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SMARTTEAM PROCEDURE FOR UPGRADING TO V5R16

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CHAPTER 1: OVERVIEW

General

SMARTEAM V5R16 provides a powerful set of services and tools to facilitate the centralized administration of the SMARTEAM environment, in order to reduce costs and to make it easier to configure, manage and maintain the SMARTEAM environment introduced in V5R16 versions.

This document will guide you through the upgrade process; from SMARTEAM V5R13/V5R14 to SMARTEAM V5R16. It is the same upgrade process for V5R13 to V5R16 as V5R14 to V5R16. It is recommended that you read the entire document before proceeding with the hands-on migration.

The target audience is technical personnel, such as application engineers and technical consultants who are conducting the migration of existing customers to SMARTEAM V5R16.

This information herein is intended only for those who are upgrading a previous installation, and is not intended for new customers who are installing SMARTEAM V5R16 on a 'clean' system.

Note: When upgrading to V5R16 from a version previous to V5R13 you must first upgrade to V5R13 or V5R14. For further details refer to SMARTEAM Procedure for Upgrading to V5R13 or SMARTEAM Procedure for Upgrading to V5R14).

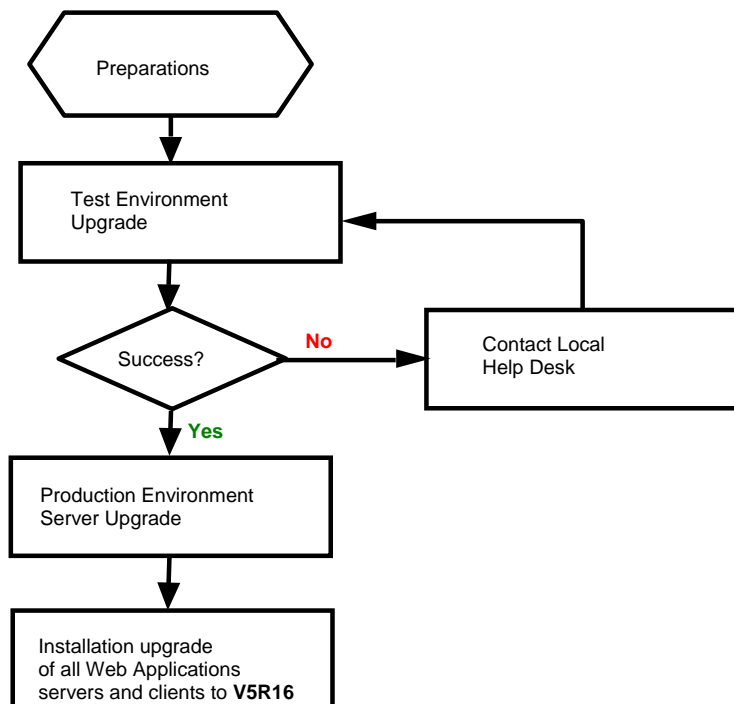
Hardware and Software

Before starting the actual upgrade process, make sure your hardware and software are compatible with SMARTEAM V5R16 requirements. Refer to SMARTEAM V5R16 Hardware and Software Requirements for latest updates and changes, such as:

- Supported Servers and clients Operating Systems.
- Supported CAD versions
- Supported database versions
- Supported LUM versions

CHAPTER 2: MIGRATION PROCESS PRINCIPLES

Process Flowchart



The overall migration process is divided into two main stages:

- Stage 1 - Test Environment upgrade: SmarTeam Corporation highly recommends running the upgrade on the Test environment first, in order to verify SMARTEAM system integrity in an isolated environment, and to avoid possible impact on the functioning of the Production environment. This test phase also allows you to familiarize yourself and gain experience with the step-by-step technical procedures of the upgrade. For further details refer to [Stage 1: Test Environment](#).
- Stage 2 - Production Environment upgrade:
 - **Phase 1 - Production Server Upgrade.** After the Test Environment upgrade has been completed successfully; proceed with the upgrade of the Production Environment.
 - **Phase 2 - Web Servers Upgrade.** After the SMARTEAM data has been migrated in production, then proceed with the installation upgrade of all the SMARTEAM Web servers when applicable (i.e. SMARTEAM – Web Editor and/ or SMARTEAM – Community Workspace servers)
 - **Phase 3: Client Machines Upgrade.** Then proceed with the installation upgrade of all clients' applications, such as SMARTEAM – Editor, CAD Integrations, SMARTEAM - BOM.

For further details refer to [Stage 2: Production Environment](#).

Machines Required for Upgrade Process

In order to simplify and regulate the whole process of the Test and Production stages of the migration procedure, it is highly recommend to use dedicated computer(s). They should be in the same location where they can access all the required data and software necessary for a successful migration.

In the test environment the following machines should be used:

Machine 1 - SMARTEAM Core Service Server

This machine hosts the SMARTEAM V5R16 Core Services, including:

- Session Management service, which enables a centralized authentication of SMARTEAM users
- System Configuration service, which enables centralized control of all SMARTEAM configuration settings
- Vault Service
- Workflow Service

Machine 2 - Client

This machine is required in order to perform:

- Upgrade of the WizSrc database to V5R16
- Run the SMARTEAM Data Model Designer utility
- Upgrade of the SMARTEAM Client Applications

Stage 1: Test Environment

Summary of the Upgrade Process

This section contains a brief summary of the migration activities required in the Test Environment.

Prerequisites:

As every Web Server has SMARTEAM – Editor installed on it, if you are going to upgrade the Web Server, you must reset IIS before the SMARTEAM – Editor Upgrade process.

Upgrade Procedure:

You must complete all the stages in the order listed in this table to successfully upgrade SMARTEAM in the Test Environment to V5R16. This table also includes links to the detailed explanation of each activity, which are provided later in this document.

| Upgrade Stage | Machine to Use | Activities Required |
|---------------------------------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Core Services Upgrade | Core Services Server | Install SMARTEAM – Foundation V5R16 with the latest Service Pack including Core Services (Session Management Service and System Configuration Service) |

| Upgrade Stage | Machine to Use | Activities Required |
|---------------------------------------------------------|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Client Machine Upgrade | Client Machine | Install SMARTEAM – Editor & additional applications installed at the customer site |
| WizSrc Upgrade | Client Machine | Run the SmarTeamWizSrcUpgradeWizard tool (this utility actually extends the customer's current database to support the new features added in V5R16). |
| Running the Data Model Designer Utility | Core Services Server | Create SMARTEAM Database using the SMARTEAM Data Model Designer |

Stage 2: Production Environment

Summary of the Upgrade Process

This section contains a brief summary of the migration activities required in the Production Environment.

Prerequisites:

1. As every Web Server has SMARTEAM – Editor installed on it, if you are going to upgrade the Web Server, you must reset IIS before the SMARTEAM – Editor Upgrade process.
2. Backup the SMARTEAM script directory.
3. Backup the configuration settings files, which is located under SMARTEAM Home Directory/ConfigurationSettings directory.

Upgrade Procedure:

You must complete all the stages in the order listed in this table to successfully upgrade SMARTEAM in the Production Environment to V5R16. This table also includes links to the detailed explanation of each activity, which are provided later in this document.

| Upgrade Stage | V5R16 Machine to Use | Activities Required |
|---------------------------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phase 1 - Production Server Upgrade | | |
| Core Services Upgrade | Core Services Server | Install SMARTEAM – Foundation V5R16 with the latest Service Pack including Core Services (Session Management Service and System Configuration Service). |
| WizSrc Upgrade | Client Machine | Conduct an upgrade of the WizSrc database copy to V5R16 using the SmarTeamWizSrcUpgradeWizard tool. |
| Running the Data Model Designer Utility | Core Services Server | Create SMARTEAM Database using the SMARTEAM Data Model Designer |
| Phase 2 - Web Servers Upgrade | | |
| Upgrade Web Servers | Web Server | Proceed with upgrade of SMARTEAM - Web Editor & Web Navigator Server if relevant and/or proceed with upgrade of SMARTEAM - Community Workspace Server if relevant |

| Upgrade Stage | V5R16 Machine to Use | Activities Required |
|---------------------------------------------|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phase 3 - Installation upgrade | | |
| Upgrade all Client Machines | All Client Machines | Proceed with upgrade of all SMARTEAM V5R16 applications, which are installed on the clients in the following order: <ul style="list-style-type: none">• SMARTEAM – Editor, which includes CAD Integrations and SMARTEAM – FDA• SMARTEAM - BOM |

CHAPTER 3: MIGRATION ACTIVITIES

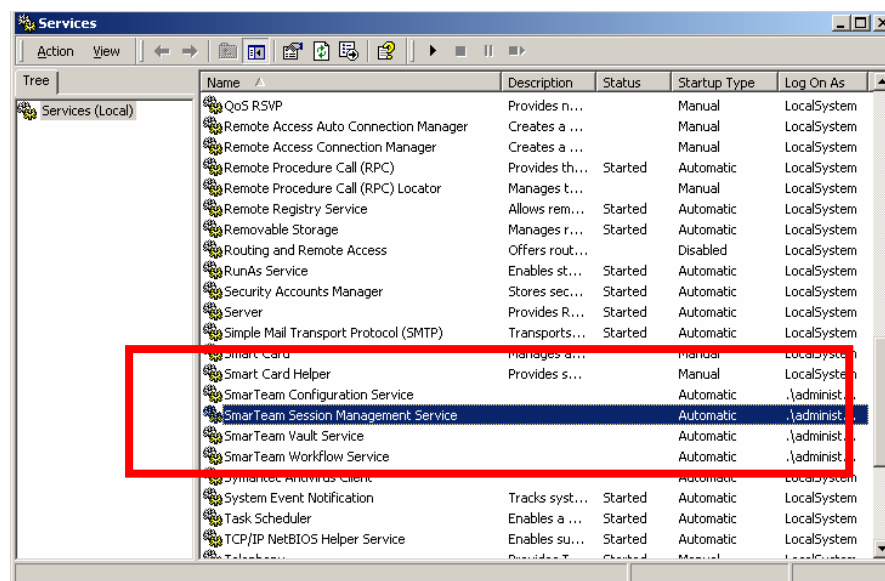
Core Services Upgrade

This section needs to be performed for both Test & Production Environments.

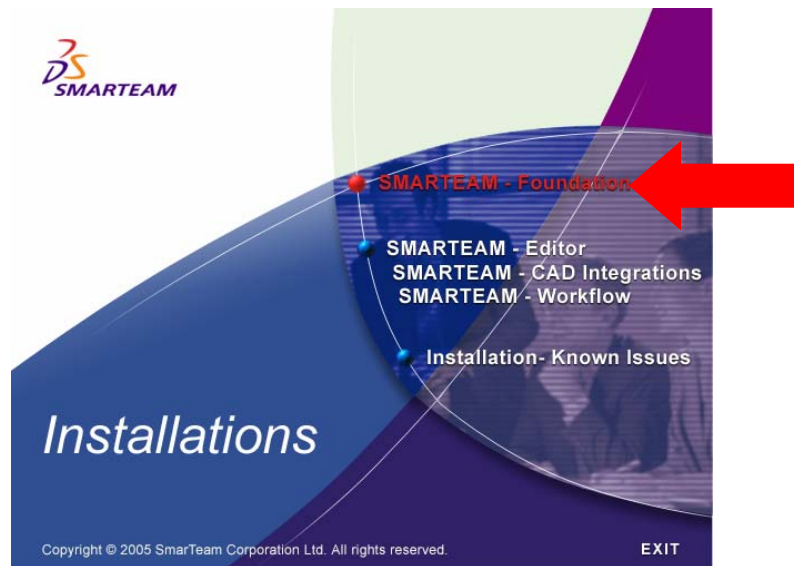
To prepare this server, install SMARTEAM – Foundation V5R13/V5R14 with the latest Service Pack on the V5R13/ V5R14 Core Services Server. Make sure you include the Core Services (Session Management Service and System Configuration Service).

In order to upgrade SMARTEAM Foundation, perform the following steps:

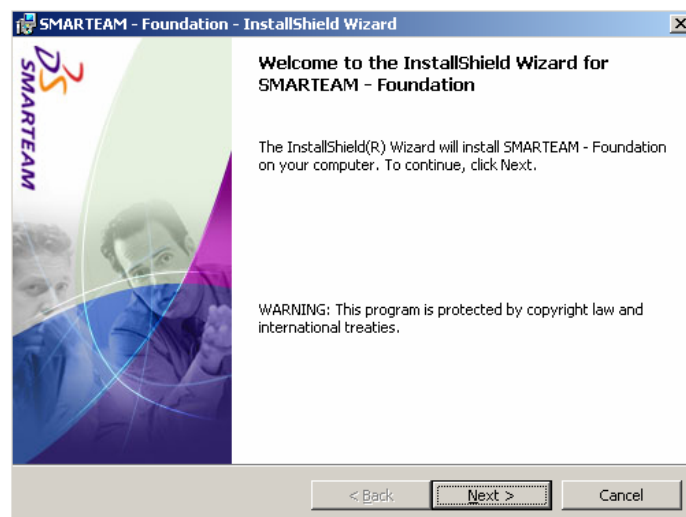
1. Stop all of the following SMARTEAM Services:
 - ☐ SmarTeam Configuration Service
 - ☐ SmarTeam Session Management Service
 - ☐ SmarTeam Vault Service
 - ☐ SmarTeam Workflow Service



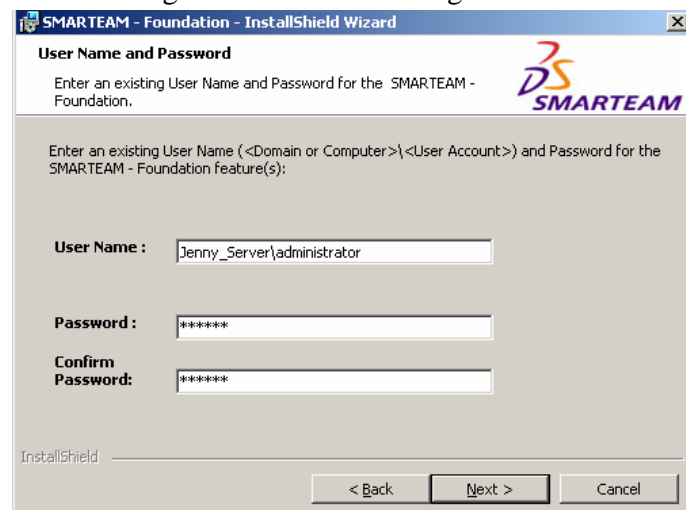
2. Insert SMARTEAM Foundation Installation CD and select **SMARTEAM-Foundation**.



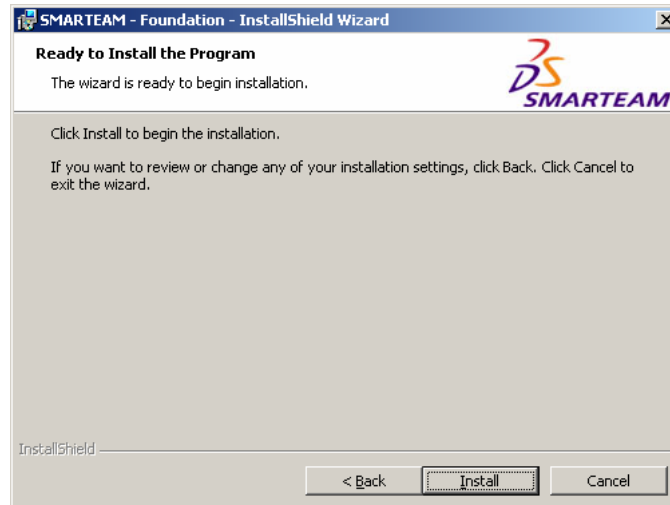
3. In the Welcome window click **Next**.



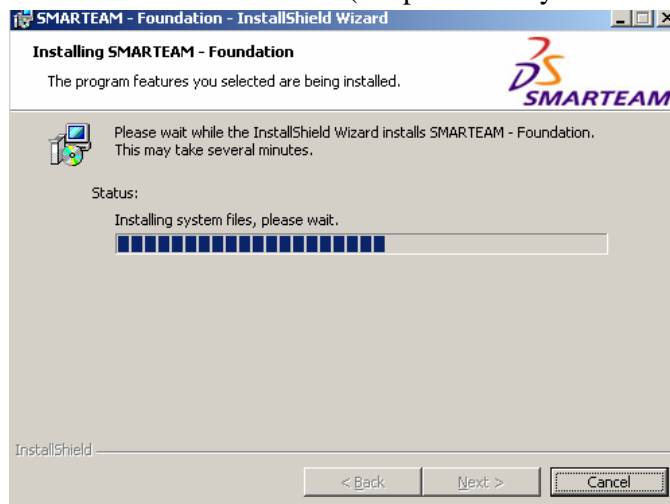
4. In the User Name and Password window enter your User Name and Password. It should be the same login that was used during SMARTEAM Installation. Click **Next**.



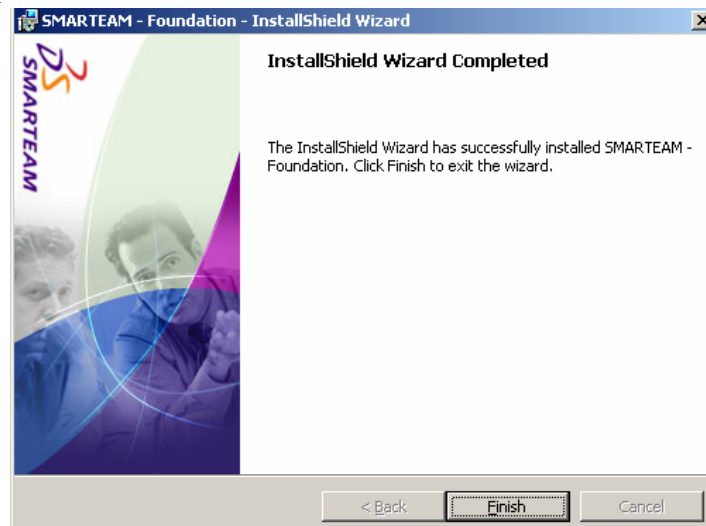
5. In the Ready to Install the Program window click Install.



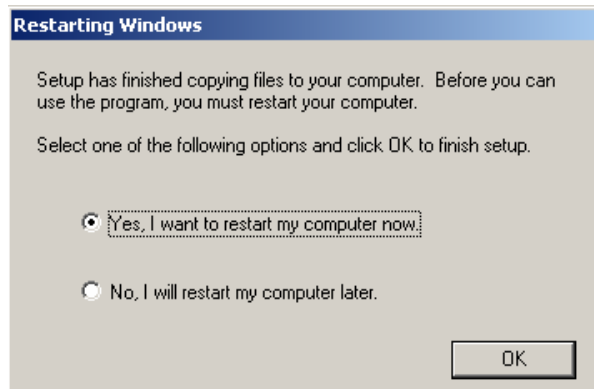
6. During the upgrade process the status of the progress will be shown in the Installing SMARTEAM – Foundation window (the process may take a few minutes).



7. When the upgrade process has finished the InstallShield Wizard Completed window will appear. Click **Finish**.



8. In the Restarting Windows window; select “Yes, I want to restart my computer now” and click **OK**.



9. Your machine will be rebooted. The Core Services that you stopped at the beginning of this process will be started automatically.
10. The upgrade of the Core Services is completed.
11. Reconfigure the Workflow Server. The database connections of the Workflow Server service must be redefined through the Workflow Server Setup tool.
12. Reconfigure the Vault Server. After installing Vault Server component of SMARTEAM – Foundation V5R16, activate the Vault Server Setup application and reconfigure the hostname (when using NetBIOS) or IP Address (when using TCP/IP) of the machine where the Vault Server Service is installed.
13. If you have additional Vault/Workflow Foundation servers, now you can run the upgrade procedure on them. During upgrade of these servers, uncheck the option to install the Core Services on the same machine with Vault/Workflow, and indicate the dedicated computer on which the Core Services were installed.

Note: If the Core Services are installed on a dedicated computer separately from the Vault and/or Workflow server, the Core Services installation must be run first.

Client Machine Upgrade

This section needs to be performed only for the Test Environment.

The V5R16 Client Upgrade Machine will be used for the upgrade of:

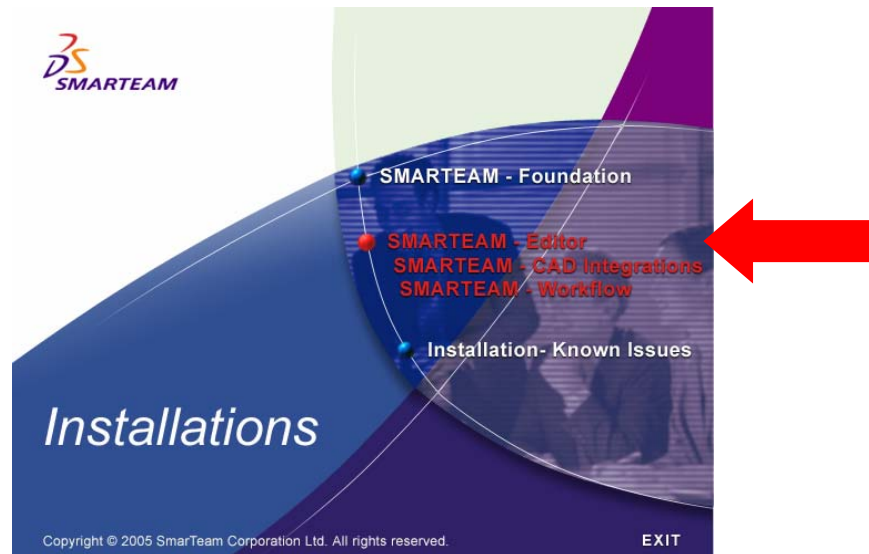
- WizSrc – to allow previously prepared custom templates to be saved into the upgraded database.
- Running the Data Model Designer Utility – to apply the modifications that were added in V5R16
- Test the client - server connection

In addition, this machine will be used for verification of the SMARTEAM authentication mechanism.

To upgrade the client machine:

1. Verify that the V5R16 Client Machine has access to the V5R16 Core Services Server.

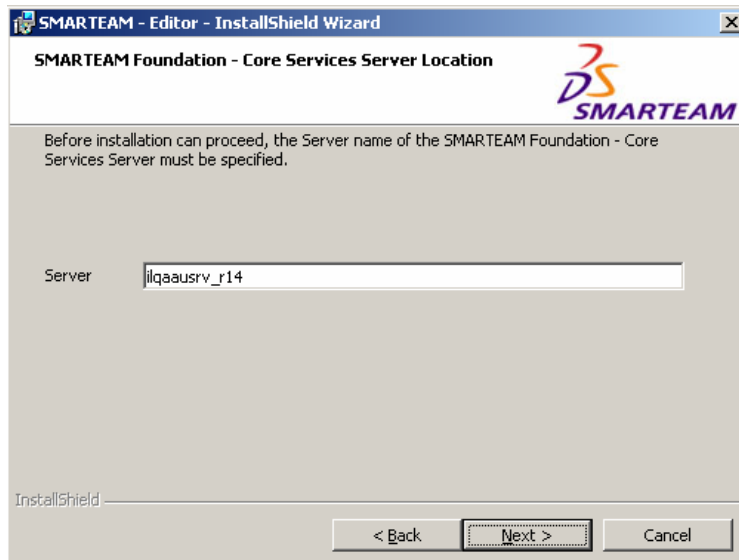
2. Verify that the Data Model Designer has been installed on the client machine where the SMARTEAM – Editor upgrade will be performed.
3. Insert SMARTEAM – Editor Installation CD and select SMARTEAM Editor.



4. In the Welcome Window click **Next** to display the Location window (this may take a few minutes).

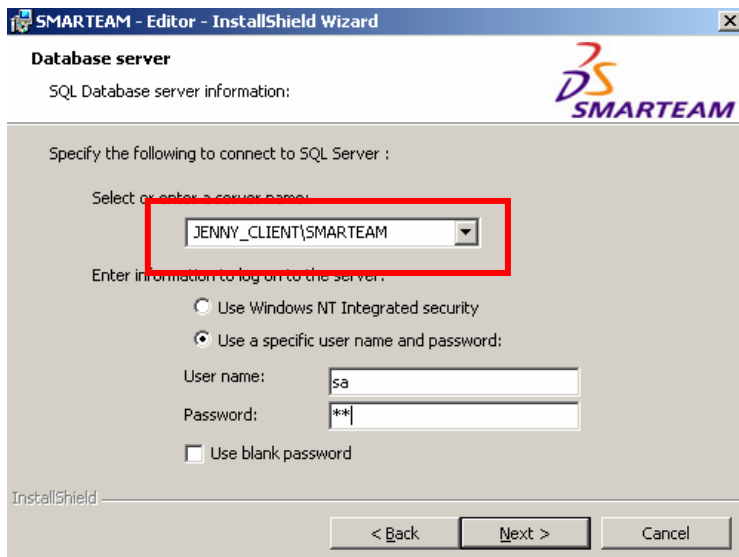


5. In the SMARTEAM – Foundation Core Services Server Location window, enter the name of the test server and click **Next**.



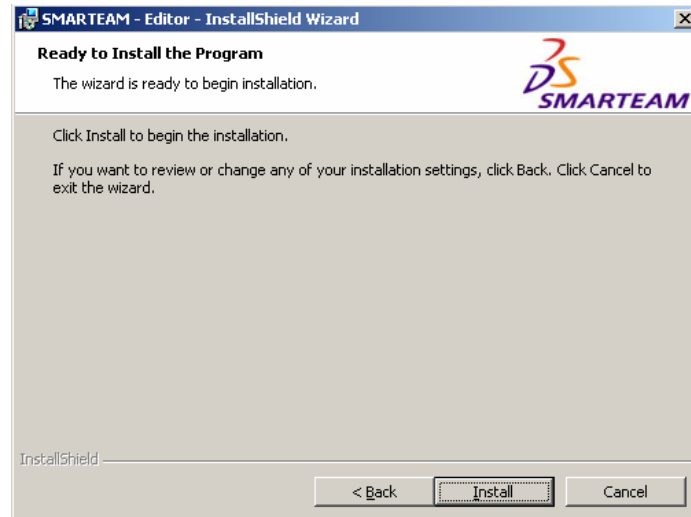
The screenshot shows the 'SMARTEAM - Editor - InstallShield Wizard' window. The title bar reads 'SMARTEAM - Editor - InstallShield Wizard'. The main title is 'SMARTEAM Foundation - Core Services Server Location'. Below the title, there is a message: 'Before installation can proceed, the Server name of the SMARTEAM Foundation - Core Services Server must be specified.' A text box labeled 'Server' contains the text 'ilqausrv_r14'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted.

6. In the Database Server window:
- Select the name of SQL server.
 - Enter login and password (the default is sa/sa).
 - Click **Next**.

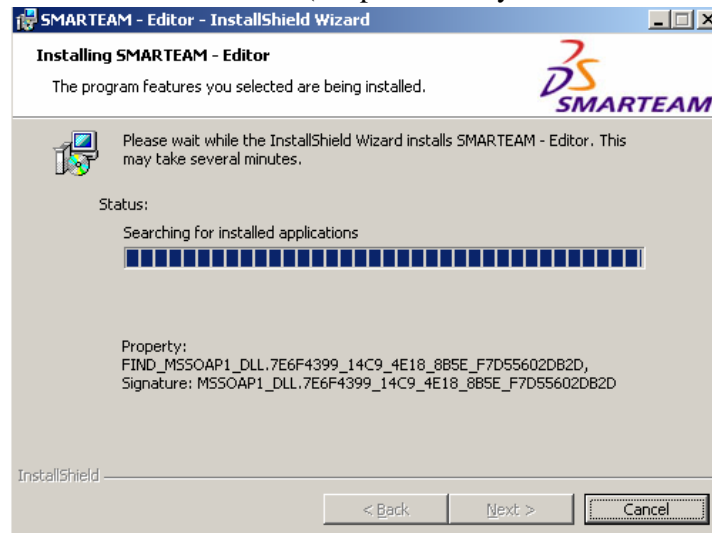


The screenshot shows the 'SMARTEAM - Editor - InstallShield Wizard' window. The title bar reads 'SMARTEAM - Editor - InstallShield Wizard'. The main title is 'Database server'. Below the title, there is a message: 'SQL Database server information:'. A section titled 'Specify the following to connect to SQL Server :' contains a dropdown menu labeled 'Select or enter a server name:'. The dropdown menu is open, showing 'JENNY_CLIENT\SMARTEAM'. Below this, there is a section titled 'Enter information to log on to the server:'. It contains three radio buttons: 'Use Windows NT Integrated security' (unselected), 'Use a specific user name and password:' (selected), and 'Use blank password' (unselected). Below the radio buttons, there are two text boxes: 'User name:' containing 'sa' and 'Password:' containing 'sa'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted.

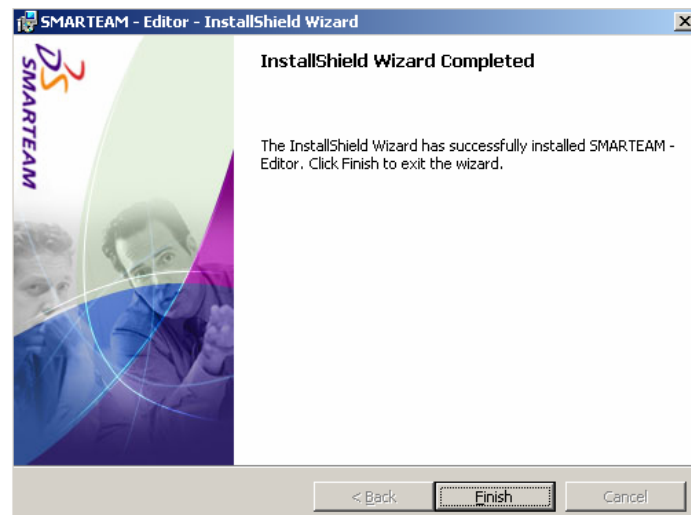
7. In the Ready to Install the Program window click **Install**.



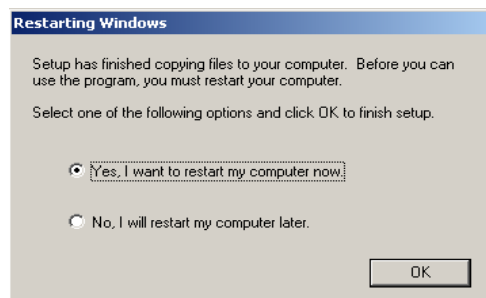
8. During the upgrade process the status of the progress will be shown in the Installing SMARTEAM – Editor window (the process may take a few minutes)



9. When the upgrade process has finished the InstallShield Wizard Completed window will appear. Click **Finish**.



10. In the Restarting Windows window; select “Yes, I want to restart my computer now” and click **OK**.



11. Your machine will be rebooted.
12. Copy all your existing SMARTEAM scripts into the <SMARTEAM home>\Script directory on the V5R16 Client Machine.
13. The client machine upgrade process has been completed.

Note: When upgrading SMARTEAM – Editor, the installation process identifies the existing installed integrations as well as other components, and automatically upgrades them to V5R16.

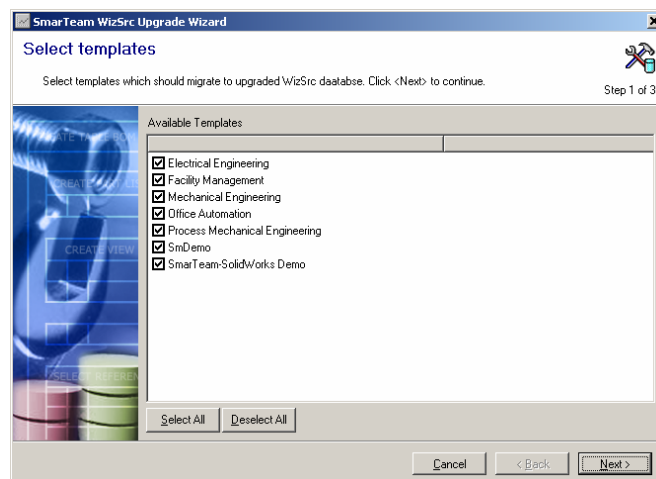
WizSrc Upgrade

This section needs to be performed for both Test & Production Environments.

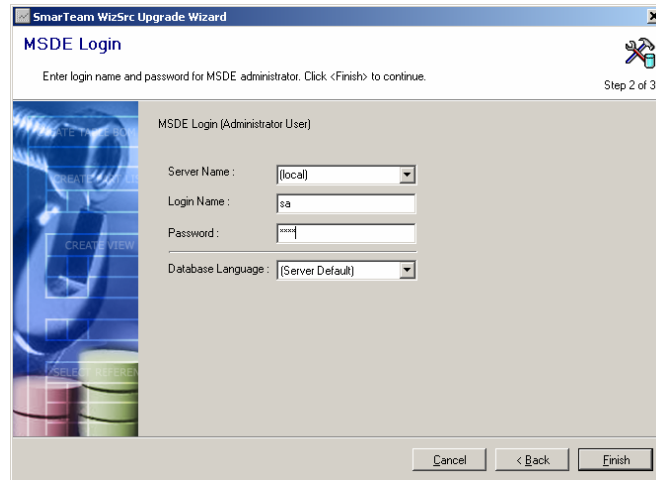
The WizSrc upgrade tool upgrades the user’s WizSrc database located on the SMARTEAM database server. The V5R16 Data Model Designer cannot be used without executing this tool. While upgrading, users' custom templates can be saved to the upgraded database. It is highly recommended to backup the current WizSrc database before running this tool.

To upgrade WizSrc:

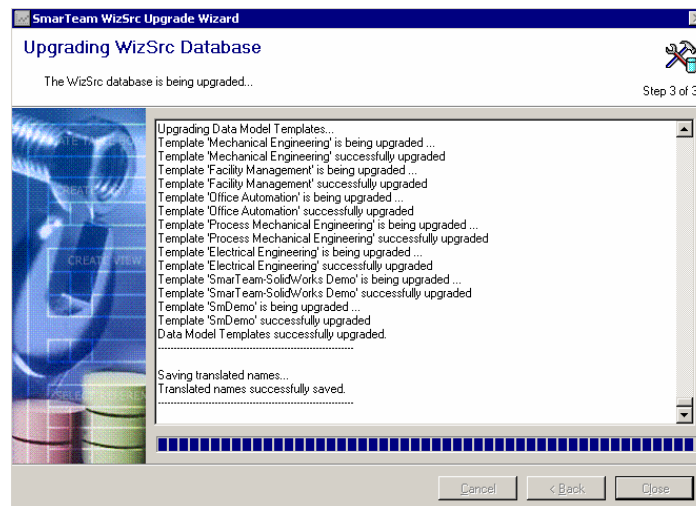
1. Run SmarTeamWizSrcUpgradeWizard.exe, located under the <SMARTEAM>\Upgrade directory.
2. In the Select Templates window select the templates that you want to upgrade for V5R16. Any template that you do not select cannot be used in V5R16. Then click **Next**.



3. In the MSDE Login window:
 - Enter the local MSDE Server Name, User (Login) Name and Password of the administrator of this MSDE server.
 - Click **Finish** to start the WizSrc upgrade process.



4. The Summary window is generated to indicate that the WizSrc upgrade process is completed.



Running the Data Model Designer Utility

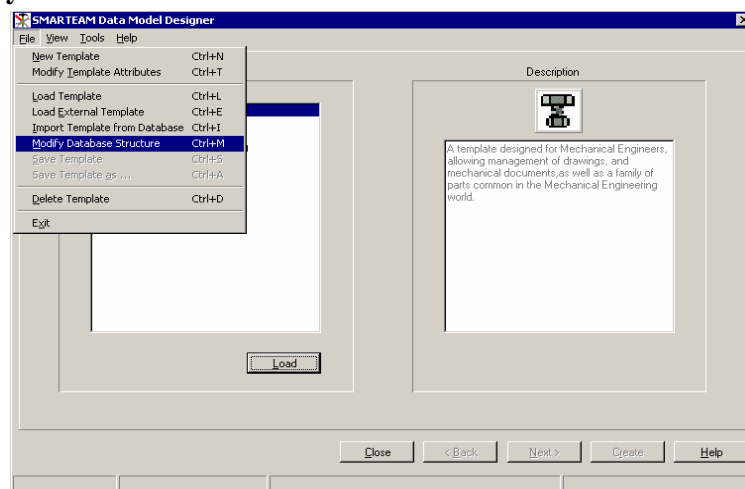
This section needs to be performed for both Test & Production Environments.

When you run the SMARTEAM Data Model Designer utility you will enable the new V5R16 additional functionalities.

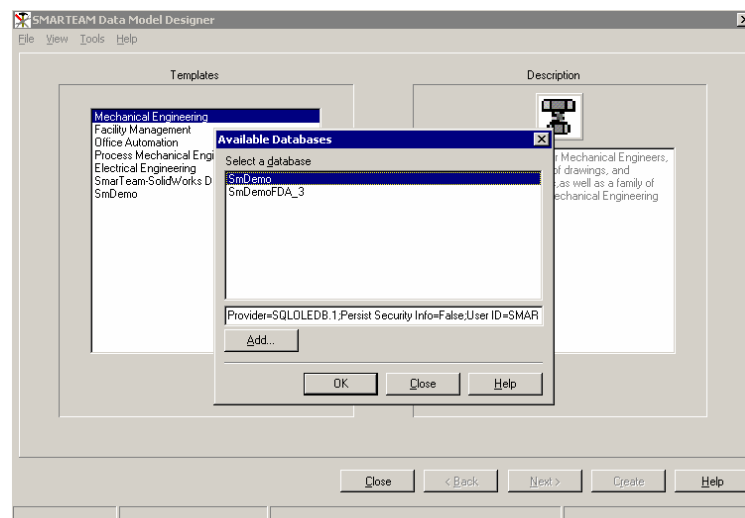
Note: Before running the SMARTEAM Data Model Designer Utility backup your database.

To run the SMARTEAM Data Model Designer utility perform the following steps:

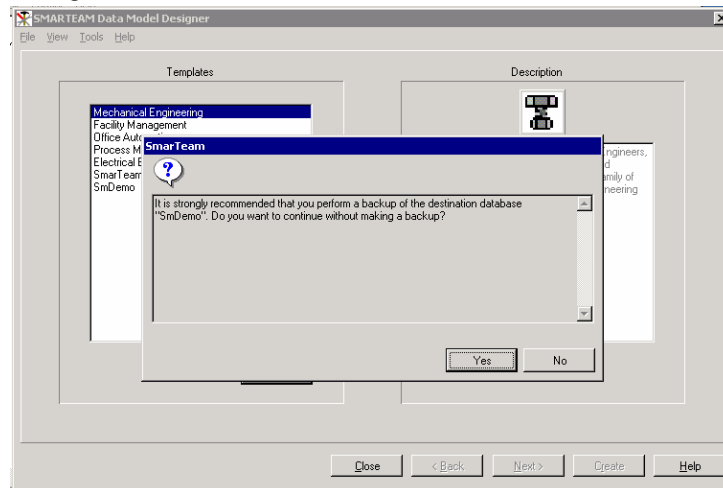
1. Open the SMARTEAM Data Model Designer utility, select **File** menu and then **Modify Database Structure**.



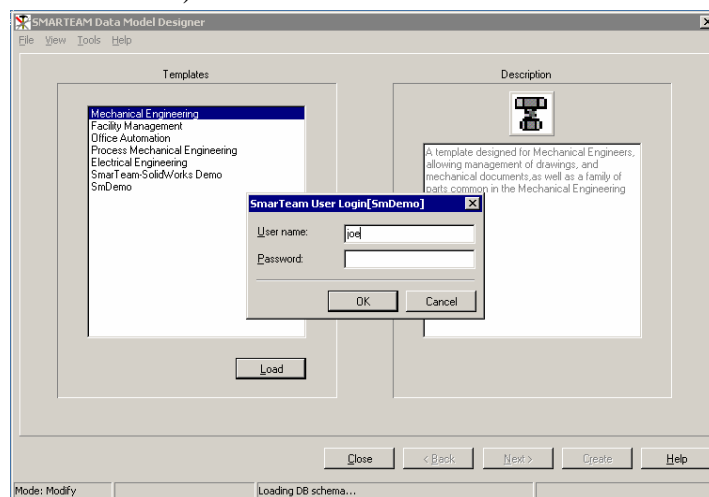
2. In the Available Databases window select the Database that needs to be upgraded and click **OK**.



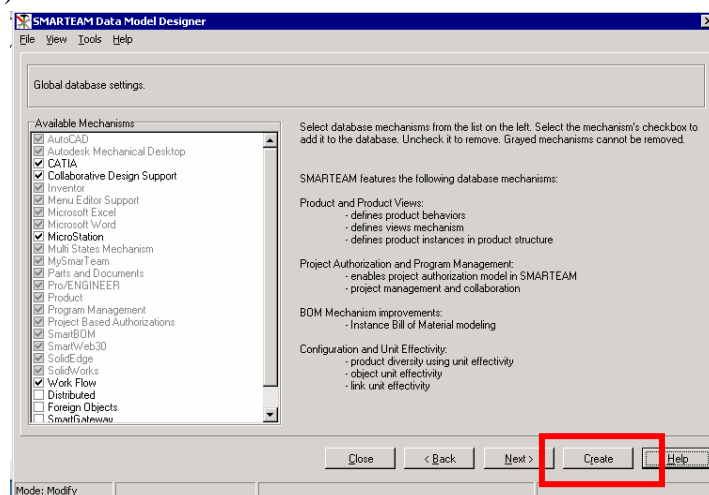
3. In the message window click **Yes**.



4. It will take few moments until the login window will appear. Enter your login (which must be Administrator) and click **OK**.



5. In the SMARTEAM Data Model Designer window wait until the database structure has been downloaded (may take a few minutes) and then click **Create**. This operation will automatically add all modifications required for V5R16 (this may also take a few minutes).



Upgrade Web Servers

As every Web Server has SMARTEAM – Editor installed on it, before starting any upgrade procedure on the Web Server, you must reset IIS before the SMARTEAM – Editor Upgrade process.

Before upgrading the Web Applications verify that your Hardware & Software meet the requirements. Refer to the V5R16 Hardware and Software Requirements Guide for further details. In addition, you must perform the SMARTEAM – Editor upgrade process on the Web Server before you start the Web Application upgrade process.

SMARTEAM – Web Editor & SMARTEAM – Navigator

SMARTEAM – Web Navigator will be automatically upgraded during the SMARTEAM – Web Editor upgrade process.

To upgrade SMARTEAM – Web Editor:

1. Run the installation process as is described in the SMARTEAM – Web Editor Installation Guide (the prerequisites and post installation are not required unless specified otherwise in this document). The following steps will not be available during the upgrade process:
 - SMARTEAM System Requirements Window
 - SMARTEAM Web Viewer Window
 - Web Server Selection
2. At the end of the SMARTEAM – Web Editor Installation process, activate the SMARTEAM – Web Editor Data Model Wizard.
3. Update SMARTEAM Database via SMARTEAM – Web Editor Data Model Wizard. For further information refer to the SMARTEAM – Web Editor Installation Guide.
4. If you have customized the Style sheets files (.CSS), which are used to store some user interface settings of previous SMARTEAM – Web Editor Versions, you need to redefine them in V5R16.

Note: After upgrading to V5R16, verify that the `smarteam.std.dynamicTypeMappings.config.xml` file does not exist in [SMARTEAM HOME]\ConfigurationSettings\Data\Domain. If it exists you must delete it.

SMARTEAM – Community Workspace

In order to upgrade the SMARTEAM – Community Workspace, insert the SMARTEAM Web Applications CD. Run the SMARTEAM – Community Workspace installation process as described in the SMARTEAM – Community Workspace Installation Guide (prerequisites and post installation are not required).

Once you have completed the SMARTEAM – Community Workspace Installation process, run the Synchronize Assembly Helper utility installation process, which is available on the same CD.

Upgrade all Client Machines

This section needs to be performed only for the Production Environment.

Products can be upgraded directly, once the minimal version requirements are met, regardless of any Service Packs and/or hot fixes that were subsequently installed.

SMARTEAM – BOM

In order to upgrade SMARTEAM – BOM, insert the SMARTEAM – BOM CD. Run the SMARTEAM – BOM installation process as described in the SMARTEAM – BOM Installation Guide (prerequisites and post installation are not required).

SMARTEAM – FDA Compliance

Before beginning the SMARTEAM – FDA Compliance upgrade process, make sure that all prerequisite products are already upgraded to V5R16. For example, SMARTEAM – FDA Compliance V5R16 requires SMARTEAM – Editor, SMARTEAM – Workflow and SMARTEAM – BOM, all in this same version.

In order to upgrade SMARTEAM – FDA Compliance, insert the SMARTEAM – FDA Compliance CD. Run the SMARTEAM – FDA Compliance installation process as described in the SMARTEAM – FDA Compliance Installation Guide (prerequisites and post installation are not required).

CHAPTER 4: STANDALONE UPGRADE PROCESS

This Upgrade Process is only suitable for Standalone (demonstration environment), when a single, Standalone Upgrade Machine is used for the entire upgrade process.

If both SMARTEAM – Foundation and SMARTEAM – Editor are installed on one machine, you must upgrade SMARTEAM – Foundation services (Vault / Workflow services) first and then upgrade SMARTEAM – Editor (includes SMARTEAM Integrations). When upgrading SMARTEAM – Editor, the installation process identifies the existing installed integrations as well as other components, and automatically upgrades them to V5R16.

If you originally installed SMARTEAM – Editor in Standalone mode on each client machine, the V5R16 installation will upgrade to the same mode, which includes the V5R16 Core Services. Therefore, in production environment, it is recommended to uninstall first the original Editor installation and then to proceed with V5R16 installation on each ‘clean’ machine.

This table contains a brief summary of the migration activities required in the Demonstration Environment. It also includes links to the detailed explanation of each activity, which are provided later in this document.

You must complete all the stages in the order listed in this table to successfully upgrade to SMARTEAM V5R16 on a Standalone Machine.

| Upgrade Stage | Activities Required |
|---------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Core Services Upgrade | Install SMARTEAM – Editor V5R16 in Standalone mode including Core Services (Session Management Service and System Configuration Service), and all SMARTEAM Administrator tools. Install the latest Service Pack of SMARTEAM – Editor V5R16. |
| Preparation of the V5R16 Upgrade | Install SmartDBUpgradeV5R16, which is provided with the latest SMARTEAM V5R16 Service Pack, in order to have the upgrade tools for WizSrc upgrade. |
| WizSrc Upgrade | Conduct an upgrade of the WizSrc database copy to V5R16 using the SmartTeamWizSrcUpgradeWizard tool. |
| Running the Data Model Designer Utility | Perform “Create” on this database using SMARTEAM Data Model designer as described above. |