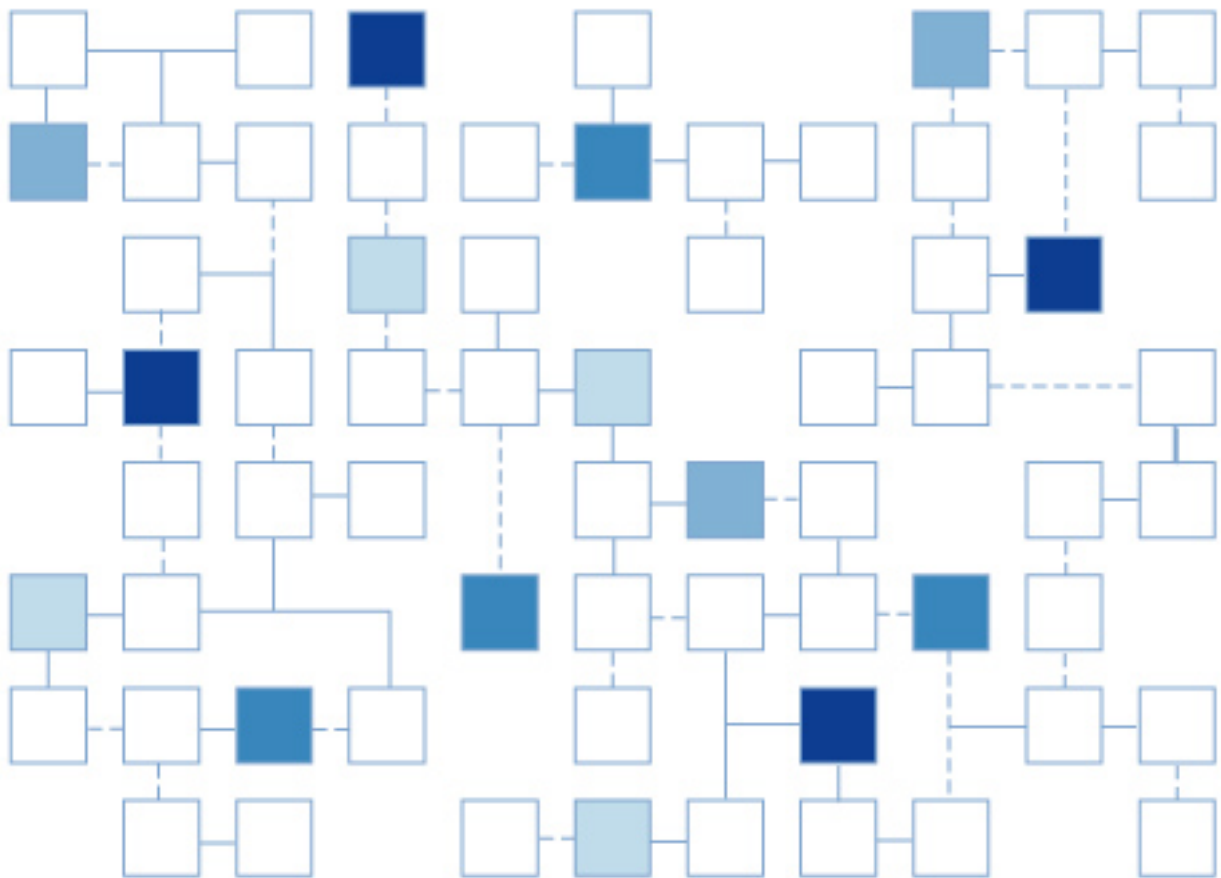


ExtraView Upgrade Guide

Version 4.2.2





Sesame Technology
269 Mount Hermon Road, Suite 100
Scotts Valley, CA 95066

Telephone: (831) 461-7100
Fax: (831) 461-7104
E-mail: info@sesame.com
www.sesame.com
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UPGRADE SUPPORT

If you have questions, you may contact Sesame Technology in one of the following ways:

Telephone (831) 461-7100. 7:00 a. m. to 5:00 p. m. PST Monday to Friday. Support for ExtraView is available outside of these hours by arrangement with Sesame Technology. If your Agreement with Sesame Technology gives you access to 24 x 7 support, you will be given a different telephone number for out-of-business-hours support.

Email support@sesame.com

Web Sesame's web site www.sesame.com
ExtraView support site support.extraview.net

Fax (831) 461-7104

Mail 269 Mount Hermon Road, Suite 100
Scotts Valley, CA 95066

INTRODUCTION

This documentation covers the procedures to upgrade your current version of ExtraView on Solaris, Windows and Linux platforms. This manual will lead you through many of the design decisions that will help you size the appropriate hardware, and install supporting web and application servers. It is assumed that the reader of this manual is familiar with the following topics:

- Installation and configuration of your operating system software, whether it be Windows, Solaris or Linux
- Installation and configuration of Oracle database
- Functionality and operation of Apache web server software
- Functionality and operation of Tomcat application server software
- Installation and functionality of the Java Runtime Environment
- Installation and functionality of an ANSI C compiler such as the GNU C Compiler
- Installation and functionality of the SUDO facility (if required for your installation)
- Functionality of the Perl programming language (if you intend to use the ExtraView Command Line Interface)

With regard to these topics, this guide will give you only the key elements of settings essential to ExtraView.

Although the guide offers significant assistance in installing and configuring many of the server and database components that support ExtraView, it is not intended that it replace the installation and configuration documentation of these components.

Sesame's consulting team is available to provide assistance with any of these items. Please refer to the Support section of this manual for information on how to contact Sesame.

UPGRADE INSTRUCTIONS

Tomcat/Oracle/Unix

Step 1: Upgrading the ExtraView Support Software

Your original installation of ExtraView uses java 1.3.1_07, however ExtraView 4.2 takes advantage of new features in the latest version of Java, and therefore we need to upgrade to java 1.4.

If you are upgrading from a 4.2.x version of ExtraView and have already upgraded to this version of Java, you can skip directly to Step 2 now.

Please follow the instructions below to install this version of java, and to change your Tomcat and BatchMail scripts to use this new version.

```
# BASE=/usr/local/extraview ** replace with your local base dir
# export BASE
```

Your BASE dir is the folder under which can be found your installations of tomcat, java, apache, perl etc.

INSTALLATION OF JAVA 2 JRE

```
Linux:
# cd $INSTALL/jre
# cp j2re-1_4_1_05-linux-i586.bin $BASE
# cd $BASE
# chmod +x j2re-1_4_1_05-linux-i586.bin
# ./j2re-1_4_1_05-linux-i586.bin
# rm j2re-1_4_1_05-linux-i586.bin

Solaris:
# cd $INSTALL/jre
# cp j2re-1_4_1_05-solaris-sparc.sh $BASE
# cd $BASE
# chmod +x j2re-1_4_1_05-solaris-sparc.sh
# ./j2re-1_4_1_05-solaris-sparc.sh
# rm j2re-1_4_1_05-solaris-sparc.sh
```

**** The JRE is now installed in \$BASE/jre1.4.1_05

For convenience, you can create a softlink to the new version of java

```
# cd $BASE
# rm java (if you already have a softlink to jre1.3.1_07)
# ln -s $BASE/jre1.4.1_05 $BASE/java
```

TOMCAT CONFIGURATION

To configure tomcat need to edit 4 files

```
startup.sh
shutdown.sh
tomcat.sh
wrapper.properties
```

The files are located in

```
# cd $BASE/jakarta-tomcat-3.3/bin
```

Modify the line that begins with:

```
JAVA_HOME=
```

Change the path to point to your new installation of java 1.4

```
JAVA_HOME=<Path to Base>/jre1.4.1_05
```

Now we need to edit the java home in the wrapper.properties file located in

```
# cd $BASE/jakarta-tomcat-3.3/conf/jk
```

Edit the line that begins with wrapper.java_home to point to your new java 1.4 installation:

```
wrapper.java_home=/usr/local/extraview/jre1.4.1_05
```

Now, we need to ensure that you have the minimum amount of RAM needed by the Java 1.4 jvm

```
# cd $BASE/jakarta-tomcat-3.3/bin
```

Now ensure that you have the following set in your `startup.sh` and `tomcat.sh`

```
TOMCAT_OPTS=-server' -Xms96m -Xmx128m -Djava.awt.headless=true'
```

- Xms is the minimum RAM allocated to tomcat: 96megs
- Xmx is the maximum RAM allocated to tomcat: 128megs
- server makes tomcat run as a server – more efficient
- Djava.awt.headless=true is used for charting

You can tweak these RAM values depending on the resources of your machine - we don't recommend that you go any lower than these values, however.

BATCHMAIL CONFIGURATION

In the scripts folder of your BatchMail installation (usually /usr/local/extraview/BatchMail/scripts) locate

```
startMail
```

Edit this file and set the

```
JAVA_JVM=/usr/local/extraview/java/bin/java
```

line to point to your new installation of java.

Once you have finished these steps, stop and restart the tomcat server (tomcat/bin/shutdown.sh, tomcat/bin/startup.sh) and test to make sure that the current version of ExtraView is still working properly - this way you know that the support software is installed correctly.

Although ExtraView 4.0.3 will not work in a production environment on java 1.4, it will work for testing, so that you can check that the support software is working correctly before proceeding.

Step 2: Upgrading the ExtraView Web Application

The ExtraView web application is generally installed under

```
/usr/local/extraview/tomcat/webapps
```

We suggest that your ExtraView application be installed in a folder called `evj` under this webapps folder. This will make your ExtraView application default URL

```
http://yourserver.yourdomain.com/evj/ExtraView
```

although, you can change your web server settings later as well to have

```
http://yourserver.yourdomain.com
```

point directly to ExtraView

Once you have located your application folder under webapps, please rename this folder so that it is not overwritten in the next step.

```
# mv evj evj_old
```

As part of the upgrade package, you will have received a tar file labeled `evj42xx-xxx.tar`. Copy the tar file to your webapps folder, and untar the file.

```
# tar xvf evj42xx-xxx.tar
```

Rename the evj42x-xxx folder to evj.

```
# mv evj42xx-xxx evj
```

Now you need to copy over the files from your existing application that are specific to your installation:

```
# cp evj_old/images/CompanyLogo.gif evj/images
# cp evj_old/images/CompanyLogo.gif evj/images_small
# cp -rf evj_old/WEB-INF/user_templates evj/WEB-INF
```

If you have custom Javascript code that was written either by Sesame Technology, or by your developers, you should add any of your custom methods in the `evj_old/javascript/user_javascript/UserJavascript.js` file to the new file in `evj/javascript/user_javascript`. (If you have questions about this step, please contact support@sesame.com)

You may or may not have files in the `user_javascript` and `user_templates` folders, depending on your initial installation.

CONFIGURATION.PROPERTIES

As part of the upgrade process we have provided a new `configuration.properties` file which you will need to edit for your specific installation.

Edit

```
evj/WEB-INF/configuration/Configuration.properties
```

Replace the placeholder values with your local values:

```
DB_HOST      = db.yourdomain.com
DB_SID       = evdb
DB_USER      = myuser
DB_PASSWORD  = mypassword
DB_URL       =
jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(HOST=db.yourdomain.com)(PROTOCOL=tcp)(PORT=1521))(CONNECT_DATA=(SID=evdb )))
```

*the jdbc:oracle line is one line – not two (word wrap!)

Replace `db.yourdomain.com` with your Database server name or IP address (in 2 places).

Replace `evdb` with your Database SID (in 2 places).

Replace `myuser` with your Database Username.

Replace `mypassword` with your Database Password for the above username.

At this point, you can compare your

```
evj_old/WEB-INF/configuration/Configuration.properties
```

with this file to determine if you have made any other changes within the Configuration file that you wish to maintain. In particular, look for any LDAP or SSO fields that you may be using.

Also note that we have two new properties

```
CHART_DIR
USER_TEMPLATE_DIR
```

These have default values, but you may set them to more appropriate values – as long as the user account which starts the Tomcat process has read/write access to the folders you choose.

There are also several lines relating to the ConnectionPool settings – if your existing settings are higher than the defaults, or if you have changed your settings to appropriate numbers for your system, you should migrate the old settings into the new `Configuration.properties` file.

USERCUSTOM UPGRADE

We have provided you with a new version of your UserCustom class file compiled to work with 4.2. Please take the `userCustom.tar` file and untar it under

```
/usr/local/extraview/tomcat/webapps/evj/WEB-INF
```

this will create a folder called `classes` under `evj/WEB-INF`, inside which is the following structure:

```
/classes/com/extraview/usercustom/UserCustom.class
```

You may also see a different file in this folder:

```
/classes/com/extraview/usercustom/YOURCOMPANYUserCustom.class
```

This is also correct.

Step 3: Upgrading the ExtraView database

****** BACK UP YOUR DATABASE BEFORE PERFORMING THIS STEP ******

We strongly suggest that you take a full export of your database before running any upgrade scripts against it. This will allow you to roll back to the previous version of ExtraView if there are any problems arising from the upgrade.

Instructions on doing Oracle imports and exports are at the end of this document.

Once you have done this, you will need to collect two pieces of information before proceeding. First, go to the Tomcat bin folder:

```
# cd /usr/local/extraview/tomcat/bin
```

Edit or read the contents of the `tomcat.sh` file, and copy the following two lines from the top of this file to your clipboard or write down the paths so that you can use the values in a moment:

```
JAVA_HOME=/usr/local/extraview/j2re1_4_1_05
TOMCAT_HOME=/usr/local/extraview/tomcat
```

If your current version of ExtraView is 4.0.3.x:

Edit the following file:

```
/usr/local/extraview/tomcat/webapps/evj/WEB-INF/data/403upgrade_run42Patches.sh
```

Replace the following lines:

```
JAVA_HOME=/usr/local/extraview/java
TOMCAT_HOME=/usr/local/extraview/tomcat
```

Now save and exit this file.

To upgrade the database, please now run

```
# sh 403upgrade_run42Patches.sh evj
```

where "evj" is the folder under `/usr/local/extraview/tomcat/webapps` that contains the 4.2 ExtraView application.

If your current version of ExtraView is 4.2.x:

Edit the following file:

```
/usr/local/extraview/tomcat/webapps/evj/WEB-INF/data/run42Patches.sh
```

Replace the following lines:

```
JAVA_HOME=/usr/local/extraview/java
TOMCAT_HOME=/usr/local/extraview/tomcat
```

Now save and exit this file.

To upgrade the database, please now run

```
# sh run42Patches.sh evj
```

where "evj" is the folder under `/usr/local/extraview/tomcat/webapps` that contains the 4.2 ExtraView application.

You should see many lines of text scroll past on the screen, while the patches are applied to your system. At some point, depending on the amount of data in your system, the

patches may appear to “hang” while it performs large operations on the database – please allow a reasonable amount of time (possibly up to 20 minutes or so) before you assume the upgrade has failed. If you have any questions, please contact Sesame Technology.

Once the script has finished running, and you are returned back to a command prompt, your upgrade is complete.

For your reference, if you have any questions, there is a log of the changes made to the database in `/tomcat/webapps/evj/WEB-INF/logs` in a `.log` file.

Step 4: Upgrading the CLI

If you do not use the ExtraView command line interface, you can skip this step. This section assumes that you are upgrading the CLI. If you are installing it for the first time, please refer to the *‘ExtraView Installation and Configuration’* guide for full instructions.

Copy the `evapi_unix.tar` file from

```
/usr/local/extraview/tomcat/webapps/evj/WEB-INF/data
```

to your local ExtraView installation of perl (usually `/usr/local/extraview/perl`)

You should have a folder called `evapi`. Rename that folder to `evapi_old` and create a new `evapi` folder. Move `evapi_unix.tar` into this folder and untar it.

```
# mv evapi_unix.tar evapi
# cd evapi
# tar xvf evapi_unix.tar
```

Now edit `evconfig.txt`. If you do not use `evmail`, you only need to set one configuration setting -

```
SERVER          = extraview.yourdomain.com/evj/ExtraView
```

Set this to point to your specific URL used to access ExtraView.

If you do use `evmail`, please note that there have been some changes to the regular expressions used to parse the subject line - you can copy the lines from your existing `evconfig.txt` in `evapi_old`, but please note that if you have changed the default subject `REGEX`, you will need to make that change again to the new configuration setting `EVMAIL_ID_REGEX`. If you have any questions, please email support@sesame.com

Now you can make the perl commands executable:

```
# chmod +x ev* manifest.pl
```

You need to change the first line of each perl command to point to your current installation of perl for ExtraView. Use the following command, replacing `$PERL_HOME` with the location of your ExtraView perl installation:

```
$PERL_HOME/bin/perl -p -i -e "s#/usr/local/bin/perl#$PERL_HOME/bin/perl#" ev*
manifest.pl
```

Step 5: Restarting ExtraView

Now that you have finished the upgrade, you need to stop and restart tomcat and apache before logging in to ExtraView 4.2

Now, you will need to stop and restart Apache:

```
# cd /usr/local/extraview/apache/bin
# ./apachectl restart (as root or using sudo)
```

If you have Apache with SSL installed:

```
# ./apachectl stop
# ./apachectl startssl
```

Now you will need to stop and restart the tomcat servlet engine to load the new version of ExtraView

```
# cd /usr/local/extraview/tomcat/bin
# ./shutdown.sh
# ./startup.sh
```

You should now be able to log in to ExtraView and be running version 4.2

Step 6: Patching the Oracle Database

If you are running Oracle Database 8.1.7 on a release earlier than 8.1.7.4, or Oracle Database 9.0.1 on a release earlier than 9.0.1.4, you should patch your oracle installation. If you have access to Oracle Metalink, you should download the patch set from there. If not, your Sesame contact will provide you with connect information to the ev_support ftp account on our ftp server. Navigate to ev_support_software/<your operating system>/database and download the appropriate file. There are detailed instructions in the README file. If you have any questions, please contact Sesame at support@sesame.com.

If you are running Oracle Database 8i and wish to migrate your database to 9i, it is strongly recommended that you go to 9.2, since 9.0 is desupported by Oracle. As this is supported, but not required by ExtraView 4.2, that procedure is not included in these instructions. Please contact Sesame for details on migrating to Oracle 9i.

Tomcat/Oracle/Windows

Step 1: Upgrading the ExtraView Support Software

Your original installation of ExtraView uses java 1.3.1_07, however ExtraView 4.2 takes advantage of new features in the latest version of Java, and therefore we need to upgrade to java 1.4

If you are upgrading from a 4.2.x version of ExtraView and have already upgraded to this version of Java, you can skip directly to Step 2 now.

Please follow the instructions below to install this version of java, and to change your Tomcat and BatchMail scripts to use this new version.

INSTALLATION OF JAVA 2 JRE

The following steps will install Java jre 1.4

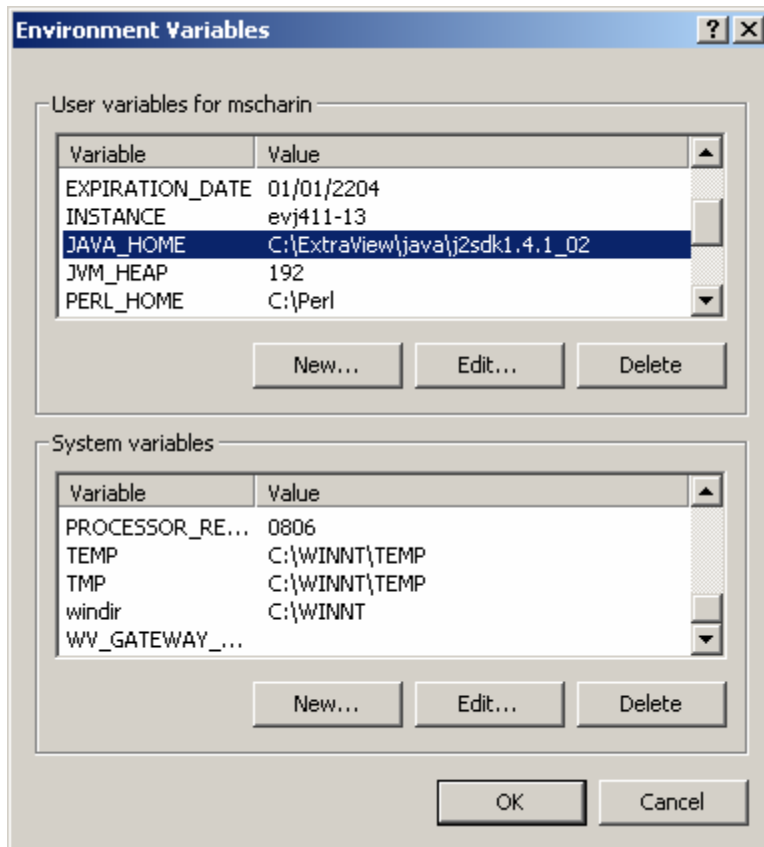
Double click on `j2re-1_4_1_05-windows-i586.exe`

Install to:

`D:\ExtraView\java\j2re1.4.1_05` (Note: no spaces!)

Java JRE is now installed in the directory `D:\ExtraView\java\j2re1.4.1_05`.

Now set the environment variable **JAVA_HOME** to `D:\ExtraView\java\j2re1.4.1_05`, or the path to where you installed the jdk in the step above.



TOMCAT CONFIGURATION

The following steps will set memory parameters for Tomcat and configure it to run with the correct java.

```
navigate to D:\ExtraView\jakarta-tomcat-3.3\bin
```

Edit

```
startup.bat and shutdown.bat and tomcat.bat
```

Edit the following line in the above files to point to your new installation of java

```
SET JAVA_HOME= D:/ExtraView/java/j2re1.4.1_05
```

Now we need to edit the java home in the `wrapper.properties` file located in

```
D:\ExtraView\jakarta-tomcat-4.1.27\conf\jk
```

Edit the line that begins with `wrapper.java_home` to point to your new java 1.4 installation:

```
wrapper.java_home= D:/ExtraView/java/j2re1.4.1_05
```

Now, we need to ensure that you have the minimum amount of RAM needed by the Java 1.4 jvm

```
# cd $BASE/jakarta-tomcat-3.3/bin
```

Now ensure that you have the following set in your `startup.sh` and `tomcat.sh`

```
TOMCAT_OPTS=-server' -Xrs -Xms96m -Xmx128m'
```

- Xms is the minimum RAM allocated to tomcat: 96megs
- Xmx is the maximum RAM allocated to tomcat: 128megs
- Xrs prevents tomcat from being shut down if the Windows user logs off
- server makes tomcat run as a server – more efficient

You can tweak these RAM values depending on the resources of your machine - we don't recommend that you go any lower than these values, however.

BATCHMAIL CONFIGURATION

In the scripts folder of your BatchMail installation (usually `D:\ExtraView\BatchMail\scripts`) locate

```
runBatchMail.bat
```

Edit this file and set the

```
JAVA_HOME= D:/ExtraView/java/j2re1.4.1_05
```

line to point to your new installation of java.

If you are using BatchMail as a Windows Service, you will need to remove the service, and re-create it once you have changed the java home.

In your BatchMail/scripts folder, you should have two files:

```
ExtraViewBatchMail.exe  
installExtraViewBatchMail.bat
```

go to a dos prompt and run the following command:

```
ExtraViewBatchMail -uninstall ExtraViewBatchMail
```

Edit `installBatchMailService.bat` and follow the instructions at the top of this file to put in the correct values for your new java JVM dll file

Double click on the file `installBatchMailService.bat`

Once you have finished these steps, stop and restart the tomcat server (tomcat/bin/shutdown.bat, tomcat/bin/startup.bat or restart the ApacheTomcat service) and test to make sure that the current version of ExtraView is still working properly - this way you know that the support software is installed correctly.

Although ExtraView 4.0.3 will not work in a production environment on java 1.4, it will work for testing, so that you can check that the support software is working correctly before proceeding.

Step 2: Upgrading the ExtraView Web Application

The ExtraView web application is generally installed under

```
D:\ExtraView\jakarta-tomcat-3.3\webapps
```

We suggest that your ExtraView application be installed in a folder called `evj` under this webapps folder. This will make your ExtraView application default URL

<http://yourserver.yourdomain.com/evj/ExtraView>

although, you can change your web server settings later as well to have

<http://yourserver.yourdomain.com>

point directly to ExtraView

Once you have located your application folder under webapps, please rename this folder so that it is not overwritten in the next step.

As part of the upgrade package, you will have received a zip file labeled `evj42xx-xxx.tar`. Copy the zip file to your webapps folder, and unzip the file.

Rename the `evj42xx-xxx` folder to `evj`.

Now you need to copy over the files from your existing application that are specific to your installation:

```
copy file    evj_old\images\CompanyLogo.gif to evj\images
copy file    evj_old\images\CompanyLogo.gif to evj\images_small
copy folder  evj_old\WEB-INF\user_templates to evj\WEB-INF
```

If you have custom Javascript code that was written either by Sesame Technology, or by your developers, you should add any of your custom methods in the `evj_old/javascript/user_javascript/UserJavascript.js` file to the new file in `evj/javascript/user_javascript`. (If you have questions about this step, please contact support@sesame.com)

You may or may not have files in the `user_javascript` and `user_templates` folders, depending on your initial installation.

CONFIGURATION.PROPERTIES

As part of the upgrade process we have provided a new `configuration.properties` file which you will need to edit for your specific installation.

Edit

```
Evj\WEB-INF\configuration\Configuration.properties
```

Replace the placeholder values with your local values:

```
DB_HOST      = db.yourdomain.com
DB_SID       = evdb
DB_USER      = myuser
DB_PASSWORD  = mypassword
DB_URL       =
jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(HOST=db.yourdomain.com)(PROTOCOL=tcp)(PORT=1521))(CONNECT_DATA=(SID=evdb )))
```

*the `jdbc:oracle` line is one line – not two (word wrap!)

Replace `db.yourdomain.com` with your Database server name or IP address (in 2 places).

Replace `evdb` with your Database SID (in 2 places).

Replace `myuser` with your Database Username.

Replace `mypassword` with your Database Password for the above username.

At this point, you can compare your

```
evj_old\WEB-INF\configuration\Configuration.properties
```

with this file to determine if you have made any other changes within the Configuration file that you wish to maintain. In particular, look for any LDAP or SSO fields that you may be using.

Also note that we have two new properties

```
CHART_DIR
USER_TEMPLATE_DIR
```

These have default values, but you will need to set them to more appropriate values – as long as the user account which starts the Tomcat process has read/write access to the folders you choose.

There are also several lines relating to the ConnectionPool settings – if your existing settings are higher than the defaults, or if you have changed your settings to appropriate numbers for your system, you should migrate the old settings into the new `Configuration.properties` file.

USERCUSTOM UPGRADE

We have provided you with a new version of your UserCustom class file compiled to work with 4.2. Please take the `UserCustom.zip` file and unzip it under

```
D:\ExtraView\jakarta-tomcat-3.3\webapps\evj\WEB-INF
```

this will create a folder called `classes` under `evj/WEB-INF`, inside which is the following structure:

```
\classes\com\extraview\usercustom\UserCustom.class
```

You may also see a new file in this folder:

```
\classes\com\extraview\usercustom\YOURCOMPANYUserCustom.class
```

This is also correct.

Step 3: Upgrading the ExtraView database

```
**** BACK UP YOUR DATABASE BEFORE PERFORMING THIS STEP ****
```

We strongly suggest that you take a full export of your database before running any upgrade scripts against it. This will allow you to roll back to the previous version of ExtraView if there are any problems arising from the upgrade.

Instructions on doing Oracle imports and exports are at the end of this document.

Once you have done this, you will need to collect two pieces of information before proceeding. First, go to the Tomcat bin folder:

```
D:\ExtraView\jakarta-tomcat-3.3\bin
```

Edit or read the contents of the `tomcat.sh` file, and copy the following two lines from the top of this file to your clipboard or write down the paths so that you can use the values in a moment:

```
JAVA_HOME =D:\ExtraView\j2re1_4_1_05  
TOMCAT_HOME =D:\ExtraView\jakarta-tomcat-3.3
```

If your current version of ExtraView is 4.0.3.x:

Now, edit the following file `403upgrade_run42Patches.bat` in

```
D:\ExtraView\jakarta-tomcat-3.3\webapps\evj\WEB-INF\data\
```

Replace the following lines:

```
JAVA_HOME =D:\ExtraView\j2re1_4_1_05
TOMCAT_HOME =D:\ExtraView\jakarta-tomcat-3.3
```

Now save and exit this file.

Now edit run42Windows.bat

The line that looks like:

```
403upgrade_run42Patches.bat D:\ExtraView\j2re1.4.1_05 D:\ApacheGroup\jakarta-
tomcat-3.3.1a D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj
```

replace D:\ExtraView\j2re1.4.1_05 with your path to your java.

replace D:\ApacheGroup\jakarta-tomcat-3.3.1a with your path to your tomcat

replace D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj with your path to your evj folder

If your current version of ExtraView is 4.2.x:

Now, edit the following file `run42Patches.bat` in

```
D:\ExtraView\jakarta-tomcat-3.3\webapps\evj\WEB-INF\data\
```

Replace the following lines:

```
JAVA_HOME =D:\ExtraView\j2re1_4_1_05  
TOMCAT_HOME =D:\ExtraView\jakarta-tomcat-3.3
```

Now save and exit this file.

Now edit `run42Windows.bat`

The line that looks like:

```
403upgrade_run42Patches.bat D:\ExtraView\j2re1.4.1_05 D:\ApacheGroup\jakarta-  
tomcat-3.3.1a D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj
```

```
replace 403upgrade_run42Patches.bat with run42Patches  
replace D:\ExtraView\j2re1.4.1_05 with your path to your java.  
replace D:\ApacheGroup\jakarta-tomcat-3.3.1a with your path to your tomcat  
replace D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj with your path to your evj  
folder
```

To upgrade the database, please now run `run42Windows.bat` from a dos window so that you can monitor the progress of the upgrade.

You should see many lines of text scroll past on the screen, while the patches are applied to your system. At some point, depending on the amount of data in your system, the patches may appear to “hang” while it performs large operations on the database – please allow a reasonable amount of time (possibly up to 20 minutes or so) before you assume the upgrade has failed. If you have any questions, please contact Sesame Technology.

Once the script has finished running, and you are returned back to a command prompt, your upgrade is complete.

For your reference, if you have any questions, there is a log of the changes made to the database in `\tomcat\webapps\evj\WEB-INF\logs` in a `.log` file.

Step 4: Upgrading the CLI

If you do not use the ExtraView command line interface, you can skip this step. This section assumes that you are upgrading the CLI. If you are installing it for the first time, please refer to the ‘ExtraView Installation and Configuration’ guide for full instructions.

Copy the `evapi_windows.zip` file from

```
D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj\WEB-INF\data
```

to your local ExtraView installation of perl (usually `D:\extraview\perl`)

You should have a folder called `evapi`. Rename that folder to `evapi_old` and create a new `evapi` folder. Move `evapi_windows.zip` into this folder and unzip it.

Now edit `evconfig.txt`. If you do not use `evmail`, you only need to set one configuration setting -

```
SERVER          = extraview.yourdomain.com/evj/ExtraView
```

Set this to point to your specific URL used to access ExtraView.

If you do use `evmail`, please note that there have been some changes to the regular expressions used to parse the subject line - you can copy the lines from your existing `evconfig.txt` in `evapi_old`, but please note that if you have changed the default subject `REGEX`, you will need to make that change again to the new configuration setting `EVMAIL_ID_REGEX`. If you have any questions, please email support@sesame.com

Step 5: Restarting ExtraView

Now that you have finished the upgrade, you need to stop and restart tomcat and apache before logging in to ExtraView 4.2. You can do this by stopping and restarting the Apache and ApacheTomcat services from your Windows Services console.

You should now be able to log in to ExtraView and be running version 4.2

Step 6: Patching the Oracle Database

If you are running Oracle Database 8.1.7 on a release earlier than 8.1.7.4, or Oracle Database 9.0.1 on a release earlier than 9.0.1.4, you should patch your oracle installation. If you have access to Oracle Metalink, you should download the patch set from there. If not, your Sesame contact will provide you with connect information to the `ev_support` ftp account on our ftp server. Navigate to `ev_support_software/<your operating system>/database` and download the appropriate file. There are detailed instructions in the README file. If you have any questions, please contact Sesame at support@sesame.com.

If you are running Oracle Database 8i and wish to migrate your database to 9i, it is strongly recommended that you go to 9.2, since 9.0 is desupported by Oracle. As this is supported, but not required by ExtraView 4.2, that procedure is not included in these instructions. Please contact Sesame for details on migrating to Oracle 9i.

Tomcat/MSSQL/Windows

Step 1: Upgrading the ExtraView Support Software

Your original installation of ExtraView uses java 1.3.1_07, however ExtraView 4.2 takes advantage of new features in the latest version of Java, and therefore we need to upgrade to java 1.4

If you are upgrading from a 4.2.x version of ExtraView and have already upgraded to this version of Java, you can skip directly to Step 2 now.

Please follow the instructions below to install this version of java, and to change your Tomcat and BatchMail scripts to use this new version.

INSTALLATION OF JAVA 2 JRE

The following steps will install Java jre 1.4

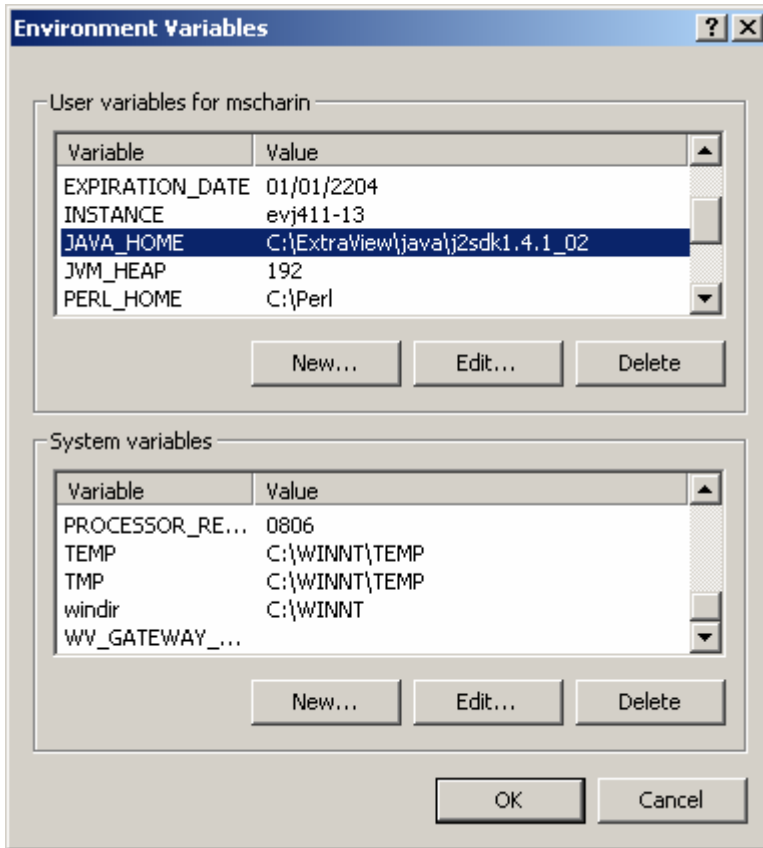
`Double click on j2re-1_4_1_05-windows-i586.exe`

Install to:

`D:\ExtraView\java\j2re1.4.1_05` (Note: no spaces!)

Java JRE is now installed in the directory D:\ExtraView\java\j2re1.4.1_05.

Now set the environment variable JAVA_HOME to D:\ExtraView\java\j2re1.4.1_05, or the path to where you installed the jdk in the step above.



TOMCAT CONFIGURATION

The following steps will set memory parameters for Tomcat and configure it to run with the correct java.

```
navigate to D:\ExtraView\jakarta-tomcat-3.3\bin
```

Edit

```
startup.bat and shutdown.bat and tomcat.bat
```

Edit the following line in the above files to point to your new installation of java

```
SET JAVA_HOME= D:/ExtraView/java/j2re1.4.1_05
```

Now we need to edit the java home in the `wrapper.properties` file located in

```
D:\ExtraView\jakarta-tomcat-4.1.27\conf\jk
```

Edit the line that begins with `wrapper.java_home` to point to your new java 1.4 installation:

```
wrapper.java_home= D:/ExtraView/java/j2re1.4.1_05
```

Now, we need to ensure that you have the minimum amount of RAM needed by the Java 1.4 jvm

```
# cd $BASE/jakarta-tomcat-3.3/bin
```

Now ensure that you have the following set in your `startup.sh` and `tomcat.sh`

```
TOMCAT_OPTS=-server' -Xms96m -Xmx128m'
```

-Xms is the minimum RAM allocated to tomcat: 96megs
-Xmx is the maximum RAM allocated to tomcat: 128megs
-server makes tomcat run as a server – more efficient

You can tweak these RAM values depending on the resources of your machine - we don't recommend that you go any lower than these values, however.

BATCHMAIL CONFIGURATION

In the scripts folder of your BatchMail installation (usually `D:\ExtraView\BatchMail\scripts`) locate

```
runBatchMail.bat
```

Edit this file and set the

```
JAVA_HOME= D:/ExtraView/java/j2re1.4.1_05
```

line to point to your new installation of java.

If you are using BatchMail as a Windows Service, you will need to remove the service, and re-create it once you have changed the java home.

In your BatchMail/scripts folder, you should have two files:

```
ExtraViewBatchMail.exe  
installExtraViewBatchMail.bat
```

go to a dos prompt and run the following command:

```
ExtraViewBatchMail -uninstall ExtraViewBatchMail
```

Edit `installBatchMailService.bat` and follow the instructions at the top of this file to put in the correct values for your new java JVM dll file

Double click on the file `installBatchMailService.bat`

Once you have finished these steps, stop and restart the tomcat server (tomcat/bin/shutdown.bat, tomcat/bin/startup.bat or restart the ApacheTomcat service) and test to make sure that the current version of ExtraView is still working properly - this way you know that the support software is installed correctly.

Although ExtraView 4.0.3 will not work in a production environment on java 1.4, it will work for testing, so that you can check that the support software is working correctly before proceeding.

Step 2: Upgrading the ExtraView Web Application

The ExtraView web application is generally installed under

```
D:\ExtraView\jakarta-tomcat-3.3\webapps
```

We suggest that your ExtraView application be installed in a folder called `evj` under this webapps folder. This will make your ExtraView application default URL

<http://yourserver.yourdomain.com/evj/ExtraView>

although, you can change your web server settings later as well to have

<http://yourserver.yourdomain.com>

point directly to ExtraView

Once you have located your application folder under webapps, please rename this folder so that it is not overwritten in the next step.

As part of the upgrade package, you will have received a zip file labeled `evj42xx-xxx.tar`. Copy the zip file to your webapps folder, and unzip the file.

Rename the `evj42xx-xxx` folder to `evj`.

Now you need to copy over the files from your existing application that are specific to your installation:

```
copy file evj_old\images\CompanyLogo.gif to evj\images
copy file evj_old\images\CompanyLogo.gif to evj\images_small
copy folder evj_old\WEB-INF\user_templates to evj\WEB-INF
```

If you have custom Javascript code that was written either by Sesame Technology, or by your developers, you should add any of your custom methods in the `evj_old/javascript/user_javascript/UserJavascript.js` file to the new file in `evj/javascript/user_javascript`. (If you have questions about this step, please contact support@sesame.com)

You may or may not have files in the `user_javascript` and `user_templates` folders, depending on your initial installation.

Sesame Technology does not provide JDBC drivers for Sql Server – these were purchased separately by you. You will need to copy the driver files from the existing application to the new version. This file (or files) will be located in the `evj_old\WEB-INF\lib` folder. Many of our customers are using the i-net software Sprinta drivers, and the file is called `sprinta2000.jar`

CONFIGURATION.PROPERTIES

As part of the upgrade process we have provided a new `Configuration.properties` file which you will need to edit for your specific installation.

Edit

```
evj\WEB-INF\configuration\Configuration.properties
```

First, place a # mark in front of the following two lines to comment them out:

```
DB_URL      = jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(HOST=db.yourdomain.com)(PROTOCOL=tcp)(PORT=1521))(CONNECT_DATA=(SID=evdb)))
JDBCdriver  = oracle.jdbc.driver.OracleDriver
```

Now delete the # in front of the following two lines to make them active if you are using the Sprinta2000 JDBC driver.

```
#DB_URL      = jdbc:inetdae7://db.yourdomain.com: 1433/ev
#JDBCdriver= com.inet.tds.TdsDriver
```

If you are using a different JDBC driver than Sprinta2000, copy the equivalent lines from your `evj_old/WEB-INF/configuration/Configuration.properties` file into the new file

Now, put a # mark in front of this line to comment it out:

```
DBMS_INTERFACE = com.extraview.dbms.oracle.OracleDbms
```

And remove the # mark from in front of this line to activate it:

```
#DBMS_INTERFACE = com.extraview.dbms.mssql.MssqlDbms
```

Replace the placeholder values with your local values:

```
DB_HOST      = db.yourdomain.com
DB_SID       = evdb
DB_USER      = myuser
DB_PASSWORD  = mypassword
DB_URL       = jdbc:inetdae7://db.yourdomain.com: 1433/evdb
JDBCdriver= com.inet.tds.TdsDriver
```

Replace `db.yourdomain.com` with your Database server name or IP address (in 2 places).

Replace `evdb` with your Database SID (in 2 places).
Replace `myuser` with your Database Username.
Replace `mypassword` with your Database Password for the above username.

At this point, you can compare your

```
evj_old\WEB-INF\configuration\Configuration.properties
```

with this file to determine if you have made any other changes within the Configuration file that you wish to maintain. In particular, look for any LDAP or SSO fields that you may be using.

Also note that we have two new properties

```
CHART_DIR  
USER_TEMPLATE_DIR
```

These have default values, but you will need to set them to more appropriate values – as long as the user account which starts the Tomcat process has read/write access to the folders you choose.

There are also several lines relating to the ConnectionPool settings – if your existing settings are higher than the defaults, or if you have changed your settings to appropriate numbers for your system, you should migrate the old settings into the new `Configuration.properties` file.

Please note that if you purchased the limited connection version of the Sprinta2000 JDBC drivers, you should not exceed 20 connections as the maximum number of connections, or the driver will fail.

USERCUSTOM UPGRADE

We have provided you with a new version of your UserCustom class file compiled to work with 4.2. Please take the `UserCustom.zip` file and unzip it under

```
D:\ExtraView\jakarta-tomcat-3.3\webapps\evj\WEB-INF
```

this will create a folder called `classes` under `evj/WEB-INF`, inside which is the following structure:

```
\classes\com\extraview\usercustom\UserCustom.class
```

You may also see a different file in this folder:

```
\classes\com\extraview\usercustom\YOURCOMPANYUserCustom.class
```

This is also correct.

Step 3: Upgrading the ExtraView database

**** BACK UP YOUR DATABASE BEFORE PERFORMING THIS STEP ****

We strongly suggest that you take a full export of your database before running any upgrade scripts against it. This will allow you to roll back to the previous version of ExtraView if there are any problems arising from the upgrade.

Once you have done this, you will need to collect two pieces of information before proceeding. First, go to the Tomcat bin folder:

```
D:\ExtraView\jakarta-tomcat-3.3\bin
```

Edit or read the contents of the `tomcat.sh` file, and copy the following two lines from the top of this file to your clipboard or write down the paths so that you can use the values in a moment:

```
JAVA_HOME =D:\ExtraView\j2re1_4_1_05  
TOMCAT_HOME =D:\ExtraView\jakarta-tomcat-3.3
```

If your current version of ExtraView is 4.0.3.x:

Now, edit the following file `403upgrade_run42Patches.bat` in

```
D:\ExtraView\jakarta-tomcat-3.3\webapps\evj\WEB-INF\data\
```

Replace the following lines:

```
JAVA_HOME =D:\ExtraView\j2re1_4_1_05  
TOMCAT_HOME =D:\ExtraView\jakarta-tomcat-3.3
```

Now save and exit this file.

Now edit `run42Windows.bat`

The line that looks like:

```
403upgrade_run42Patches.bat D:\ExtraView\j2re1.4.1_05 D:\ApacheGroup\jakarta-  
tomcat-3.3.1a D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj
```

replace `D:\ExtraView\j2re1.4.1_05` with your path to your java.

replace `D:\ApacheGroup\jakarta-tomcat-3.3.1a` with your path to your tomcat

replace `D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj` with your path to your evj folder

If your current version of ExtraView is 4.2.x:

Now, edit the following file `run42Patches.bat` in

```
D:\ExtraView\jakarta-tomcat-3.3\webapps\evj\WEB-INF\data\
```

Replace the following lines:

```
JAVA_HOME =D:\ExtraView\j2re1_4_1_05  
TOMCAT_HOME =D:\ExtraView\jakarta-tomcat-3.3
```

Now save and exit this file.

Now edit `run42Windows.bat`

The line that looks like:

```
403upgrade_run42Patches.bat D:\ExtraView\j2re1.4.1_05 D:\ApacheGroup\jakarta-  
tomcat-3.3.1a D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj
```

```
replace 403upgrade_run42Patches.bat with run42Patches  
replace D:\ExtraView\j2re1.4.1_05 with your path to your java.  
replace D:\ApacheGroup\jakarta-tomcat-3.3.1a with your path to your tomcat  
replace D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj with your path to your evj  
folder
```

To upgrade the database, please now run `run42Windows.bat` from a dos window so that you can monitor the progress of the upgrade.

You should see many lines of text scroll past on the screen, while the patches are applied to your system. At some point, depending on the amount of data in your system, the patches may appear to “hang” while it performs large operations on the database – please allow a reasonable amount of time (possibly up to 20 minutes or so) before you assume the upgrade has failed. If you have any questions, please contact Sesame Technology.

Once the script has finished running, and you are returned back to a command prompt, your upgrade is complete.

For your reference, if you have any questions, there is a log of the changes made to the database in `\tomcat\webapps\evj\WEB-INF\logs` in a `.log` file.

Step 4: Upgrading the CLI

If you do not use the ExtraView command line interface, you can skip this step. This section assumes that you are upgrading the CLI. If you are installing it for the first time, please refer to the **‘ExtraView Installation and Configuration’** guide for full instructions.

Copy the `evapi_windows.zip` file from

```
D:\ApacheGroup\jakarta-tomcat-3.3.1a\webapps\evj\WEB-INF\data
```

to your local ExtraView installation of perl (usually `D:\extraview\perl`)

You should have a folder called `evapi`. Rename that folder to `evapi_old` and create a new `evapi` folder. Move `evapi_windows.zip` into this folder and unzip it.

Now edit `evconfig.txt`. If you do not use `evmail`, you only need to set one configuration setting -

```
SERVER          = extraview.yourdomain.com/evj/ExtraView
```

Set this to point to your specific URL used to access ExtraView.

If you do use `evmail`, please note that there have been some changes to the regular expressions used to parse the subject line - you can copy the lines from your existing `evconfig.txt` in `evapi_old`, but please note that if you have changed the default subject `REGEX`, you will need to make that change again to the new configuration setting `EVMAIL_ID_REGEX`. If you have any questions, please email support@sesame.com

Step 5: Restarting ExtraView

Now that you have finished the upgrade, you need to stop and restart tomcat and apache before logging in to ExtraView 4.2. You can do this by stopping and restarting the Apache and ApacheTomcat services from your Windows Services console.

You should now be able to log in to ExtraView and be running version 4.2

Weblogic/Oracle/Unix

Step 1: Upgrading the ExtraView Application

As part of the upgrade process we have provided a new `configuration.properties` file which you will need to edit for your specific installation.

In `evj421-74/WEB-INF/configuration/Configuration.properties` please replace the placeholder values with your local values:

```
DB_HOST      = db.yourdomain.com
DB_SID       = evdb
DB_USER      = myuser
DB_PASSWORD  = mypassword
DB_URL       =
jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(HOST=db.yourdomain.com)(PROTOCOL=
tcp)(PORT=1521))(CONNECT_DATA=(SID=evdb )))
```

Replace `db.yourdomain.com` with your Database server name or IP address **(in 2 places)**.

Replace `evdb` with your Database SID **(in 2 places)**.

Replace `myuser` with your Database Username.

Replace `mypassword` with your Database Password for the above username.

At this point, you can compare your `evj_old/WEB-INF/configuration/Configuration.properties` with this file to determine if you have made any other changes within the Configuration file that you wish to maintain.

Specifically - check your 4.1.0 version for values for

```
WEB_SERVER_NAME
```

Also, check that you bring over your existing Connection pool settings

```
ConnectionPoolSize
ConnectionPoolMax
ConnectionUseCount
ConnectionTimeout
ConnectionPoolTimeout
```

if your settings are lower than the new default settings.

Also, make sure that you bring over your LDAP/SSO settings if they are different than the ones in the default `Configuration.properties` template.

There are new configuration settings:

```
USER_TEMPLATE_DIR= user_templates
CHART_DIR = tmp
```

Please make sure that the ExtraView user account has read and write privileges to the `/tmp` folder, or change this to a new location in the Configuration.properties file.

We have provided a new version of the `weblogic.xml` file in this delivery - it is needed for Weblogic 8.1. It is located in `evj42x-xxx/WEB-INF`

USERCUSTOM UPGRADE

We have provided you with a new version of your UserCustom class file compiled to work with 4.2. There have been a number of changes made to allow the custom code to work in the 4.2 version, as well as improving the ease of upgrading in the future. The new file may be called `UserCustom.class` Or `YOURCOMPANYUserCustom.class`

Step 2: Upgrading the ExtraView Database

****** BACK UP YOUR DATABASE BEFORE PERFORMING THIS STEP ******

We strongly suggest that you take an export of your database before running any upgrade scripts against it. This will allow you to roll back to the previous version of ExtraView if there are any problems arising from the upgrade.

Instructions on doing Oracle imports and exports are at the end of this document.

Edit the following file:

```
evj421-74/WEB-INF/data/410upgrade_run42Patches.sh
```

Replace the following lines:

```
JAVA_HOME=/usr/local/extraview/java  
TOMCAT_HOME=/usr/local/bean/weblogic81/server/lib
```

Now save and exit this file.

To upgrade the database, please now run

```
# sh 410upgrade_run42Patches.sh evj42x-xxx
```

You should see many lines of text scroll past on the screen, while the patches are applied to your system.

Once the script has finished running, and you are returned back to a command prompt, your upgrade is complete.

Step 3: Upgrading the CLI

Copy the `evapi_unix.tar` file from `/usr/local/extraview/tomcat/webapps/evj/WEB-INF/data` to your local installation of perl (usually `/usr/local/extraview/perl`)

You should have a folder called `evapi`. Rename that folder to `evapi_old` and create a new `evapi` folder. Move `evapi_unix.tar` into this folder and untar it.

Now edit `evconfig.txt`. If you do not use `evmail`, you only need to set one configuration setting -

```
SERVER          = extraview.yourdomain.com/evj/ExtraView
```

Set this to point to your specific URL used to access ExtraView.

If you do use `evmail`, please note that there have been some changes to the regular expressions used to parse the subject line - you can copy the lines from your existing `evconfig.txt` in `evapi_old`, but please note that if you have changed the default subject `REGEX`, you will need to make that change again to the new configuration setting `EVMAIL_ID_REGEX`. If you have any questions, please email support@sesame.com

Now you can make the perl commands executable:

```
# chmod +x ev* manifest.pl
```

And now you need to change the first line of each perl command to point to your current installation of perl

Use the following command, replacing `$PERL_HOME` with the location of your ExtraView perl installation:

```
$PERL_HOME/bin/perl -p -i -e "s#/usr/local/bin/perl#$PERL_HOME/bin/perl#" ev*  
manifest.pl
```

Step 4: Restarting ExtraView

Now that you have finished the upgrade, you need to redeploy the `evj` web application in Weblogic before logging into ExtraView 4.2

Step 5: Patching the Oracle Database

If you are running Oracle Database 8.1.7 on a release earlier than 8.1.7.4, or Oracle Database 9.0.1 on a release earlier than 9.0.1.4, you should patch your oracle installation. If you have access to Oracle Metalink, you should download the patch set from there. If not, your Sesame contact will provide you with connect information to the `ev_support` ftp account on our ftp server. Navigate to `ev_support_software/<your operating system>/database` and download the appropriate file. There are detailed instructions in the README file. If you have any questions, please contact Sesame at support@sesame.com.

If you are running Oracle Database 8i and wish to migrate your database to 9i, it is strongly recommended that you go to 9.2, since 9.0 is desupported by Oracle. As this is

supported, but not required by ExtraView 4.2, that procedure is not included in these instructions. Please contact Sesame for details on migrating to Oracle 9i.

APPENDIX A

Oracle Database Import/Export Instructions

To export a .dmp file:

```
exp system/$PASSWORD@$ORACLE_SID file=XXX.dmp compress=n consistent=y owner=XXX
```

xxx with the name of the ExtraView database user
\$PASSWORD with your Oracle SYSTEM user password
\$ORACLE_SID with your ORACLE_SID value for the ExtraView database

to import a .dmp file:

```
imp system/$PASSWORD@$ORACLE_SID file=XXX.dmp fromuser=XXX touser=$NEW_SCHEMA commit=y
```

where you would replace:

xxx with the name of the .dmp file you received
\$PASSWORD with your Oracle SYSTEM user password
\$ORACLE_SID with your ORACLE_SID value for the ExtraView database
\$NEW_SCHEMA with the username/schema name of a new ExtraView (empty) schema

always ensure that you have the environment variable "NLS_LANG" set to `American_America.UTF8` prior to performing an import or an export

If you have any questions, or something is not clear, please contact Sesame Technology support@sesame.com