Manual upgrade - YSoft SafeQ 4 CML to YSoft SafeQ 5 CML

March 17, 2014

TABLE OF CONTENTS

DOCUMENT DESCRIPTION

Migration to SafeQ 5 is supported only for SafeQ 4 SR34. Please update your version before migration.

1 YSOFT SAFEQ 4 CML WITH MSSQL DATABASE

Environment: Ysoft SafeQ 4 SR34 is running, master node

1.1 SAFEQ4

1. Write down GUID of the master CML node
2. Stop all SafeQ4 services (both CML and ORS)
3. Backup SQDB4 and SQDB4_SQDW databases
4. Backup SafeQ4 files and folders:
    a. c:\SafeQ4\conf
    b. c:\SafeQ4\server\spool (if you want to keep jobs)
    c. c:\SafeQ4\server\update (if you want to keep custom FW update files)
    d. c:\SafeQ4\ds\Conf\config.ini
    e. c:\SafeQ4\tomcat\conf\server.xml
5. Uninstall SafeQ4

1.2 SAFEQ5

1. Install SafeQ5 with the same GUID which was used for SafeQ4
2. Stop all SafeQ5 services
3. Delete SQDB5 and SQDB5_SQDW databases - check "Close existing connections" option before proceeding
4. Restore SQDB4, SQDB4_SQDW as SQDB5, SQDB5_SQDW from backup files
    a. Databases -> Restore Database... -> To database: SQDB5 -> From device: choose backup file -> tick Restore and finish the wizard
    b. Repeat similar procedure for SQDB5_SQDW
5. Run migration scripts on SQDB5 database (mssql_migration_scripts):
    a. 01_drop_columns.sql
    b. 02_migrate_pricelists.sql
    c. 03_update_terminals.sql
    d. 04_migrate_users_8.sql
        i. ***If you use a different name for SQDB5_SQDW database, update the script correspondingly (all "update SQDB5_SQDW.dbo.*" records)***
    e. 05_migrate_globalauth.sql
6. Update table cluster_server if necessary

7. Restore configuration files regarding backup:
    a. Copy rools.drl file from SafeQ4 backup into SafeQ5 (overwrite existing one)
    b. If you want to keep jobs, copy content from SafeQ4 spool folder into SafeQ5
    c. If you want to keep custom FW update files, copy content from SafeQ update folder into SafeQ5
    d. Verify terminalserver configuration and update it regarding c:\SafeQ4\ds\Conf\config.ini **if needed**
        i. in c:\SafeQ5\terminalserver\\TerminalServer.exe.config - change "networkAddress" if needed
        ii. in c:\SafeQ5\terminalserver\WebServer.config - change bindings if needed
    e. Verify configuration of tomcat and update it regarding c:\SafeQ4\tomcat\conf\server.xml **if needed**
        i. in c:\SafeQ5\tomcat\conf\server.xml - change settings if needed
8. Start SafeQ5, check DB validation
9. Verify scan to script settings (paths might be wrong after upgrade to SafeQ5)
10. Verify global authentication properties in SafeQ5 system settings - make sure that the default administrator login/password suits your needs and change it if needed.
    a. Go to **System > System settings** and search for **global-authentication-**
11. **Reinstall SafeQ embedded terminals on all printers**
    a. Note: Support of embedded terminal types was unified in SafeQ5. Terminal type will be automatically migrated to proper type by migration scripts.

2 YSOFT SAFEQ 4 CML WITH POSTGRESQL DATABASE

Environment: Ysoft SafeQ 4 is running, master node

2.1 SAFEQ4

1. Write down GUID of the master CML node
2. Stop all SafeQ4 services (both CML and ORS)
3. Backup SQDB4 and SQDB4_SQDW databases (choose Format TAR + appropriate file names, leave rest of options in default state)
4. Backup SafeQ4 files and folders:
    a. c:\SafeQ4\conf
    b. c:\SafeQ4\server\spool (if you want to keep jobs)
    c. c:\SafeQ4\server\update (if you want to keep custom FW update files)
    d. c:\SafeQ4\ds\Conf\config.ini
    e. c:\SafeQ4\tomcat\conf\server.xml
5. Uninstall SafeQ4

2.2 SAFEQ5

1. Install SafeQ5 with the same GUID which was used for SafeQ4
2. Stop all SafeQ5 services
3. Drop SQDB5 and SQDB5_SQDW databases
4. Create new empty SQDB5 and SQDB5_SQDW databases
5. Restore SQDB4, SQDB4_SQDW as SQDB5, SQDB5_SQDW - ignore errors and returned exit code - close the dialog using X button
6. Run script on SQDB5_SQDW database (pgsql_migration_scripts):
    a. 02_drop_dblink_func.sql

7. Run migration scripts on SQDB5 database:
    a. 01_mig4_5_rmv_obj.sql
    b. 02_drop_dblink_func.sql
    c. 03_mig4_5_prc_lsts.sql
    d. 04_mig4_5_trm_mng.sql
    e. 05_mig4_5_usrs.sql
        i. **this script must be run with following parameters in defined order:**
            1. **hostname: i.e. '127.0.0.1'**
            2. **port: i.e. '5433'**
            3. **name of DB with datawarehouse: i.e. 'SQDB5_SQDW'**
            4. **user: i.e. 'postgres'**
            5. **password: i.e. 'your_password'**
        ii. **or into the script body following lines must be placed:**
            1. **i_host = '127.0.0.1';**
            2. **i_port = '5433';**
            3. **i_dbname = 'SQDB5_SQDW';**
            4. **i_user = 'postgres';**
            5. **i_pwd = 'your_password';**
    f. 06_mig4_5_globalauth.sql
8. Update table cluster_server if necessary
9. Restore configuration files regarding backup:
    a. Copy rools.drl file from SafeQ4 backup into SafeQ5 (overwrite existing one)
    b. If you want to keep jobs, copy content from SafeQ4 spool folder into SafeQ5
    c. If you want to keep custom FW update files, copy content from SafeQ update folder into SafeQ5
    d. Verify terminalserver configuration and update it regarding c:\SafeQ4\ds\Conf\config.ini **if needed**
        i. in c:\SafeQ5\terminalserver\\TerminalServer.exe.config - change "networkAddress" if needed
        ii. in c:\SafeQ5\terminalserver\WebServer.config - change bindings if needed
    e. Verify configuration of tomcat and update it regarding c:\SafeQ4\tomcat\conf\server.xml **if needed**
        i. in c:\SafeQ5\tomcat\conf\server.xml - change settings if needed
10. Start SafeQ5, check DB validation
11. Verify scan to script settings (paths might be wrong after upgrade to SafeQ5)
12. Verify global authentication properties in SafeQ5 system settings - make sure that the default administrator login/password suits your needs and change it if needed.
    a. Go to **System > System settings** and search for **global-authentication-**
13. **Reinstall SafeQ embedded terminals on all printers**
    a. Note: Support of embedded terminal types was unified in SafeQ5. Terminal type will be automatically migrated to proper type by migration scripts.