA System Configuration* tool, for an easy upgrade.

DBA System Configuration Tool

DBA System Configuration tool allows the Planon Application Manager to create a *DBAConfig.ini* file containing an encrypted user name and password. The *DBA System Configuration* is installed with the *Suite Database Upgrade tool* and is an optional tool that is designed to assist the Planon system administrator by making user names and passwords automatically available to the *Suite Database Upgrade tool*.

1. Enter the connection details or click **Open** to open an existing *.ini* file and click **Save** to save the information as a *DBAConfig.ini* file. The **Save As** dialog box appears.



2. Choose/create a temporary directory to be used by the *Suite Database Upgrade tool* later.

> We recommend not to use a directory inside the Planon installation folder because the *Suite Database Upgrade tool* cannot clean that location and you would need to do it manually.

3. Click **Save** to save the *DBAConfig.ini.*
4. Click **Exit** to quit the tool.

When starting the *Suite Database Upgrade tool* , the *DBAConfig.ini* file is read and the connection settings will automatically appear. This is only true, if you place the *.ini* file in the temporary application directory. Consequently, no specific action by the Planon System Manager is required.

Running the Suite Database Upgrade Tool

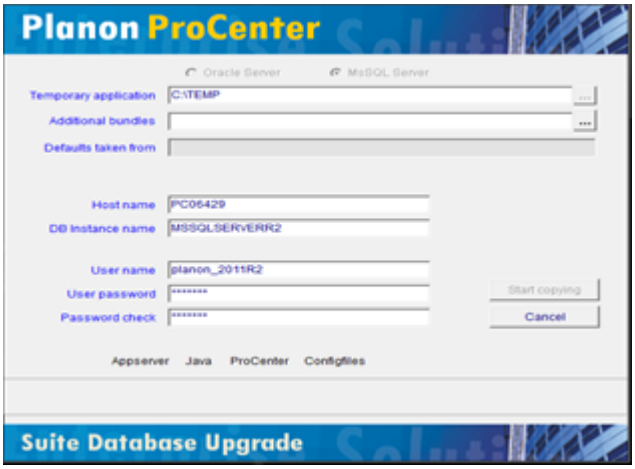
The *Suite Database Upgrade tool* is a universal tool that is to be used to upgrade existing Planon databases to a newer release.

If you run the tool mentioned in the previous chapter, certain settings may automatically appear in the *Suite Database Upgrade tool*.

For restrictions / comments / procedures on upgrading the database version in combination with the Planon suite release version, check the Release Notes.

Procedure

1. Stop all running application server and web server services.
2. Start the Suite Database Upgrade tool by double-clicking *ProCenterSuiteDBUpgrade.exe.* The following screen appears.



Connection URL does not fit

If the connection URL cannot be handled by the upgrade tool, the *planon-ds.xml* has to be updated manually before starting the tool.

The *planon-ds.xml* is located in: *...\SDUT\ConfigFiles*.

Update the connection-url of the applicable data source. In the above screen of the upgrade tool you have to enter values. These values will no longer be used because with updating the connection-url, the parameters are removed.

For Windows authentication, for example, update the connection string of the SQL entry in the ds file (replace <hostname> and <DBinstanceName> with your values):

```
jdbc:sqlserver://<hostname>
\<DBInstanceName>;integratedSecurity=true
```

For Windows authentication, the windows user who runs the upgrade is used for authenticating the database server. Add this user as a user to the database, otherwise logging in will fail.

Oracle driver

If you use Oracle as database platform, the driver of the Oracle version is installed during the installation. If you have updated the Oracle version for Planon already, the *planon-ds.xml* and the Oracle module.xml have to be updated manually before starting the tool.

1. The *planon-ds.xml* is located in: ..\SDUTConfigFiles.

Here, you must update oracle: <driver>*oraclex*</driver>

2. The Oracle module.xml is located in: ..\SDUT\AppServers \wildfly-*\modules\system\layers\base\com\oracle\main.

Here, you must update oracle: <module name="com*.*oraclex*" services="export" export="true"/>

Where *oraclex* is one of the following values:

- oracle6 for Oracle 11.1 and 11.2
- oracle7 for Oracle 12.1
- oracle8 for Oracle 12.2 and Oracle 18

3. In the **Temporary application** field, specify the folder in which the Suite Database Upgrade tool temporarily stores files.

   Through Java, a JDBC connection is made with the database; this requires an application server and program files. The *Suite Database Upgrade tool* temporarily copies software to the temporary application directory; this requires read/write access to at least this section of the disk.

   Log files created are also stored in this temporary application directory. For identification, the log files contain a date/time stamp in their name.

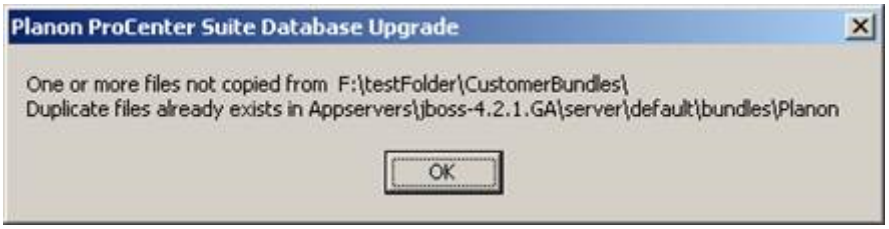
4. In the Additional bundles field, specify the location of the bundles, which are not included by default in the upgrade tool.

By default, the application also contains bundles that are delivered as part of the upgrade tool. These bundles need not be added manually to the upgrade tool.

Only specify the path for the additional TMS bundles that are specifically created for you. Put the server software for the TMS bundles in a separate folder and point to this folder in this field.

General remarks for handling bundles

- When you run the *Suite Database Upgrade tool* without specifying the additional bundles you have in use, the tool detects that the metadata in the database is not equal to the metadata in the code. During the upgrade the items in excess will be deleted. This will only be successful for items without data. For example, additional TMS System Reports will just be cleaned-up because they do not have user data, only settings/metadata.
- The standard bundles (or a newer version of these bundles) are already included in the upgrade tool. You must not point to the application server's Planon bundle folder containing these bundles, as this contains a lot of code. If you do so, you may include the code twice but with different version that may result in a version mismatch.
- The following error message is displayed if you include exact the same bundles as are already present at that location.



- If the set of bundles in your environment does not match your database, the following situation may occur:
  - If there are more bundles in the environment than in the database, the application server will go to upgrade mode. Suite DB upgrade tool should be used to add meta data of the new bundles to the database.
  - If there are less bundles in the environment than in the database, the application server will go to upgrade mode to remove meta data of the new bundles.
  - If user data exists in these bundles, you cannot remove these bundles. Hence, it is important to have the same bundles in your environment as in the database. If you add the correct bundles to a running application server the application server will automatically switch back to normal mode.
  - If a newer version of the bundles is in the environment as in the database, an upgrade is required. Suite DB upgrade tool should be used to update the meta data to the new version of the bundles.

- If an older version of the bundles is in the environment than in the database, the application server cannot be started. Note that the bundles cannot be downgraded. However, if you add the correct bundles, the application server will automatically switch back to normal mode.

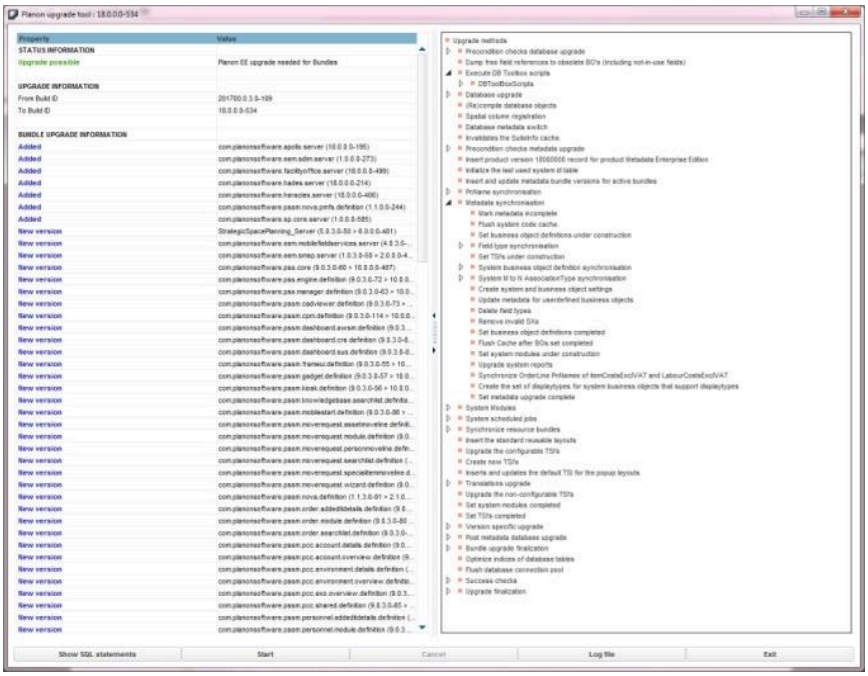
For customers upgrading from a previous version to this version

- Ensure that you upgrade all the not standard TMS bundles to this version.
- When starting the Suite Database Upgrade tool, only the Suite Release bundles from version 2013 and higher will be displayed.

5. Click **Start copying** to upgrade the existing Planon databases to a newer release.

If the data in any of the fields in the Upgrade tool is incorrect, and if you click Start copying, you cannot proceed with the upgrade. The application server stops and whatever is installed locally, remains. Correct the relevant before you click Start copying again. The following upgrade screen appears. The tool installs a separate application server and runs the Planon Upgrade client.

The status information appears in the top-left panel. For more information on status information, refer to Upgrade Tool Messages Appendix upgrade tool messages.



The left panel displays version information about the status of the bundles and database connection.

The required upgrade steps are listed on the right. When these steps are executed, the time required for each

upgrade step is displayed on the right (as well as a total duration of the upgrade).

6. Click **Start** . The upgrade steps are performed.
7. Click **Exit** when the upgrade steps are complete.
8. You will come back to the first screen. Close the upgrade tool.

The *Suite Database Upgrade tool* then removes all temporary files except the log files. You have now successfully upgraded your Planon database. The log files will now be available in your temporary application directory.

You can now proceed to install *Planon ProCenter*

Upgrade Tool Messages

Status information	Reason	Application Server Status
Upgrade not possible	The database server software version is not supported.	Unable to start
Upgrade not possible	A Planon ProCenter Windows Client version before 200710 has been detected. After upgrading to the supported Planon ProCenter Windows Client version, restart the Application Server.	Unable to start
Upgrade not possible	An unsupported Planon ProCenter version has been detected. Probably running an Upgrade tool of an older release instead of a newer version.	Unable to start
Upgrade not possible	Bundles update to an older version. Bundle down grade not allowed	Unable to start
Upgrade not possible	The last upgrade was not successful.	Unable to start
Upgrade possible	Database upgrade needed <CURRENT VERSION> --> <REQUIRED VERSION>	Conversion Mode
Upgrade possible	Bundle upgrade needed	Conversion Mode

Upgrade not possible	Database is up to date; no conversion is needed (also displayed after successful conversion).	Normal Mode

Index

A

Appendix Upgrade Tool Messages 13

D

DBA System Configuration Tool 6

M

Minimum Requirements 5

R

Retrieving the Suite DB Upgrade Tool 6
Running the Suite Database Upgrade Tool 8

S

Suite Database Upgrade 5
Suite Database Upgrade - Appendix Upgrade Tool Messages 13
Suite Database Upgrade - DBA System Configuration Tool 6
Suite Database Upgrade - Minimum Requirements 5
Suite Database Upgrade - Retrieving the Suite DB Upgrade Tool 6
Suite Database Upgrade - Running the Suite Database Upgrade Tool 8
Suite Database Upgrade - Upgrading the database 6

U

Upgrading the database 6