

Windchill Upgrade Checklist

1. Export Windchill 6.2.6/7.0 LDAP content:

a. Exporting LDAP Content on Windows:

For Windows, use the following procedure to export data from an existing LDAP directory:

- i. Go to Start->Run->Type "services.msc"
- ii. Select "Aphelion Services" and click Stop
- iii. Open a command prompt window and make the Aphelion mapped drive (e.g. R:) active
- iv. Change directory by entering the following:
`cd \usr\var\Ide\PTCLdap`
- v. Enter the following command:
`\usr\sbin\Ide\export.exe -f PTCLdap_Ide.conf`
- vi. Open the Aphelion Ide.log.general file:
`R:\usr\var\Ide\PTCLdap\PTCLdap_logs\Ide.log.general`
- vii. Verify that the export completed properly by locating the following message in file:
Export: Export of all requested databases completed

Note: If this message has the time stamp corresponding to your export, the export was successful; you can ignore other messages in the file

- viii. Copy the exported root.ldif file found in `R:\usr\var\Ide\PTCLdap\PTCLdap_database` into a safe directory

b. Exporting LDAP Content on UNIX:

For UNIX, use the following procedure to export data from an existing LDAP directory:

- i. Stop Aphelion using the appropriate script for your platform
- ii. Change the directory by entering the following:
`cd /opt/ldc/var/PTCLdap`
- iii. Enter the following command:
`/opt/ldc/sbin/export -f ./PTCLdap_ldc.conf`
- iv. Open the Aphelion ldc.log.general file:
`opt/ldc/var/PTCLdap/PTCLdap_logs/ldc.log.general`
- v. Verify that the export completed properly by locating the following message in file:
Export: Export of all requested databases completed

Note: If this message has the time stamp corresponding to your export, the export was successful; you can ignore other messages in the file.

- vi. Copy the exported root.ldif file found in /opt/ldc/var/PTCLdap/PTCLdap_database into a safe directory.

2. Uninstall Aphelion (For Windchill 6.2.6/7.0)
3. Uninstall old JDK and Install JDK 1.4.2_12 (Download from <http://java.sun.com/j2se/1.4.2/download.html>)
4. Set JAVA_HOME environment variable (e.g. JAVA_HOME=C:\j2se1.4.2_12)

5. Reboot

6. Install Tomcat (For 8.0)

7. Install Apache (For 8.0)

8. Install Aphelion (For 8.0)

9. Install Info*Engine (For 8.0)

10. Check Info*Engine Installation:

- Start Apache, Tomcat
- Go to <http://localhost/Windchill/infoengine/jsp/examples/VerifyIE.jsp>
- Stop Apache, Tomcat

11. Install Windchill Services (For 8.0)

12. Install Windchill Solutions (PDMLink/ProjectLink) (For 8.0)

13. Run OCU (For 8.0) option 2:

- Use a different user name but use the same SID as Windchill 6.2.6/7.0
For example, if you used “guest” for Windchill 6.2.6/7.0 then use “guest8” for Windchill 8.0
- Check “sqlplus guest8/guest8@wind”

14. Start Apache, Tomcat

15. Run “windchill wt.load.WindchillLoader -All -IncludeDemo -Unattended”

16. Perform the pre-upgrade steps:

- For Windchill 6.2.6 continue from page 2-6 to page 2-17 of the Upgrade Guide
- For Windchill 7.0 continue from page 3-5 to page 3-13 of the Upgrade Guide

17. Export Windchill 8.0 Configuration Branch:

- Open a Windchill 8.0 shell and run the following command:
windchill com.infoengine.util.LDAPEXport -dir <Windchill_8.0_Home> -ldiff file confbCom.ldif -"reldn" dc=com
- Save the confbCom.ldif file to a safe location. It will be needed later.
- If your organization's TLD is something other than .com (e.g. .net) then you have to run the command again using that TLD as the reldn. For example:
windchill com.infoengine.util.LDAPEXport -dir <Windchill_8.0_Home> -ldiff file confbNet.ldif -"reldn" dc=net

18. Configure Database Connection for 8.0 Environment:

Point to the Oracle instance and database user that was used in your source installation.

To do this, run the following commands from Windchill 8.0 shell:

```
xconfmanager -t db\db.properties -s wt.pom.dbUser=<db_user_for_6.2.6/7.0> -p  
xconfmanager -t db\db.properties -s wt.pom.dbPassword=<db_user_password_for_6.2.6/7.0> -p
```

19. Export then delete Windchill 8.0 LDAP content

20. Import Windchill 6.2.6/7.0 LDAP content (From Step 1):

a. Importing LDAP Content on Windows:

For Windows, use the following procedure to import LDAP data that you had previously exported:

- i. Go to Start->Run->Type "services.msc"
- ii. Select "Aphelion Services" and click Stop
- iii. Open a command prompt window and make the Aphelion mapped drive (e.g. R:) active
- iv. Copy the saved version of the exported root.ldif file to the following:
R:\usr\var\lde\PTCLdap\PTCLdap_database\
- v. Change the directory by entering the following:
cd \usr\var\lde\PTCLdap
- vi. Enter the following:
\\usr\sbin\lde\import.exe -f PTCLdap_lde.conf
- vii. Open the Aphelion lde.log.general file:
R:\usr\var\lde\PTCLdap\PTCLdap_logs\lde.log.general
- viii. Verify that the import completed properly by locating the following messages in file:
Import: Index file building completed successfully.
Import complete: LDE localhost:<port_number>

Note: If these messages have the time stamp corresponding to your import, the import was successful; you can ignore other messages in the file.

b. Importing LDAP Content on UNIX:

For UNIX, use the following procedure to import LDAP data that you had previously exported:

- i. Stop Aphelion using the appropriate script for your platform.
- ii. Copy the saved version of the exported root.ldif file to the following:
`/opt/ldc/var/PTCLdap/PTCLdap_database/`
- iii. Change the directory by entering the following:
`cd /opt/ldc/var/PTCLdap`
- iv. Enter the following:
`/opt/ldc/sbin/import -f ./PTCLdap_ldc.conf`
- v. Open the Aphelion ldc.log.general file:
`/opt/ldc/var/PTCLdap/PTCLdap_logs/ldc.log.general`
- vi. Verify that the import completed properly by locating the following messages in file:
Import: Index file building completed successfully.
Import complete: LDC localhost: <port_number>

Note: If these messages have the time stamp corresponding to your import, the import was successful; you can ignore other messages in the file.

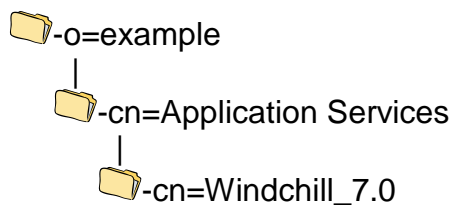
21. Reboot

22. Reconfigure Your Solution's Base DN:

Now we have to reference the source installation's LDAP base DN. Execute the following command from a Windchill 8.0 shell:

```
xconfmanager -s "ie.ldap.propertyBaseDn=<source-base-dn>" -p
```

For example, if your source base dn was the following:



Then you have to run the following from the Windchill 8.0 shell:

```
xconfmanager -s "ie.ldap.propertyBaseDn=cn=Windchill_7.0,cn=Application Services,o=example" -p
```

23. Import 8.0 Configuration Branch into the LDAP Instance Being Upgraded (From step 17):

Locate the configuration branch file you saved in step 17. Using this file, from a Windchill 8.0 shell, run the following command:

```
windchill com.infoengine.util.LDAPImport -dir <Windchill_8.0_Home> -ldiff file confbCom.ldif
```

If you have exported two configuration branch files then run the above command twice.

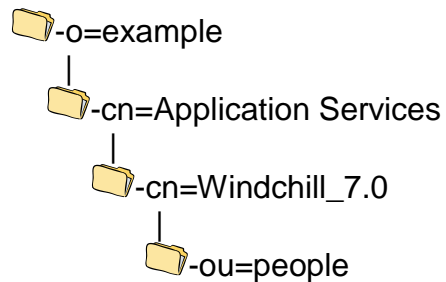
For example for TLD .net you have to run the following:

```
windchill com.infoengine.util.LDAPImport -dir <Windchill_8.0_Home> -ldiff file confbNet.ldif
```

24. Reconfigure Apache Authentication Settings:

You must update your target system's web server to authenticate against the "ou=people" node of the LDAP instance you are upgrading.

For example, if your LDAP structure was like the following:



Then change the “DldapUrl” property in the <Apache_Home>/conf/app-Windchill.properties file like the following:

```
DldapUrl=ldap://<Host_Name>/ou=people,cn=Windchill_7.0,cn=Application%20Services,o=example
```

Save the <Apache_Home>/conf/app-Windchill.properties file, run a Windchill 8.0 shell and browse to <Apache_Home> folder, then run the following command:

```
ant -f webAppConfig.xml regenWebAppConf
```

25. Run Upgrade Manager