SteelTrace

SteelTrace™ Server 4.0 Upgrading Guide

Help Version 4.0, November 2005.

Upgrading from Catalyze Server 3.1 to SteelTrace Server 4.0

BEFORE UPGRADING YOU MUST OBTAIN A NEW LICENSE KEY.

E-mail **support@steeltrace.com** to obtain a new key.

Please skip this section if you do not have an existing installation of SteelTrace Server 3.1.

Please note that we have dropped the 'Catalyze' name for the 4.0 release, i.e. the 3.1 product 'Catalyze Server' has been rebranded to 'SteelTrace Server'.

SteelTrace Server 4.0 uses a different database structure to Catalyze Server 3.1. Your 3.1 data will automatically be migrated to 4.0 when the 4.0 Server is started.

The following instructions will help you through the full upgrade procedure from 3.1 to 4.0. Note that its not necessary to fully remove 3.1 before installing 4.0.
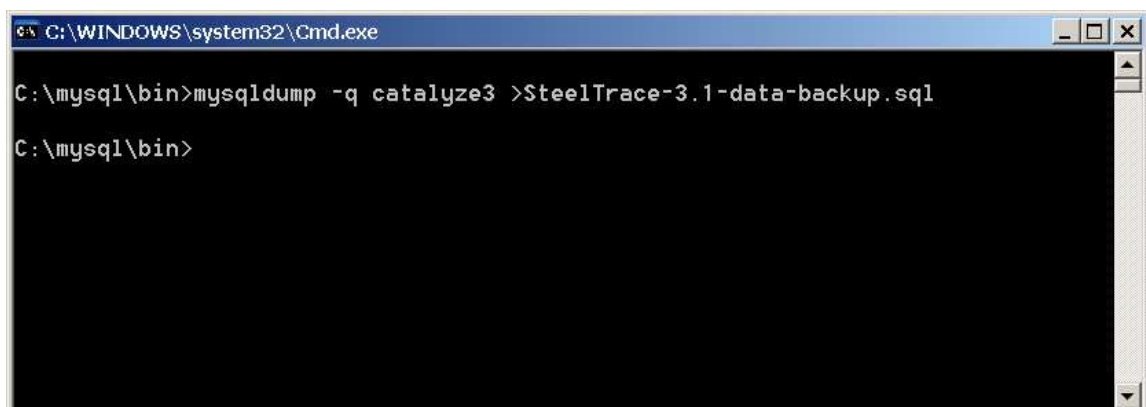
1.1 Backup your 3.1 data

It is vital that you backup your data before upgrading from 3.1 to 4.0. You need to backup your database and it is also good practice to take your important Projects 'offline' in Enterprise 3.1 and save them locally on your hard disk. It is important to backup your old data as it can take many hours to migrate your old SteelTrace data, which could be interrupted by machine or network errors during this time which will leave your data in a half migrated state.

1.1.1 Backing up your MySQL Database

To backup your MySQL 4.0/4.1 database:

- from a 'cmd' prompt, change directory to c:\mysql\bin (or wherever your MySQL is installed)

- type 'mysqldump -q catalyze3 > c:\temp\SteelTrace-3.1-data-backup.sql'.

This will create a backup file called 'SteelTrace-3.1-data-backup.sql' in your c:\temp\ directory. You may want to move this somewhere for safe keeping.

1.1.2 Backing up your Oracle 9i Database

Creating a backup of your Catalyze3 tablespace in Oracle is beyond the scope of this document, please contact your Oracle DBA.

Note: to avoid a potential problem with Oracle's 'OPEN_CURSORS' setting that you may encounter when migrating, it is best to set this Oracle setting now. To do this, change the value of OPEN_CURSORS to 20000 in the following files

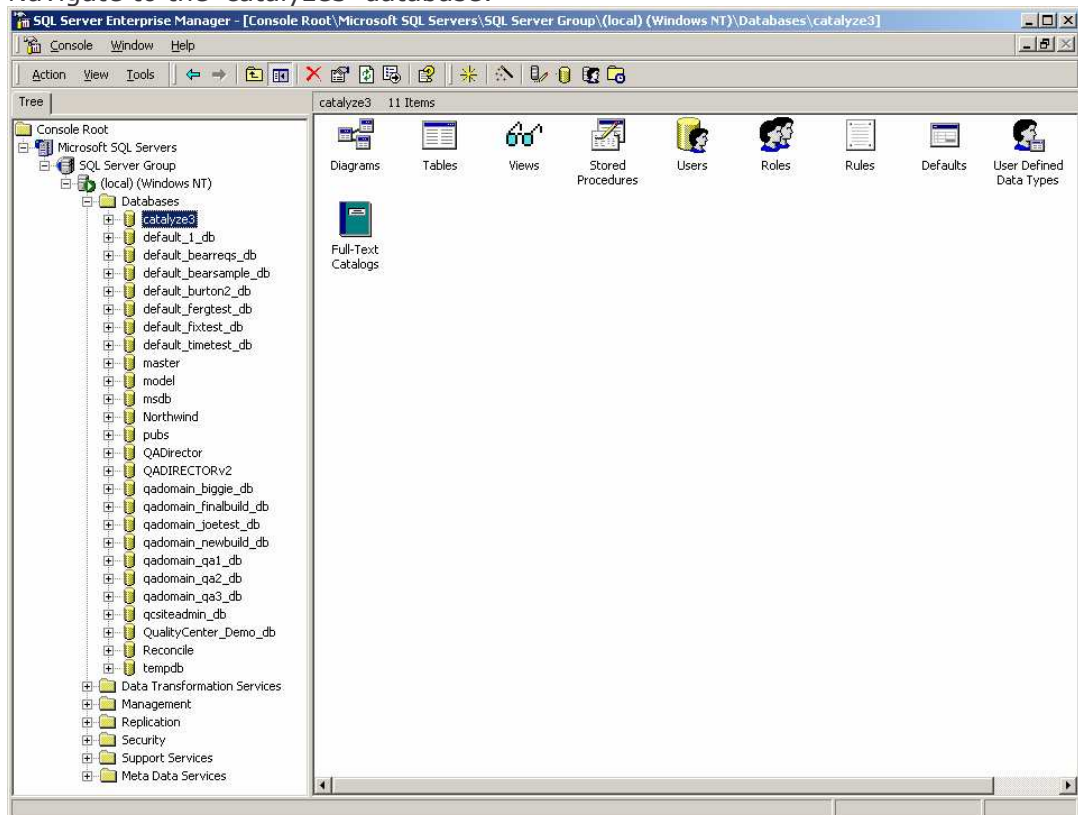 - init.ora in <oracle_install_dir>\admin\OEMREP\pfile

  - init.ora in <oracle_install_dir>\admin\Oracle\pfile

  - init.ora in <oracle_install_dir>\admin\prod\pfile

And then reboot the machine. For more information on this Oralce issue, see: http://www.praetoriate.com/oracle_tips_mamt_parameter_file.htm.

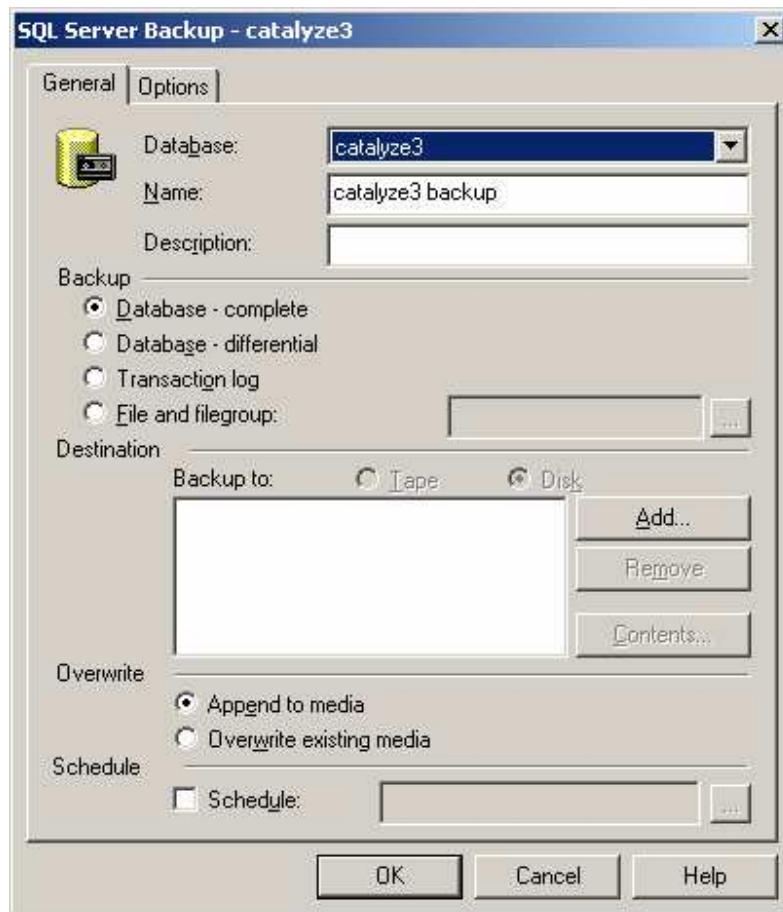## 1.1.3 Backing up your MSSqlServer 2000 Database

To backup your MSSqlServer database:

- Launch 'Enterprise Manager' from the 'Microsoft SQL Server' Start menu

- Navigate to the 'catalyze3' database:

- Select the 'Tools\Backup Database' menu option

- Modify the configuration as you see fit and then hit 'OK':

1.1.4 Taking Projects 'offline' in SteelTrace Enterprise 3.1 ('Catalyze')
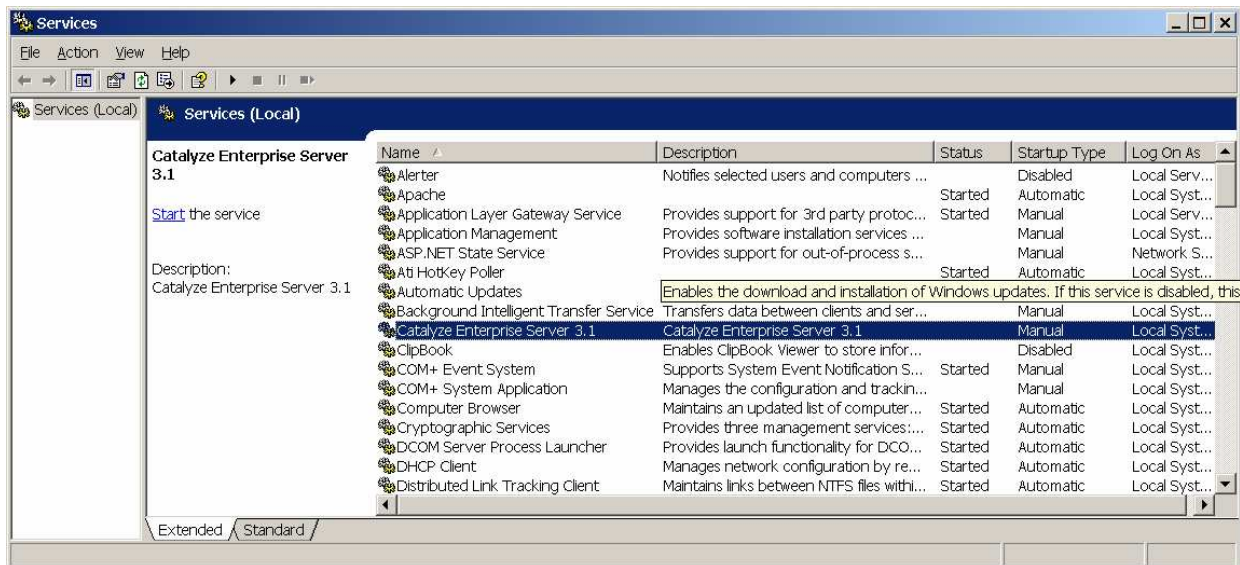
To take your important projects offline in 3.1, do the following:

- launch 'Catalyze Enterprise' from the 'SteelTrace\Catalyze Enterprise 3.1' Start menu.

- Open the remote Projects that you want to take offline

- Select the 'Project\Download Repository Project to Local Project' menu option (or hit the '⬚' button from the toolbar).

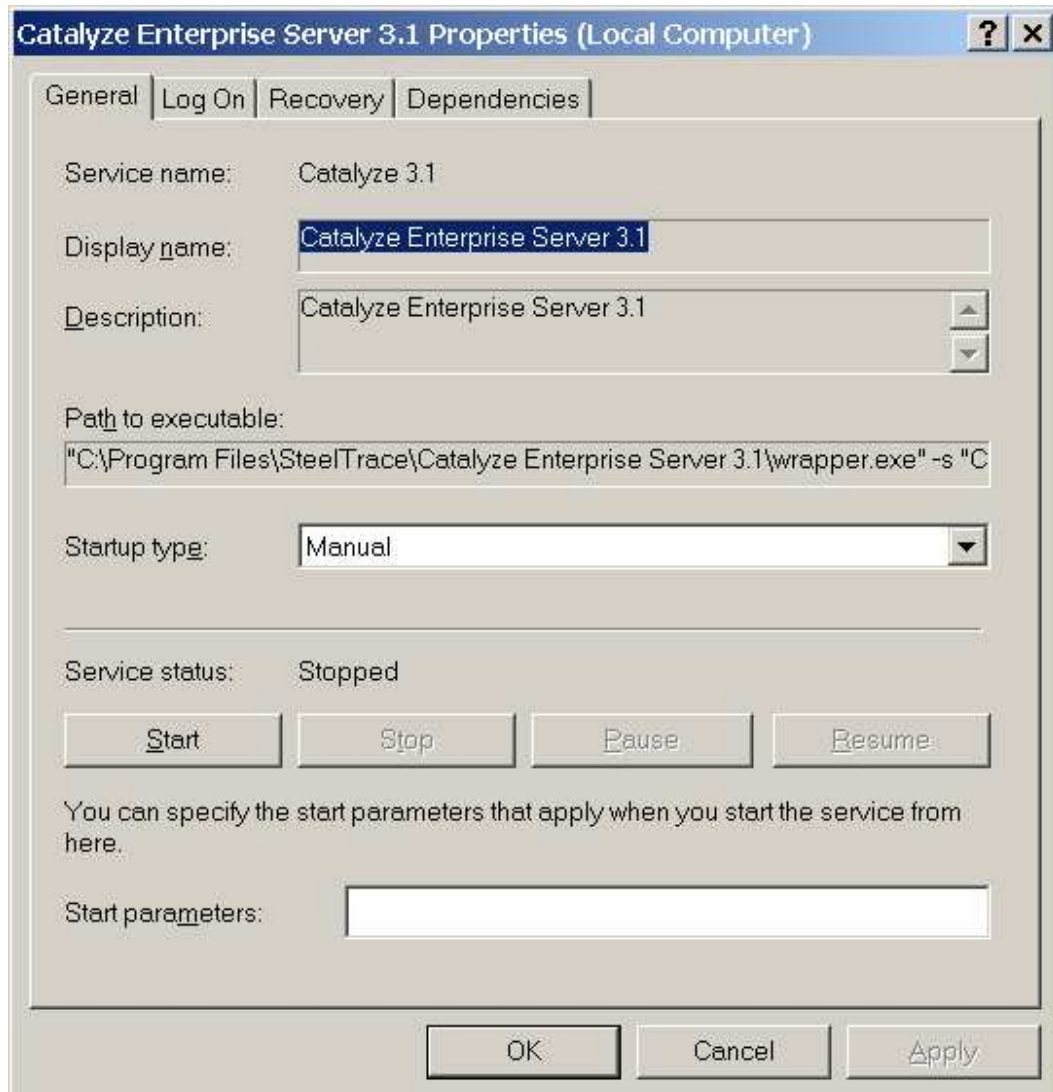- Enter a filename for the Project and hit save.

1.2   Stop the 3.1 Server

First stop the SteelTrace 'Catalyze Enterprise' 3.1 server. If the server is running from the GUI, simply hit the stop button. If your 3.1 server is running as a windows service, stop it as follows:

- open Control Panel and launch 'Administrative Tools' -> 'Services'

- navigate to 'Catalyze Enterprise Server 3.1':

- right click, and select 'Properties':

![SteelTrace logo]

- 'Stop' the service (if its running)
- Change the 'Startup type' to 'Manual'

1.3 Install SteelTrace Server 4.0

Install the SteelTrace Server 4.0:

- double click on 'SteelTrace_Server_Install.exe' to start the installation process:
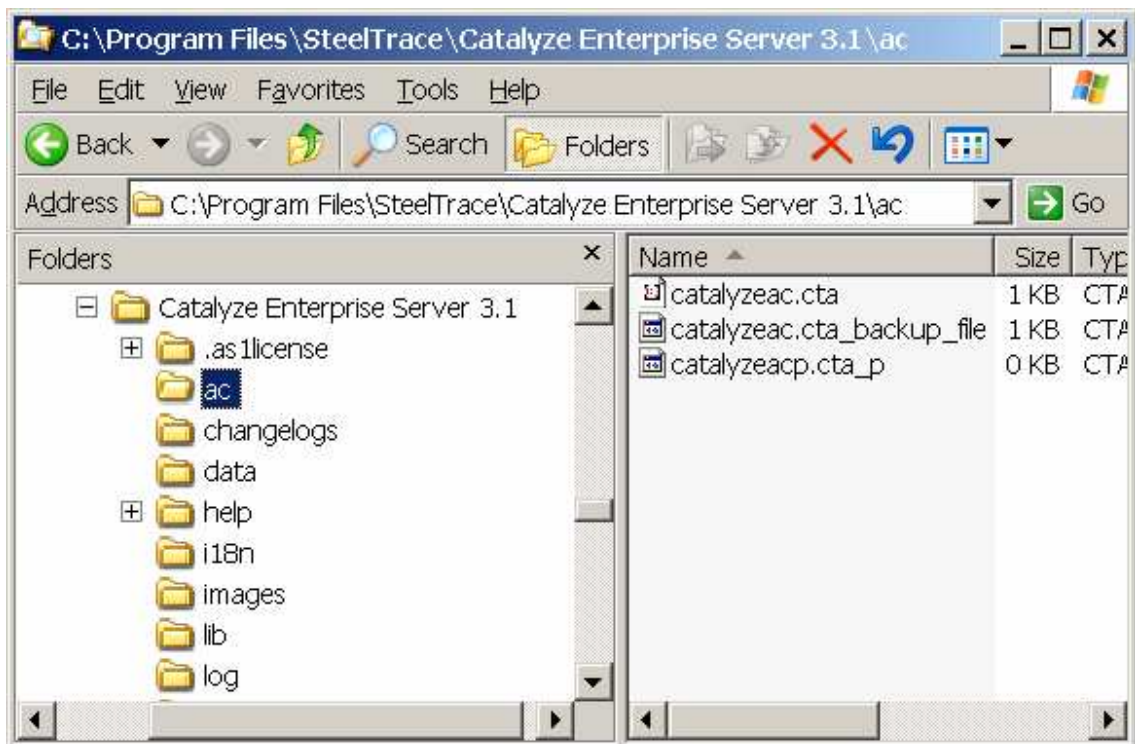
- follow the instructions by clicking the 'next' button, and finally click 'Finish' to install. The install should complete in a matter of minutes.
- Once the installation is complete, launch 'SteelTrace Server 4.0' from 'SteelTrace/SteelTrace Server 4.0' on the Start menu
- Enter the same configuration values in the new 4.0 server as you had specified in 3.0 and hit 'Apply'. **Note: do not hit 'Start' just yet**!

1.4 Copy Access Control files from 3.1 to 4.0

The Access Control files need to be manually copied from the SteelTrace 3.1 installation into the SteelTrace 4.0 installation. The Access Control files are used to control permissions and security settings in SteelTrace. To copy the files manually:

- launch file explorer

- navigate to your SteelTrace\Catalyze Enterprise Server 3.1\ac directory:

- copy the 'catalyzeac.cta' and 'catalyzeacp.cta_p' files (highlight the files and select the 'Edit/Copy' menu option)

- navigate to your SteelTrace\SteelTrace Server 4.0\ac directory:

- and paste the copied files (select the 'Edit/Paste' menu option)

1.5 Run SteelTrace Server 4.0

Its time to start our Server and migrate the data. Hit the start button:

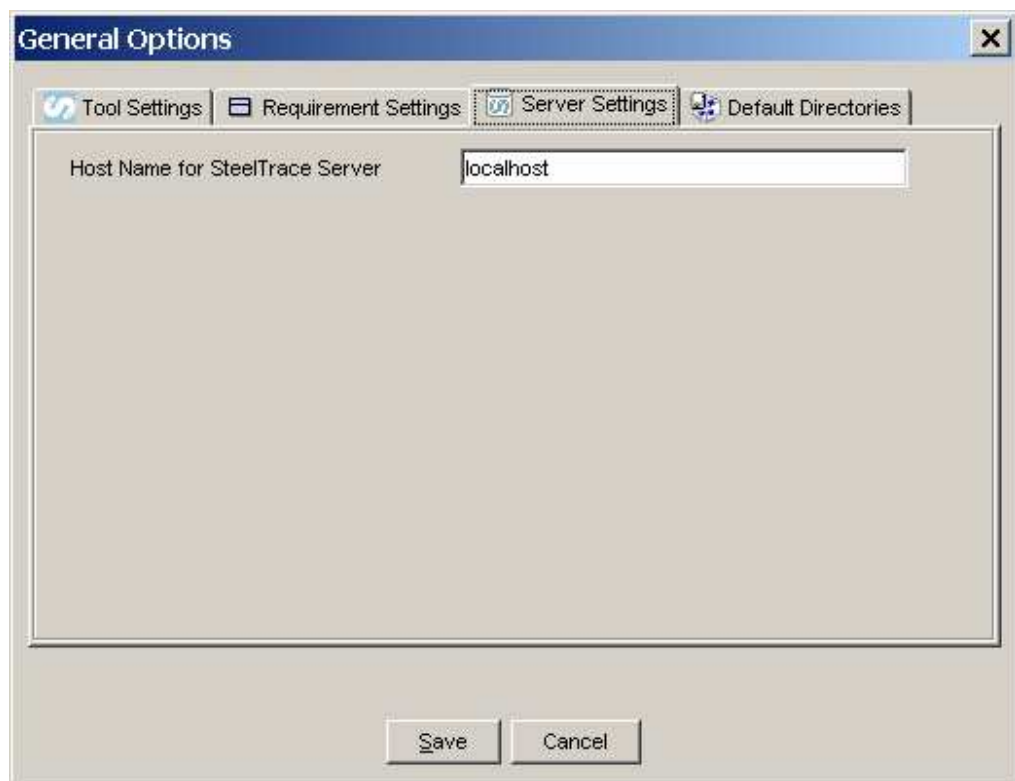You will get a message asking you to confirm that you want to migrate your data:

Note: It can take several hours to migrate your data from 3.1 to 4.0 format, depending on how big your database is. It may be best to perform this operation over night.

1.6 Run SteelTrace Enterprise 4.0

Once the migration is finished and your 4.0 Server has started successfully, you are now ready to use SteelTrace Enterprise 4.0:

- launch 'SteelTrace Enterprise 4.0' from the SteelTrace\SteelTrace Enterprise4.0 Start menu
- select the 'Options\General Options' menu item
- select the 'Server Settings' tab:

- enter the host name of your SteelTrace Server machine and hit save.
- You should now be able to open SteelTrace projects from the 'Project/Open Project' menu option.