# GoPlant Enterprise Edition
# Version Upgrade

# Contents

## Conventions Used in this Manual

**Click:** Position the mouse over an item and press the mouse button.

**Link, Hyperlink:** Text displayed on your browser that will display a new GoPlant screen when you click on it. Links are usually displayed in blue, with an underline.

**Hierarchy:** GoPlant organizes resources into a "tree" whose branches and sub-branches (possibly many levels of sub-branches) are known as Storage groups. The resource "tree" is usually envisioned upside-down, with the trunk of the tree (the root group) at the top.

**Screen, Page, Web Page:** A screen displayed in your Web browser.

**Select:** Use the mouse to highlight an item or choose from a list of items.

# GoPlant Enterprise Edition Installation Prerequisites:

Please refer to the GoPlant Enterprise Installation manual for detailed Hardware and Software requirements.  If GoPlant is already installed and running in your environment your servers are already compatible.

## GoPlant Upgrade Checklist:

1.  Obtain the GoPlant Upgrade software.
2.  Locate your installation documentation and server location(s).
3.  Unzip the GoPlant installation files to a safe location on the server.
4.  Review the GoPlant Release Notes for the new version of GoPlant.
5.  Review these instructions and obtain an overview of the upgrade procedure.
6.  Follow instructions step by step until completion.

# Web Site Upgrade Procedure:

1. Log into the GoPlant IIS Web server with account that has permissions to modify the web site files as well as start/stop the Microsoft IIS server instance.
2. Open the Microsoft IIS Manager UI.
3. Locate the GoPlant web site in the IIS server tree view.
4. Stop the website (if not already stopped).
5. Make any updates to the IIS framework updates as called out in the GoPlant Release Notes.
6. Use the right-click menu on the GoPlant web site to "explore" the website files, or simply open a Windows Explorer window and browse to the GoPlant web site folder location.
7. Create a backup copy of the current GoPlant website folder.  Maintain this copy for an archive or restoration if required.
8. The GoPlant website update contains everything required except for the two web.config files that are currently in the GoPlant website folder.  The file locations are <website_base_location>\API\web.config and <website_base_location>\web.config.  These two configuration files will be kept in this directory while all other files are deleted.  If a mistake is made you can always revert to the archive copy to replace your web.config files.
9. Verify your backup copy exists, then delete all files within the GoPlant website parent folder except:
   a.  <website_base_location>\API\web.config
   b.  <website_base_location>\web.config
10. When completed, you should have an API folder with one web.config file in it, and the web.config file from the parent website folder.
11. The GoPlant website update contains new and updated subfolders and files except the two web.config files you saved in the previous steps.
12. Make any updates to the web.config files as called out in the GoPlant Release Notes.
13. Locate the GoPlant Website folder in your installation files location.
14. You may have been given both an '~ Upgrade' and '~ Installation' version of the zip files.  PLEASE ENSURE you unzip only the '~ Upgrade' version of the GoPlant software.  Some file transfer locations include two zip files; we try to only distribute what you specifically need.  DO NOT use the "New Install" zip file as it will overwrite your configuration files and you will have to restore and start again.
15. Copy all the new website files and subfolders into the GoPlant website folder.
16. This completes the file updates and configuration changes required for the website.

17. Please continue with the rest of the instructions to complete all steps before restarting the website.
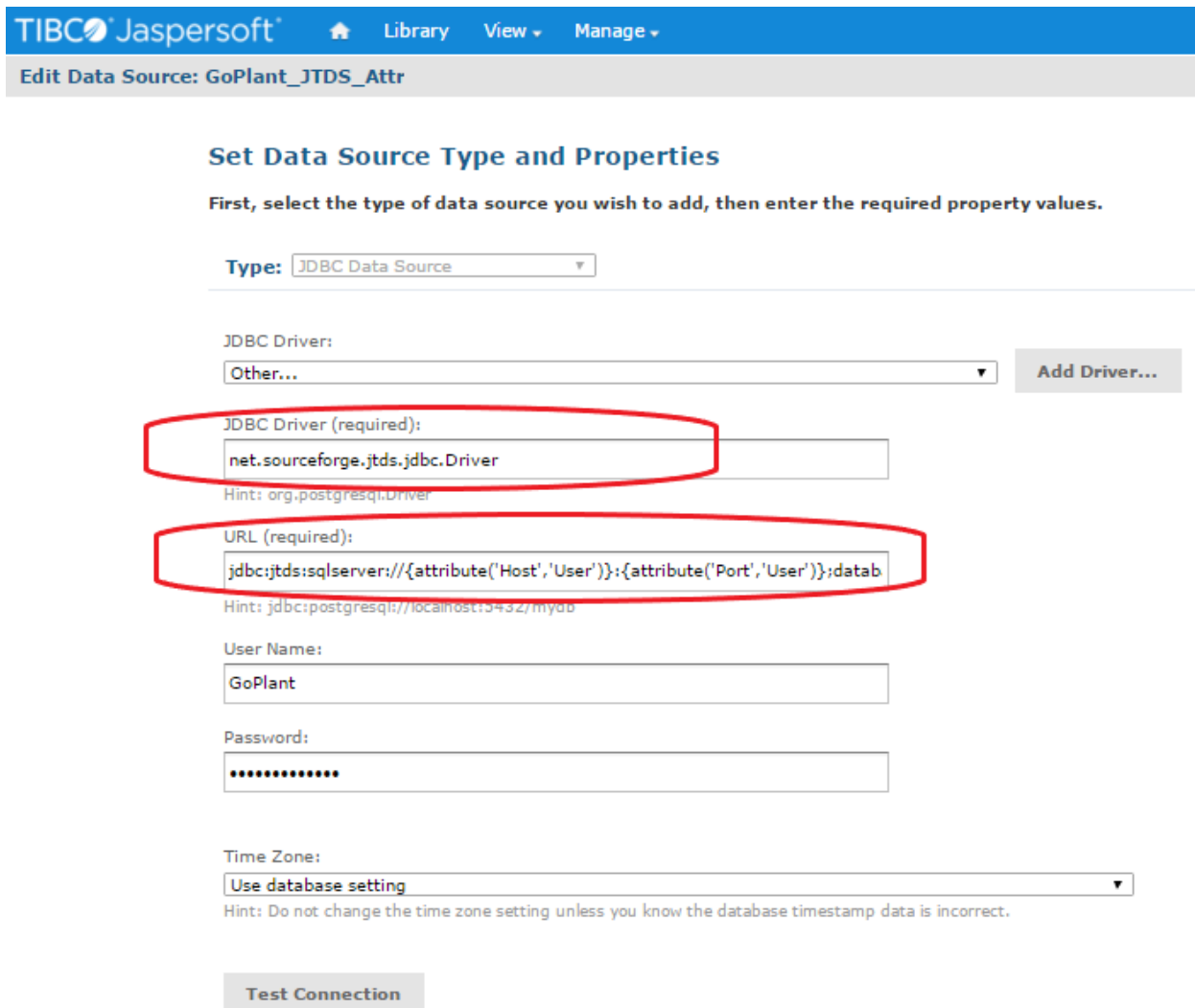
# Reporting Server update (Jaspersoft®):

1. Complete this section only if the upgrade files included a GoPlant Reports update zip file. If no report update zip file is included with your upgrade files, please skip this section and continue with the other updates.

2. Log into the GoPlant IIS web server or server configured with the Jaspersoft CE software.

3. Open a web browser and connect to the Jaspersoft server. If your installation used defaults then enter 'localhost:8080/jasperserver/login.html' in a web browser:
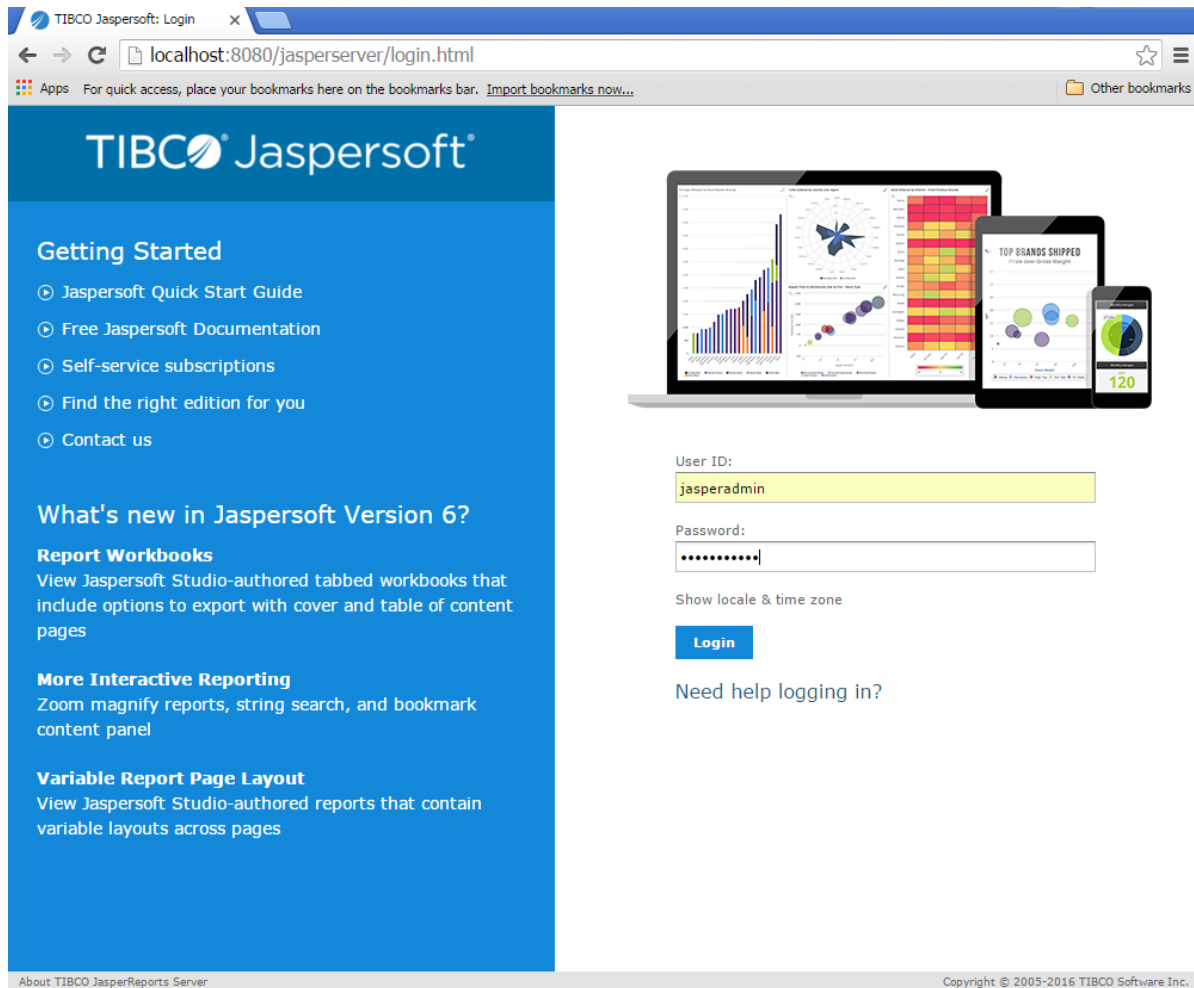


NOTE: The default login is 'jasperadmin' with a password 'jasperadmin'. During GoPlant installation you were prompted to change this password, so please refer to your installation notes. If your installation was modified on another server, adjust the instructions per your installation notes. If the password has been changed please reference your company installation notes.

4. In the Folder navigation window, locate the 'Production' folder, and expand it. Open the child 'Data_Sources' folder and select it. This will display the "GoPlant_JTDS_Attr" JDBC Data Source in the Repository on the right-hand side. Highlight this entry (GoPlant_JTDS_Attr) and then the "Edit" button will become available. Press the edit button, and referencing the image below, ensure that you take a screen shot or have written down all entries / settings for this data source. This also includes the User Name and Password settings.



**\*\*\*\*PLEASE ENSURE YOU HAVE BACKED UP or COPIED these settings before proceeding with the report update!!!!**

The Jasper reports Zip file will **OVERWRITE** the existing data source settings. This cannot currently be changed (it is a Jasper software function, not GoPlant).

At a minimum, your specific GoPlant database User name and password must be re-entered after completing the following steps.
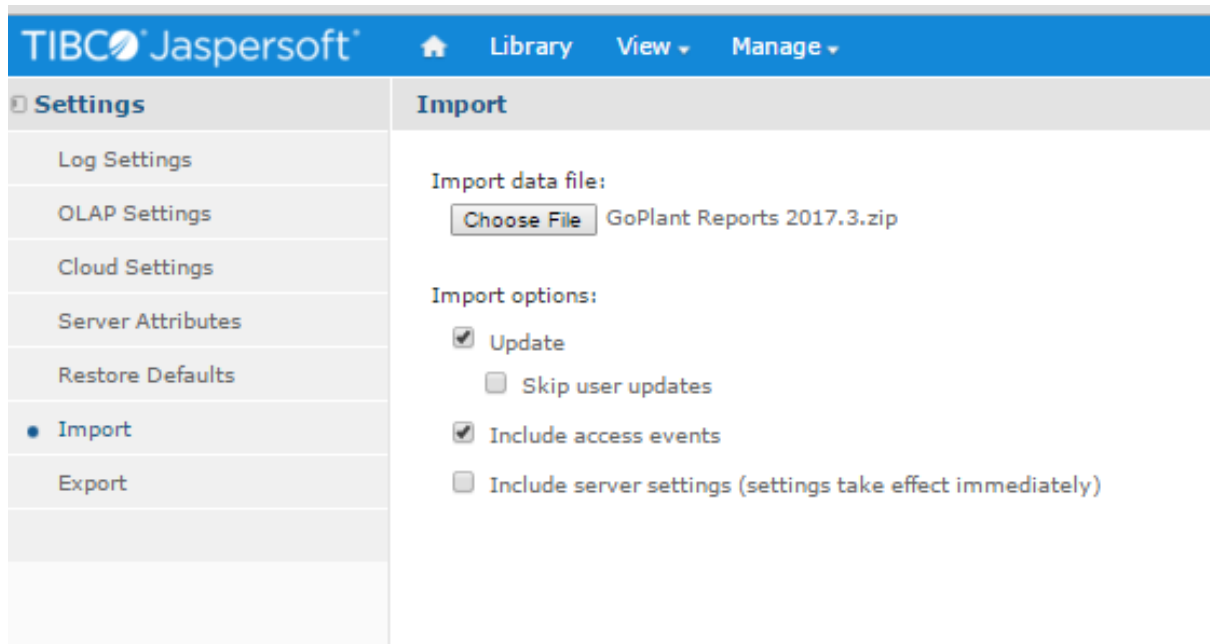
5. Now that the Data Source settings are known and copied, select the 'Manage' menu and choose 'Server Settings:
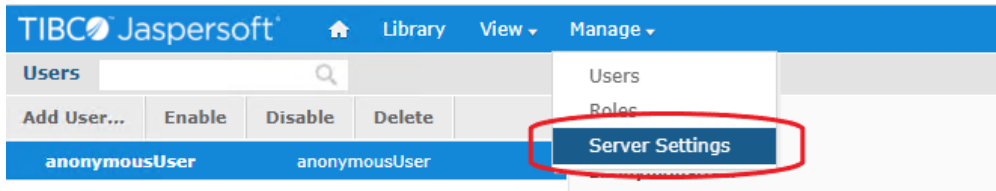


6. Choose the 'Import' selection from the left-hand Settings menu:
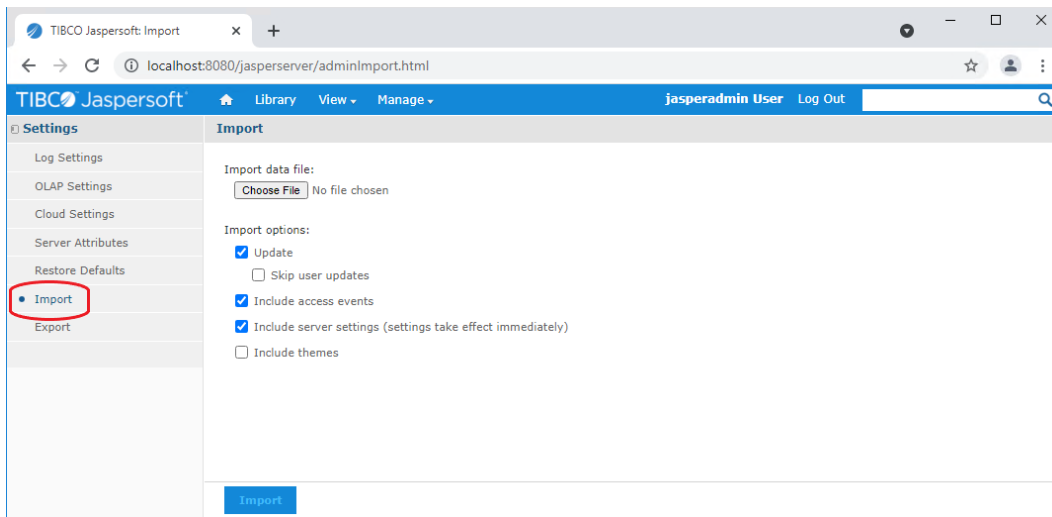
7. Click on the 'Choose File' button:



NOTE:  The file name listed in the image above may not match the upgrade version you are installing.  This image is for reference only.

8. Locate and select the "GoPlant Reports *.zip" file included in the installation files "GoPlant Reporting" folder.  DO NOT unzip the file.  Jasper requires the zipped file to be used.

9. Select the "Open" button in the pop-up window.

10. UNCHECK the last "Include server settings (settings take effect immediately)" option.

11. Have you backed up / copied the data source settings?  This MUST be done before continuing with the import.  Please go back and review step #5 on page 8 now.  We cannot stress this step enough to ensure you do not have issues after the reporting files update.  Jaspersoft OVERWRITES the data source settings during each Import.

12. After the zip file has been selected and the option unchecked click on the BLUE 'Import' button at the bottom of the Import window.

13. Once the import is complete, click on the 'Close' button or wait for it to clear:
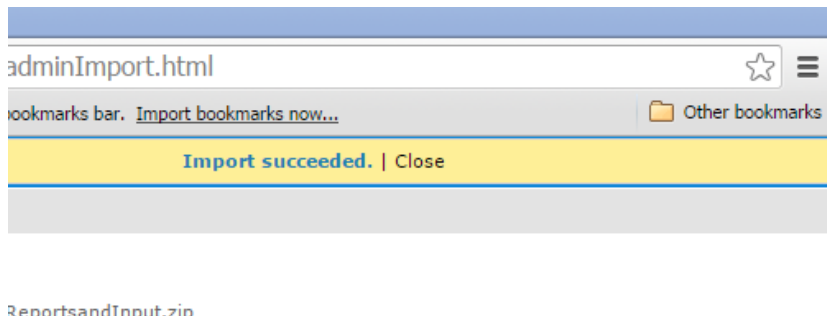


14. Click on the "Home" icon, and then expand the 'Production' folder, and open the 'Data_Sources' folder from the Folders tree view on the left. Your folder tree may vary from the image below.
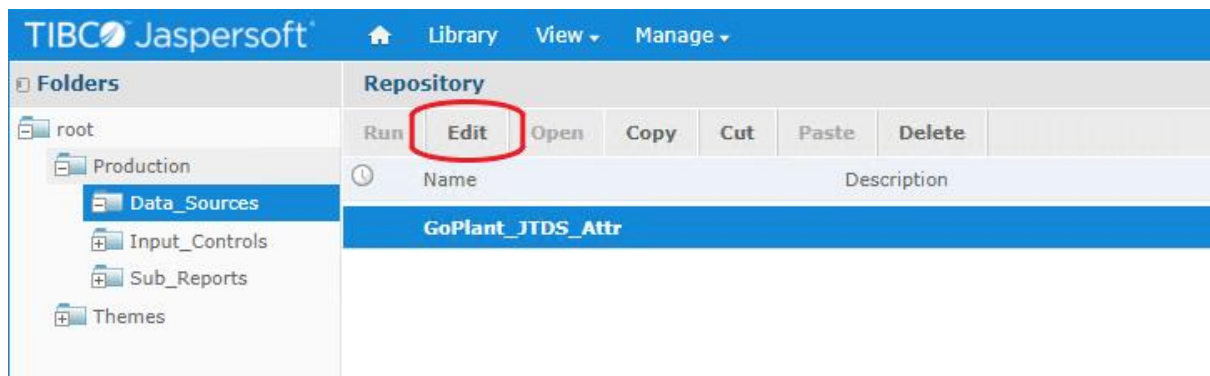


Click on the 'Edit' button after you have highlighted the "GoPlant_JTDS_Attr" data source. This will launch an 'Edit Data Source: GoPlant_JTDS_Attr' window.

15. The Data Source was modified during the update. Now refer to your notes and change the Data Source settings based upon your copy / backup of the information. In some cases, only the User Name and Password will need to be updated. Other update type steps for the URL and other items are included in the following steps. Adjust your changes accordingly.

16. Skip this step if your Data Source tested OK after changing the Username and Password – this is for reference if other changes are required:

If the GoPlant_JTDS_Attr data source is new and you previously had a different report folder installation, Choose the "Other…" in the JDBC Driver: section:

After choosing the "Other…" choice, the "JDBC Driver (required):" and "URL (required):" entry boxes will appear.

Enter "net.sourceforge.jtds.jdbc.Driver" in the "JDBC Driver (required):"entry box.

Enter "jdbc:jtds:sqlserver://{attribute('Host','User')}:{attribute('Port','User')}/{attribute('Database','User')}" in the "URL (require):" entry box.

The Username and Password will contain the default "GoPlant" and "P@ssw0rd".  If your installation used the defaults, then you will not need to update these values.  Please refer to your installation documentation and update the Username and Password fields as shown below accordingly.  This username and password are the credentials used by the IIS server to connect to the GoPlant SQL server database.

17. Test your connectivity by clicking on the "Test Connection" button as show.  Once the Connection passed information is shown, click on the blue 'Save' button to close this window.



Errors in connecting to the GoPlant database will appear in red.  If your installation uses an Active Directory user to connect to the database, please adjust the URL string appropriately for the JTDS driver.  Instructions are attached in Appendix A of this installation document.

If your SQL server uses an instance name for the GoPlant database, you will need to add a ";instance=<instance_name>" parameter at the end of your URL.

If the username and password is an Active Directory user with a domain, then you will need to add a ";Domain=<Domain_name>" parameter at the end of your URL.

18. After the connection is completed and verified, click on the blue "Save" button at the bottom of the Data Source editing window.

19. The "Save" pop-up window will then appear.  Do not change any data in this window.  Leave all data as default and simply choose the blue 'Save' at the bottom of the pop-up window:

20. This completes the website updates to the Jaspersoft server. Choose the 'Log Out' in the top right menu. The web browser may be closed.

# GoPlant Database Upgrade Procedure:

1. The GoPlant database upgrade should only be done by end users familiar with Microsoft SQL services and Windows Server functionality. These instructions are high-level and assume inherent knowledge of databases and the MS SQL Management Studio.

2. The GoPlant website should still be stopped. If not, please refer to steps #1 through #4 of the Website Upgrade Procedure to stop the GoPlant website before proceeding with the Database update. All connections to the GoPlant database should be stopped before executing these database update steps.

3. Obtain the GoPlant DB Update Version XXXX.Y.sql script in the upgrade installation files. Note the script name will vary depending upon the new release of GoPlant.

4. Log into the GoPlant Database server (or simply the SQL instance) with an account that has access to the SQL server and update permissions on the GoPlant Database. This account must also have write and modify permissions to the GoPlant database.

5. Open the Microsoft SQL Server Management Studio.

6. Connect to the proper Database instance and locate the GoPlant database specified in the web.config file for your GoPlant web server.

7. Open the *.sql file via the 'Open Query' command.

8. Execute the SQL script against the GoPlant database to upgrade it to the latest version.

9. Verify that the SQL commands ran and completed properly. Please contact goplant.techsupport@skf.com immediately if there are errors.

10. This completes the GoPlant database update.

11. Please Log back into the IIS server and START the GoPlant website. This completes the GoPlant software update. Please continue to the "Upgrade Verification" section.

# Upgrade Verification:

1. Ensure that you have restarted any services stopped (IIS website).

2. Open a Web Browser.

   Type your **GoPlant URL** in the address bar (example: http://goplant). The **Login** page appears.
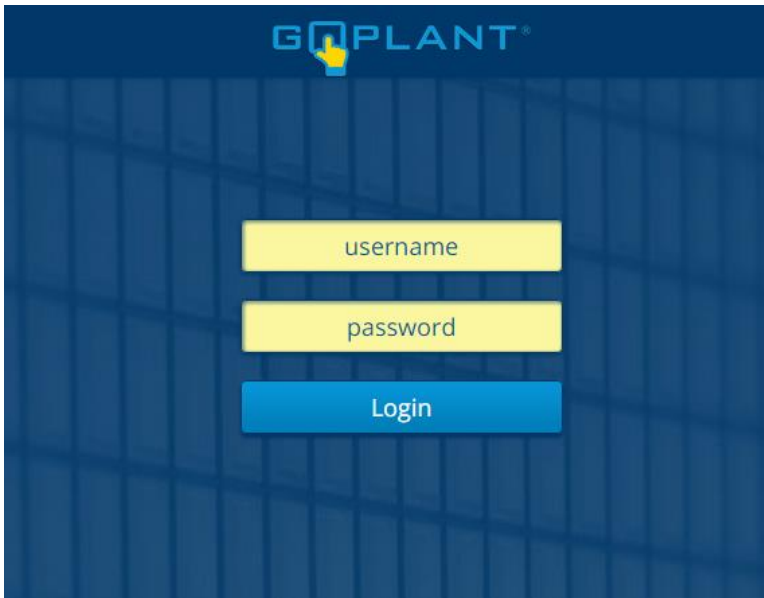


3. Log into GoPlant, then click  at the top right-hand portion of the page. The **About GoPlant** window opens.  Verify that the Version # has been updated (Example below)

# Copyright Notice

Information contained in this document is proprietary to SKF USA and may be used or disclosed only with written permission from SKF USA. This document, or any part thereof, may not be reproduced without the prior written permission of SKF USA.

This document refers to numerous products by their trade names, in most, if not all, cases these designations are Trademarks or Registered Trademarks by their respective companies.

This document and the related software described in this manual are supplied under license or nondisclosure agreement and may be used or copied only in accordance with the terms of the agreement. The information in this document is subject to change without notice and does not represent a commitment on the part of SKF USA, Inc.

The names of companies and individuals used in examples in the manuals, and in any sample databases provided, are fictitious and are intended to illustrate the use of the software. Any resemblance to actual organizations or individuals, whether past or present, is purely coincidental.