

# Proficy Batch Execution 5.6

Upgrade Guide

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### **About This Guide**

This guide is intended for existing customers who are upgrading from a previous version of the Proficy Batch Execution product. It contains the instructions for upgrading existing Batch Execution systems, after you run the product install program.

### **Reference Documents**

Refer to the following manuals for detailed information on configuring and using Proficy Batch Execution. These manuals are available in electronic form. You can access these books by selecting Batch Execution Books from the Proficy Batch Execution program group or from any Help menu.

- Application Guide
- System Configuration Manual
- WorkInstruction Manual
- Phase Programming Manual
- PLI Development Manual
- Equipment Configuration Manual
- Recipe Development Manual
- Operations Manual
- Custom Applications manual

### **Overview**

Listed below are the tasks that you need to perform before, during, and after an upgrade of the Batch Execution product.

### Prepare for the Upgrade

Before you install the Batch Execution or WorkInstruction products, you should do the following:

- Read the Release Notes in the Important Product Information help (IPIBatchEx.chm on the Batch Execution CD) for the latest information.
- Make sure that all of the Archiver data has been processed prior to upgrading. If you do not, intermediate event data stored in .cch, .evt, and .dmp files may be inaccessible after the upgrade, due to the new Archiver format beginning in Batch 5.1.

**TIP:** If you have unprocessed Archiver data files such as cache (.cch), event (.evt), or dump (.dmp) files, and you continue with the upgrade, you will not be able to use this data in Batch

- 5.5. To recover this data, copy the files from the 5.5 computer to a computer with 5.0 installed. Configure your ODBC data source in Windows, and then in the Batch WorkSpace, navigate to the Batch Execution Configuration dialog box. Select the Archiver tab, enter the data source with the user name and password. Use the Batch Archiver Utility to process the files converting them to SQL and send them to the database. For more information on this utility, go to the GE GlobalCare SIM download page.
- Be aware that if your Archiver was configured to run remotely from your Batch Server you
  will need to reconfigure your Archiver to run locally. For more information, refer to the
  Configuring the Batch Execution Archiver section.
- Prior to Batch 5.1, it was possible to configure the Batch Archiver to run remotely from the Batch Server. Beginning with Batch 5.1, the Batch Archiver can only run local to your Batch Server computer. Remote Batch Archiver configurations must be reconfigured locally to the Batch Server. This information includes the DSN, username, and password specified under the Archiver tab within the WorkSpace in the Batch Execution Configuration dialog box. A Test Connection button allows you to verify the newly established connectivity to the target SQL or Oracle database. Please verify this connection before resuming batch operations.
- Make sure you shut down all Proficy Batch Execution applications. It is important that no
  Proficy Batch Execution applications are running when you run the installation program. To
  verify that there are no applications running, such as VBIS, launch the Task Manager and
  look for any Batch applications. If there are any running, abort the application from the Task
  Manager.
- Back up your existing .INI files with your application preferences.
- Make sure you note the Batch Serial Number in the VBEXEC.ini file. This file is located in your Windows directory.
  - IMPORTANT: You need to make sure you save a copy of the old VBEXEC.INI so that when you copy it over the new one, the batch serial number will get set back to the last number that was generated by the Batch Execution Server. The batch serial number is a unique number that the Batch Execution Server generates for each batch that is added to the Batch List.
- Create a backup of your Projects folder. Usually, this folder is: C:\Program
  Files\Proficy\Proficy Batch Execution\Projects. Back up all files and subdirectories within the
  Projects directory, including the .WKB files.
- Be sure that Internet Explorer is installed.
- Ensure that you have a product key. Without this new key, you will not be able to use Batch Execution, WorkInstruction or Campaign Manager.

### Install the Batch Execution Product

Once you have confirmed that you backed up all the applicable files, and completed all preparation tasks, you can run the Batch Execution product install. When you run the install, a message box appears asking you if you want to upgrade your system. Follow the instructions on your screen to install Batch Execution.

### Installing on Windows Vista or Windows 2008

**IMPORTANT:** If User Account Control (UAC) is not enabled, even if you have administrative privileges, you must use the following method to install Batch Execution.

#### To install Batch Execution on a Windows Vista or Windows Server 2008 system:

- 1. In Windows Explorer, navigate to the Batch Execution setup.exe file.
- 2. Right-click on the file and select Run as Administrator.
- 3. Follow the instructions on your screen.

### Passwords for Windows Server 2008

On Windows Server 2008, by default, the Password Must Meet Complexity Requirements is set to Enabled. This means that the default password, "batchrules", will not work during installation. You have two choices. Either you can provide a complex password, or you can disable the Password Must Meet Complexity Requirements option before installation. If you choose to disable the Password Must Meet Complexity Requirements, do the following:

- 1. Click the Start button, and point to Settings, Control Panel, Administrative Tools, and then Local Security Policy.
- 2. In the left pane, click Account Policies.
- 3. In the right pane, double-click Password Policy.
- 4. Double-click Password must meet complexity requirements. The Password Must Meet Complexity Requirements dialog box appears.
- 5. Click Disabled and then click OK.

### **Steps to Perform After You Upgrade**

After you run the Batch Execution installation program, do the following:

- Upgrade your relational databases to support the new data models.
- Upgrade your project files, including the area models and recipes for Batch Execution, and EIBs for WorkInstruction.
- If your Archiver was remote to your Batch Server (on another computer), reconfigure the Archiver. For information, refer to the Configuring the Batch Execution Archiver section.
- Optionally, upgrade your VBIS applications.
- The following sections provide more details on the steps that you perform after the product installation. For information on issues with the installation or upgrade, before or while you are installing, refer to the Release Notes tab of the Important Product Information help (IPIBatchEx.chm on the Batch Execution CD).

# **Relational Database Upgrades**

If you are storing recipes in, or are archiving Event Journal data to a relational database, you need to upgrade the following items in your relational databases:

- The Batch Execution tables that store the recipe data.
- The Batch Execution Event Journal data tables that store event journal data.

As a precautionary measure, before you upgrade your relational databases, you should back up the data in these tables.

Batch Execution provides upgrade scripts for Microsoft ® SQL Server and Oracle ® databases. Refer to the following sections for instructions on running the upgrade scripts for SQL and Oracle databases:

- SQL Server Database Upgrades
- Oracle Database Upgrades

**IMPORTANT:** GE does not support the use of Microsoft ® Access for archiving data in a production environment. WorkInstruction only works with Oracle or SQL Server.

For information on the table structures, refer to the appendices in the Custom Applications manual.

### **SQL Server Database Upgrades**

Batch Execution provides scripts to upgrade the tables within your SQL Server's relational database. These scripts reside in the Batch Execution DatabaseFiles folder, typically, C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles.

Refer to the following table for a listing of the scripts used to upgrade the database. The same scripts are used for upgrading SQL Server 2005 and SQL Server 2008 databases.

S	SQL Database Upgrade Scripts	
Upgrade	Scripts Needed for Upgrade	
version 5.5 to 5.6	If you used Campaign Management in a previous version of Batch, and want to continue using it, you must run the following script:	
	MSQLCampaign_V55toV56Upgrade.SQL	
	If you have not used Campaign Management before and would like to use it now, you must run the following script:	
	CampaignMSSQL.sql	
	If you do not want to use the Campaign Management feature, then you do not have to run any upgrade scripts.	
version 5.1 SP1 to 5.5	MSQLArchiver_V51to55Upgrade.sql	
	IMPORTANT:	
	If you want to use the Batch Analysis product with Batch Execution, you also need to run these script files: msqlarchiver_BatchAnalysis_V51toV55Upgrade.sql. Archiver3x_Trigger_V51to55Upgrade.sql	
	If you want to use the Campaign Manager, you also need to run this script file: CampaignMSSQL.sql	
version 5.1 to SP1	If you want to use the Formulation Management feature within Batch Execution Recipe Editor, you need to run the following script files:	
	msql6x_FormulationUpgrade.sql	
	MSQLArchiver_FormulationsUpgrade.sql	
	IMPORTANT: If you want to use the Batch Analysis product with Batch Execution, you also need to run this script file:	
	msqlarchiver_BatchAnalysis_V51toV51Sp1Upgrade.sql.	
version 5.0 to 5.1	MSQLArchiver_V50to51Upgrade.sql	
	MSQLRecipe_v50tov51Upgrade.SQL	
	IMPORTANT: If you want to use the Batch Analysis product with Batch Execution, you also need to run this script file:  msqlarchiver_BatchAnalysis_V50toV51Upgrade.sql.	

SQL Database Upgrade Scripts		
Upgrade	Scripts Needed for Upgrade	
version 4.7 to 5.0	MSQLArchiver_V47to50Upgrade.SQL MSQLRecipe_v47tov50Upgrade.SQL MSQLAudit_V47to50Upgrade.SQL	
version 4.6 to 4.7	MSQLArchiver_v46tov47Upgrade.SQL MSQLRecipe_v46tov47Upgrade.SQL MSQLAuditTable.SQL	
version 4.5 to 4.6	MSQLArchiver_v45tov46Upgrade.SQL	
version 4.1 to 4.5	MSQLRecipe_v41Tov45Upgrade.SQL MSQLArchiver_v41tov45Upgrade.SQL	

### **Oracle Database Upgrades**

Batch Execution provides upgrade scripts to upgrade the Batch Execution database tables within your Oracle Server's relational database. These scripts reside in the Batch Execution DatabaseFiles folder, typically C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles, if you installed the product to the default location.

Refer to the following table for a listing of the scripts used to upgrade the database. The same scripts are used for upgrading Oracle 10g and Oracle 11g databases.

Oracle Database Upgrade Scripts	
Upgrade	Scripts Needed for Upgrade
version 5.5 to 5.6	If you used Campaign Management in a previous version of Batch, and want to continue using it, you must run the following script:
	OraSQLCampaign_V55to56Upgrade.sql
	If you have not used Campaign Management before and would like to use it now, you must run the following script:
	CampaignOra.sql
	If you do not want to use the Campaign Management feature, then you do not have to run any upgrade scripts.

Oracle Database Upgrade Scripts		
Upgrade	Scripts Needed for Upgrade	
version 5.1SP1 to 5.5	OraSQLArchiver_V51to55Upgrade.sql	
	IMPORTANT: if you want to use the Campaign Manager, you also need to run this script file: CampaignOra.sql	
version 5.1 to SP1	If you want to use the Formulation Management feature within Batch Execution Recipe Editor, you need to run the following script files:	
	OraSQL7x_FormulationUpgrade.sql	
	OraSQLArchiver_FormulationsUpgrade.sql	
version 5.0 to 5.1	OraSQLArchiver_V50to51Upgrade.sql	
	OraSQLRecipe_v50to51Upgrade.sql	
version 4.7 to 5.0	OraSQLArchiver_V47to50Upgrade.SQL	
	OraSQLRecipe_v47to50Upgrade.SQL	
	OraSQLAudit_V47to50Upgrade.SQL	
version 4.6 to 4.7	OraSQL7x_v46tov47Upgrade.SQL	
	OraArchiver_v46tov47Upgrade.SQL	
	OracleAuditTable.SQL	
version 4.5 to 4.6	OraSQLArchiver_v45tov46Upgrade.SQL	
version 4.1 to 4.5	OraSQLRecipe_v41tov45Upgrade.SQL OraSQLArchiver_v41tov45Upgrade.SQL	

### **ODBC System DSN Configuration**

Because the Batch Execution Server can run as a Windows service, you need to configure the recipe (VBIS database) and archiver (Event Journal database) ODBC data sources as System DSNs.

**IMPORTANT:** Batch Execution does not support the Microsoft ODBC for Oracle driver because it does not implement all the required features. Oracle users should use the Oracle ODBC driver instead.

Once the data sources are defined, log into your relational database server with the client software you installed to ensure the Batch Execution Server can connect to your relational database server.

# **Batch Execution Project File Upgrades**

You must upgrade your relational database tables before you upgrade your project files. Refer to the <u>Relational Database Upgrades</u> section for instructions.

### **Area Models and Recipes**

To upgrade your area model and recipes you need to open each project file individually in the Batch Execution WorkSpace. Perform these steps for each project created in a previous version of Batch Execution.

**IMPORTANT:** You must upgrade your recipes in order to run them in the latest version of Batch Execution. Failure to do so will cause problems with the Batch Execution Server.

### **EIBs for WorkInstruction**

WorkInstruction stores the Electronic Instruction Blocks (EIBs) as XML files. These XML files conform to an XML schema developed by GE. In WorkInstruction, the XML schema includes additional elements and attributes to support the new features. If you do not upgrade these EIBs to the new format, you will not be able to execute them at run-time; the EIB Server rejects them.

To upgrade an EIB from a previous version of WorkInstruction, you need to check out the older version of the EIB in the new WorkInstruction Editor. When you open an older file, WorkInstruction can also upgrade all EIBs in that same folder.

After you upgrade an EIB, you need to verify and then resave it in the WorkInstruction Editor before you check it back in (to the Work project) so that you can move it to the Production project in the DMS.

# **VBIS Applications Upgrade**

Batch Execution includes several new interfaces and revisions. If you want to take advantage of the functionality within the newest interfaces you will need to modify your VBIS applications to use the revised interfaces.

If you do not want to upgrade VBIS, existing applications written against previous versions of VBIS will still work without having to recompile. The older VBIS interfaces were left intact to provide backward compatibility so that you do not need to recompile existing VBIS applications. However, if you are programming a new VBIS application or want to upgrade existing applications to take advantage of the new functionality with the latest version of Batch Execution, you will need to use the revised interfaces.

### **Upgrading from Version 4.6 or Earlier**

If you are upgrading from version 4.6 or earlier, and you want to use VBIS to schedule batches in a custom program, only allow 128 characters for the Batch\_ID field of your program. This is because the database accepts only 128 characters for the Batch\_ID.

Also, be aware that when you are upgrading from a previous version, you need to change the RECIPE\_ID field to 255 characters in the BATCH table. In previous releases, the RECIPE\_ID field was limited to 40 characters. You can update this value by going into the database software and changing it.

# **ActiveX Controls and Upgrading**

If you are upgrading from a previous release, and you used ActiveX controls in your pictures, you will need to delete temporary .EXD files from previous versions.

When you upgrade Batch Execution, your ActiveX controls are automatically upgraded. You may want to configure some of the new properties provided in this release, such as the Enter Operator Comments feature in the BatchList and SFC controls.

### **Deleting .EXD Files Before Using the ActiveX Controls**

If you manually install the Batch Execution ActiveX controls on to a computer with iFIX installed without installing Batch Execution 5.6, and you have a version prior to Batch Execution 5.1 of the Batch Execution or WorkInstruction ActiveX controls installed on that computer, then you need to delete the .EXD files from the old ActiveX controls.

The .EXD files are essentially temporary files that contain the type library of the control and extended properties used by the container (Name, IsSelectable, HorizontalPosition, VerticalPosition, and so on). The .EXD file is regenerated the first time the control is dropped onto an iFIX picture and is also regenerated as needed if the .EXD file is deleted. So, when upgrading from 4.6 to 5.5, you must delete these old .EXD files since they will contain old type library information and will not include the new properties.

These files are located in the Temp folder. The files that you need to delete are as follows:

- ewixlib.exd
- batchlistlib.exd
- bacthaddlib.exd
- recipelistlib.exd
- alarmlistlib.exd
- operpromptslib.exd
- bindingpromptslib.exd
- sfclib.exd
- manualphaselib.exd

### How Do I...

This section outlines the steps to perform the following tasks:

- <u>Upgrade a SQL Server 2008 Database</u>
- <u>Upgrade a SQL Server 2005 Database</u>
- Upgrade an Oracle 11g Database
- Upgrade an Oracle 10g Database
- Configure ODBC System DSNs
- <u>Update Your Project Files</u>
- Upgrade VBIS Applications from Version 4.6 and Earlier

### **Upgrade a SQL Server 2008 Database**

- The following steps describe how to upgrade your SQL Server 2008 database from previous versions of Batch Execution:
- Upgrading your database from 5.5 to 5.6
- Upgrading your database from 5.1 SP1 to 5.5
- Upgrading your database from 5.1 to SP1
- Upgrading your database from 5.0 to 5.1
- Upgrading your database from 4.7 to 5.0
- Upgrading your database from 4.6 to 4.7
- Upgrading your database from 4.5 to 4.6
- Upgrading your database from 4.1 to 4.5

**NOTE:** If your upgrade path is not listed above, then you must complete, in order, the update procedures for each upgrade between your version of Batch and the current version of Batch. For example, if you have Batch 4.7, then you must perform the upgrade procedures for 4.7, 5.0, 5.1, and 5.1 SP1 in that order. Failure to do so may have unintended consequences for your database.

### ▶To upgrade your database from 5.5 to 5.6:

- 1. Are you currently using the Campaign Management feature? If so, go to Step A. If not, go to Step B.
  - A. Copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer, and proceed to Step 2:

MSQLCampaign\_V55toV56Upgrade.SQL

B. If you want to use the Campaign Management feature, copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer, and proceed to Step 2:

### CampaignMSSQL.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLCampaign\_V55toV56Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.

### ▶To upgrade your database from 5.1 SP1 to 5.5:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_V51to55Upgrade.SQL
  - CampaignMSSQl.sql (only if you want to use the Campaign Management feature)
  - msqlarchiver\_BatchAnalysis\_V51toV55Upgrade.sql and Archiver3x\_Trigger\_V51to55Upgrade.sql (only if you use the Batch Analysis product with Batch Execution)

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.

- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLArchiver\_V51to55Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. If you want to use the Campaign Manager or Batch Analysis, repeat steps 6-10 for the CampaignMSSQl.sql and the msqlarchiver BatchAnalysis V51toV55Upgrade.sql script.
- 12. Add the BUILTIN\Administrators to the Logins. To do so:
  - a. In the left pane, under the Security folder, right-click the Login folder.
  - b. Click New Login. The Login New window appears.
  - c. In the Login Name field enter BUILTIN\Administrators.
  - d. From the left pane, select Server Roles.
  - e. In the Server Roles area, select sysadmin.
  - f. Click OK.

### ▶To upgrade your database from 5.1 to SP1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - msql6x\_FormulationUpgrade.sql
  - MSQLArchiver FormulationsUpgrade.sql
  - msqlarchiver\_BatchAnalysis\_V51toV51Sp1Upgrade.sql (only if you use the Batch Analysis product with Batch Execution)

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the msql6x\_FormulationUpgrade.sql script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.

- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 6-10 for the MSQLArchiver\_FormulationsUpgrade.sql script.
- 12. If you use the Batch Analysis product with Batch Execution, repeat steps 6-10 for the msqlarchiver\_BatchAnalysis\_V51toV51Sp1Upgrade.sql script.

### ▶To upgrade your database from 5.0 to 5.1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_V50to51Upgrade.SQL
  - MSQLRecipe\_v50tov51Upgrade.SQL
  - msqlarchiver\_BatchAnalysis\_V50toV51Upgrade.sql (only if you want to use the Batch Analysis product with Batch Execution)

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLArchiver\_V50to51Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 6-10 for the MSQLRecipe\_v50tov51Upgrade.SQL script.
- 12. If you use Batch Analysis with Batch Execution, repeat steps 6-10 with the msqlarchiver\_BatchAnalysis\_V50toV51Upgrade.sql script.

### ▶To upgrade your database from 4.7 to 5.0:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_V47to50Upgrade.SQL
  - MSQLRecipe v47tov50Upgrade.SQL
  - MSQLAudit\_V47to50Upgrade.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy\Batch Execution\DatabaseFiles folder.

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLArchiver\_V47to50Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 6-10 for the MSQLRecipe\_v47tov50Upgrade.SQL script and then the MSQLAudit\_V47to50Upgrade.SQL script.

### ▶To upgrade your database from 4.6 to 4.7:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_v46tov47Upgrade.SQL
  - MSQLRecipe v46tov47Upgrade.SQL
  - MSQLAuditTable.SQL

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.

- 9. Select the MSQLArchiver\_v46tov47Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 6-10 for the MSQLRecipe\_v46tov47Upgrade.SQL script and then the MSQLAuditTable.SQL script.

### ▶To upgrade your database from 4.5 to 4.6:

 Copy this script file from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:

MSQLArchiver\_v45tov46Upgrade.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLArchiver\_v45tov46Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.

#### ▶To upgrade your database from 4.1 to 4.5:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SOL Server computer:
  - MSQLArchiver\_v41tov45Upgrade.SQL
  - MSQLRecipe\_v41tov45Upgrade.SQL

- Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.

- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLArchiver\_v41tov45Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 6-10 for the MSQLRecipe\_v41tov45Upgrade.SQL script.

### **Upgrade a SQL Server 2005 Database**

The following steps describe how to upgrade your SQL Server 2005 database from previous versions of Batch Execution:

- Upgrading your database from 5.5 to 5.6
- Upgrading your database from 5.1 SP1 to 5.5
- Upgrading your database from 5.1 to SP1
- Upgrading your database from 5.0 to 5.1
- Upgrading your database from 4.7 to 5.0
- Upgrading your database from 4.6 to 4.7
- Upgrading your database from 4.5 to 4.6
- Upgrading your database from 4.1 to 4.5

#### ▶To upgrade your database from 5.5 to 5.6:

- 1. Are you currently using the Campaign Management feature? If so, go to Step A. If not, go to Step B.
  - A. Copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer, and proceed to Step 2:

MSQLCampaign\_V55toV56Upgrade.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the  $C:\Program\ Files\Proficy\Proficy\ Batch\ Execution\DatabaseFiles$  folder.

B. If you want to use the Campaign Management feature, copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer, and proceed to Step 2:

CampaignMSSQL.sql

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLArchiver\_V51to55Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.

### ▶To upgrade your database from 5.1 SP1 to 5.5:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_V51to55Upgrade.SQL
  - CampaignMSSQl.sql (only if you want to use the Campaign Manager feature)
  - msqlarchiver\_BatchAnalysis\_V51toV55Upgrade.sql and Archiver3x\_Trigger\_V51to55Upgrade.sql (only if you use the Batch Analysis product with Batch Execution)

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears and the Connect to Database Engine dialog box appears.
- 3. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 4. Click the Options button to view more configurable fields.
- 5. In the Connect to Database field, select the database name from the drop-down list or browse for a database. Click Connect.
- 6. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 7. Select the Tables folder for the database that you plan to upgrade.
- 8. On the File menu, click Open and then File. The Open File dialog box appears.
- 9. Select the MSQLArchiver\_V51to55Upgrade.SQL script and click Open. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.

11. If you want to use the Campaign Manager or Batch Analysis, repeat steps 6-10 for the CampaignMSSQl.sql and the msqlarchiver\_BatchAnalysis\_V51toV55Upgrade.sql script.

### ▶To upgrade your database from 5.1 to SP1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - msql6x\_FormulationUpgrade.sql
  - MSQLArchiver FormulationsUpgrade.sql
  - msqlarchiver\_BatchAnalysis\_V51toV51Sp1Upgrade.sql (only if you use the Batch Analysis product with Batch Execution)

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears.
- 3. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 4. Select the Tables folder for the database that you plan to upgrade.
- 5. On the File menu, click Open and then File. The Open File dialog box appears.
- 6. Select the msql6x\_FormulationUpgrade.sql script and click Open. The Connect to Database Engine dialog box appears.
- 7. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 8. Click the Options button to view more configurable fields.
- 9. In the Connect to Database field, select the database name from the drop-down list or browse for a database. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 5-10 for the MSQLArchiver\_FormulationsUpgrade.sql script.
- 12. If you use the Batch Analysis product with Batch Execution, repeat steps 5-10 for the msqlarchiver\_BatchAnalysis\_V51toV51Sp1Upgrade.sql script.

### ▶To upgrade your database from 5.0 to 5.1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_V50to51Upgrade.SQL
  - MSQLRecipe\_v50tov51Upgrade.SQL
  - msqlarchiver\_BatchAnalysis\_V50toV51Upgrade.sql (only if you want to use the Batch Analysis product with Batch Execution)

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears.
- 3. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 4. Select the Tables folder for the database that you plan to upgrade.
- 5. On the File menu, click Open and then File. The Open File dialog box appears.
- 6. Select the MSQLArchiver\_V50to51Upgrade.SQL script and click Open. The Connect to Database Engine dialog box appears.
- 7. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 8. Click the Options button to view more configurable fields.
- 9. In the Connect to Database field, select the database name from the drop-down list or browse for a database. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 5-10 for the MSQLRecipe\_v50tov51Upgrade.SQL script.
- 12. If you use Batch Analysis with Batch Execution, repeat steps 5-10 with the msqlarchiver\_BatchAnalysis\_V50toV51Upgrade.sql script.

### ▶To upgrade your database from 4.7 to 5.0:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_V47to50Upgrade.SQL
  - MSQLRecipe\_v47tov50Upgrade.SQL
  - MSQLAudit\_V47to50Upgrade.SQL

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears.
- 3. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 4. Select the Tables folder for the database that you plan to upgrade.
- 5. On the File menu, click Open and then File. The Open File dialog box appears.
- 6. Select the MSQLArchiver\_V47to50Upgrade.SQL script and click Open. The Connect to Database Engine dialog box appears.
- 7. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 8. Click the Options button to view more configurable fields.
- 9. In the Connect to Database field, select the database name from the drop-down list or browse for a database. The script opens as a new tab in the Microsoft SQL Server Management Studio window.

- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 5-10 for the MSQLRecipe\_v47tov50Upgrade.SQL script and then the MSQLAudit\_V47to50Upgrade.SQL script.

### ▶To upgrade your database from 4.6 to 4.7:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_v46tov47Upgrade.SQL
  - MSQLRecipe\_v46tov47Upgrade.SQL
  - MSQLAuditTable.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears.
- 3. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 4. Select the Tables folder for the database that you plan to upgrade.
- 5. On the File menu, click Open and then File. The Open File dialog box appears.
- 6. Select the MSQLArchiver\_v46tov47Upgrade.SQL script and click Open. The Connect to Database Engine dialog box appears.
- 7. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 8. Click the Options button to view more configurable fields.
- 9. In the Connect to Database field, select the database name from the drop-down list or browse for a database. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 5-10 for the MSQLRecipe\_v46tov47Upgrade.SQL script and then the MSQLAuditTable.SQL script.

#### ▶To upgrade your database from 4.5 to 4.6:

1. Copy this script file from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:

MSQLArchiver\_v45tov46Upgrade.SQL

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears.
- 3. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.

- 4. Select the Tables folder for the database that you plan to upgrade.
- 5. On the File menu, click Open and then File. The Open File dialog box appears.
- 6. Select the MSQLArchiver\_v45tov46Upgrade.SQL script and click Open. The Connect to Database Engine dialog box appears.
- 7. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 8. Click the Options button to view more configurable fields.
- 9. In the Connect to Database field, select the database name from the drop-down list or browse for a database. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.

### ▶To upgrade your database from 4.1 to 4.5:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the SQL Server computer:
  - MSQLArchiver\_v41tov45Upgrade.SQL
  - MSQLRecipe\_v41tov45Upgrade.SQL

- 2. Click the Start button and point to Programs, Microsoft SQL Server, and then SQL Server Management Studio. The Microsoft SQL Server Management Studio window appears.
- 3. In the tree view, in the Databases folder, double-click the database name that you want to upgrade. For example, the database name might be BatchExecution or ARCHIVER.
- 4. Select the Tables folder for the database that you plan to upgrade.
- 5. On the File menu, click Open and then File. The Open File dialog box appears.
- 6. Select the MSQLArchiver\_v41tov45Upgrade.SQL script and click Open. The Connect to Database Engine dialog box appears.
- 7. In the Server Name field, make sure that the server you want appears in this field. If it does not, select the server from the drop-down list or browse for it.
- 8. Click the Options button to view more configurable fields.
- 9. In the Connect to Database field, select the database name from the drop-down list or browse for a database. The script opens as a new tab in the Microsoft SQL Server Management Studio window.
- 10. In the toolbar, click the Execute button.
- 11. Repeat steps 5-10 for the MSQLRecipe\_v41tov45Upgrade.SQL script.

### **Upgrade an Oracle 11g Database**

The following steps describe how to upgrade your Oracle 11g database from previous versions of Batch Execution:

- Upgrading your database from 5.5 to 5.6
- Upgrading your database from 5.1 SP1 to 5.5
- Upgrading your database from 5.1 to SP1
- Upgrading your database from 5.0 to 5.1
- Upgrading your database from 4.7 to 5.0
- Upgrading your database from 4.6 to 4.7
- Upgrading your database from 4.5 to 4.6
- Upgrading your database from 4.1 to 4.5

### ▶To upgrade your database from 5.5 to 5.6:

- 1. Are you currently using the Campaign Management feature? If so, go to Step A. If not, go to Step B.
  - A. Copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the Oracle Server computer, and proceed to Step 2:

OraSQLCampaign\_V55to56Upgrade.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

B. If you want to use the Campaign Management feature, copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the Oracle Server computer, and proceed to Step 2:

CampaignOra.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraSQLCampaign\_V55to56Upgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

#### For example:

```
@"c:\Program Files\Proficy\Proficy Batch
Execution\databasefiles\OraSQLCampaign_V55to56Upgrade.sql"
```

### ▶To upgrade your database from 5.1 SP1 to 5.5:

- 1. Copy the script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_V51to55Upgrade.sql
  - CampaignOra.sql (optional if you want to use the Campaign Manager, you need to run this script)

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- 2. From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraSQLArchiver\_V51to55Upgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

#### For example:

```
@"c:\Program Files\Proficy\Proficy Batch
Execution\databasefiles\OraSQLArchiver_V51to55Upgrade.sql"
```

5. If necessary, repeat step 4 with the CampaignOra.sql script.

### ▶To upgrade your database from 5.1 to SP1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_FormulationsUpgrade.sql
  - OraSQL7x\_FormulationUpgrade.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus.
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraSQLArchiver\_FormulationsUpgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

#### For example:

```
@"c:\Program Files\Proficy\Proficy Batch
Execution\databasefiles\OraSQLArchiver_FormulationsUpgrade.sql"
```

5. Repeat step 4 with the OraSQL7x\_FormulationUpgrade.sql script.

### ▶To upgrade your database from 5.0 to 5.1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_V50to51Upgrade.sql
  - OraSQLRecipe\_v50to51Upgrade.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus.
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraSQLArchiver\_V50to51Upgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

#### For example:

```
@"c:\Program Files\Proficy\Proficy Batch
Execution\databasefiles\OraSQLArchiver_V50to51Upgrade.sql"
```

5. Repeat step 4 with the OraSQLRecipe\_v50to51Upgrade.sql script.

### ▶To upgrade your database from 4.7 to 5.0:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_V47to50Upgrade.SQL
  - OraSQLRecipe\_v47to50Upgrade.SQL
  - OraSQLAudit\_V47to50Upgrade.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus.
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraSQLArchiver\_V47to50Upgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

#### For example:

```
 @ "c:\Program Files\\Proficy\\Proficy Batch \\ Execution\\databasefiles\\OraSQLArchiver\_V47to50Upgrade.sql" \\
```

5. Repeat step 4 with the OraSQLRecipe\_v47to50Upgrade.SQL and then the OraSQLAudit\_V47to50Upgrade.SQL script.

#### ▶To upgrade your database from 4.6 to 4.7:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraArchiver\_v46tov47Upgrade.SQL
  - OraSQL7x\_v46tov47Upgrade.SQL
  - OracleAuditTable.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus.
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraArchiver\_V46to47Upgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

### For example:

```
@"c:\Program Files\Proficy\Proficy Batch
Execution\databasefiles\OraArchiver_V46to47Upgrade.sql"
```

5. Repeat step 4 with the OraSQL7x\_v46tov47Upgrade.SQL and then the OracleAuditTable.SQL script.

### ▶To upgrade your database from 4.5 to 4.6:

1. Copy this script file from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:

```
OraSQLArchiver_v45tov46Upgrade.SQL
```

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus.
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraSQLArchiver\_V45to46Upgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

#### For example:

```
@"c:\Program Files\Proficy\Proficy Batch
Execution\databasefiles\OraSQLArchiver_V45to46Upgrade.sql"
```

### ▶To upgrade your database from 4.1 to 4.5:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_v41tov45Upgrade.SQL
  - OraSQLRecipe\_v41tov45Upgrade.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

- From the Start menu, point to Programs, Oracle, Application Development, and then SQL Plus.
- 3. Enter the user name and password for the account you want to use to connect to the database.
- 4. Run the OraSQLArchiver\_V41to45Upgrade.sql script. To do so, enter the following at the command line:

```
@"file location of script"
```

#### For example:

```
@"c:\Program Files\Proficy\Proficy Batch
Execution\databasefiles\OraSQLArchiver_V41to45Upgrade.sql"
```

5. Repeat step 4 with the OraSQLRecipe\_v41tov45Upgrade.SQL script.

### **Upgrade an Oracle 10g Database**

The following steps describe how to upgrade your Oracle 10g database from previous versions of Batch Execution:

- Upgrading your database from 5.5 to 5.6
- Upgrading your database from 5.1 SP1 to 5.5
- <u>Upgrading your database from 5.1 to SP1</u>
- <u>Upgrading your database from 5.0 to 5.1</u>
- Upgrading your database from 4.7 to 5.0
- Upgrading your database from 4.6 to 4.7
- Upgrading your database from 4.5 to 4.6
- Upgrading your database from 4.1 to 4.5

### ▶To upgrade your database from 5.5 to 5.6:

- 1. Are you currently using the Campaign Management feature? If so, go to Step A. If not, go to Step B.
  - A. Copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the Oracle Server computer, and proceed to Step 2:

 $Or a SQL Campaign\_V55 to 56 Upgrade. sql$ 

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

B. If you want to use the Campaign Management feature, copy the following script file from the DatabaseFiles folder of your Batch Server to any folder on the Oracle Server computer, and proceed to Step 2:

CampaignOra.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

http://5.22.72.1:5501/em

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- 6. Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.
- 8. Open the OraSQLCampaign\_V55to56Upgrade.sql file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.
- 14. After the script finishes running, click Clear.

### ▶To upgrade your database from 5.1 SP1 to 5.5:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_V51to55Upgrade.sql
  - CampaignOra.sql (optional if you want to use the Campaign Manager, you need to run this script)

2. Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

http://5.22.72.1:5501/em

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- 6. Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.
- 8. Open the OraSQLArchiver\_V51to55Upgrade.sql file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.
- 14. After the script finishes running, click Clear.
- 15. If necessary, repeat steps 7-14 with the CampaignOra.sql script.

### ▶To upgrade your database from 5.1 to SP1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_FormulationsUpgrade.sql
  - OraSQL7x\_FormulationUpgrade.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

2. Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

http://5.22.72.1:5501/em

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- 6. Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.

- Open the OraSQLArchiver\_FormulationsUpgrade.sql file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.
- 14. After the script finishes running, click Clear.
- 15. Repeat steps 7-14 with the OraSQL7x\_FormulationUpgrade.sql script.

### ▶To upgrade your database from 5.0 to 5.1:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_V50to51Upgrade.sql
  - OraSQLRecipe\_v50to51Upgrade.sql

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

2. Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- 6. Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.
- 8. Open the OraSQLArchiver\_V50to51Upgrade.sql file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.

- 14. After the script finishes running, click Clear.
- 15. Repeat steps 7-14 with the OraSQLRecipe\_v50to51Upgrade.sql script.

### ▶To upgrade your database from 4.7 to 5.0:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_V47to50Upgrade.SQL
  - OraSQLRecipe\_v47to50Upgrade.SQL
  - OraSQLAudit\_V47to50Upgrade.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

http://5.22.72.1:5501/em

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- 6. Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.
- 8. Open the OraSQLArchiver\_V47to50Upgrade.SQL file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.
- 14. After the script finishes running, click Clear.
- 15. Repeat steps 7-14 with the OraSQLRecipe\_v47to50Upgrade.SQL and then the OraSQLAudit\_V47to50Upgrade.SQL script.

#### ▶To upgrade your database from 4.6 to 4.7:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraArchiver\_v46tov47Upgrade.SQL
  - OraSQL7x\_v46tov47Upgrade.SQL
  - OracleAuditTable.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

2. Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

http://5.22.72.1:5501/em

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.
- 8. Open the OraArchiver\_v46tov47Upgrade.SQL file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.
- 14. After the script finishes running, click Clear.
- 15. Repeat steps 7-14 with the OraSQL7x\_v46tov47Upgrade.SQL and then the OracleAuditTable.SQL script.

### ▶To upgrade your database from 4.5 to 4.6:

 Copy this script file from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:

OraSQLArchiver\_v45tov46Upgrade.SQL

2. Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

http://5.22.72.1:5501/em

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- 6. Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.
- 8. Open the OraSQLArchiver\_v45tov46Upgrade.SQL file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.
- 14. After the script finishes running, click Clear.

### ▶To upgrade your database from 4.1 to 4.5:

- 1. Copy these script files from the DatabaseFiles folder of your Batch Server to any folder on the Oracle server computer:
  - OraSQLArchiver\_v41tov45Upgrade.SQL
  - OraSQLRecipe v41tov45Upgrade.SQL

**NOTE:** If you installed Batch Execution to the default location, you can find the script files in the C:\Program Files\Proficy\Proficy Batch Execution\DatabaseFiles folder.

2. Open Internet Explorer, and in the Address field, enter the IP address and port to open your Batch Execution database. For example:

http://5.22.72.1:5501/em

- 3. Enter a User Name and Password for the user account with administrative privileges for the Batch Execution database tables. After a few moments, the main screen appears.
- 4. At the bottom of the screen, in the Related Topics, click the iSQLPlus link. The iSQLPlus Login screen appears.
- 5. Leave the Connect as Normal option selected and click Continue.
- 6. Enter a user name and password, and then click Login to start iSQLPlus.
- 7. Leave the Internet Explorer window open.

- 8. Open the OraSQLArchiver\_v41tov45Upgrade.SQL file in a text editor, such as Notepad, and copy the script contents.
- 9. Go back to the Internet Explorer window, and in the Workspace area, paste the script. Make sure that there are no extra paragraph spaces after you paste the text.
- 10. Click the Preferences button.
- 11. In the Output Page Setup area, select Single Page so that all output displays on a single page, and click Apply.
- 12. Click the Workspace tab to return to your pasted script.
- 13. Click Execute. The results appear in the bottom half of the window, displaying messages that let you monitor your progress.
- 14. After the script finishes running, click Clear.
- 15. Repeat steps 7-14 with the OraSQLRecipe\_v41tov45Upgrade.SQL script.

### **Configure ODBC System DSNs**

The steps below explain how to configure an ODBC system DSN.

**IMPORTANT:** Batch Execution does not support the Microsoft ODBC for Oracle driver because it does not implement all the required features. Oracle users should use the Oracle ODBC driver instead.

### ▶To configure an ODBC data source:

- 1. Click the Start button and point to Programs, Administrative Tools, and then Data Sources (ODBC). You can also access the Administrative Tools folder from the Control Panel.
  - The ODBC Data Source Administrator program opens.
- 2. Select the System DSN tab.
- 3. Select the Add button. The Add Data Sources dialog box appears.
- 4. Select the type of relational database you want to use and click OK. A dialog box appears.
- 5. In the Data Source Name field, enter the data source name. Make sure the data source name matches the name defined in your project.
- 6. In the Server field, enter the name of your relational database server.
- 7. Click OK or continue through the rest of the configuration.

### **Update Your Project Files**

The following steps explain how to update your Batch Execution and WorkInstruction project files:

- Upgrading your area model, recipes and formulations
- Upgrading existing EIB documents in the Work project
- Verifying and moving the upgraded EIBs in production

**IMPORTANT:** You must upgrade your recipes in order to run them in the latest version of Batch Execution. Failure to do so will cause problems with the Batch Execution Server.

### ▶To upgrade your area model, recipes and formulations:

- 1. Start the Proficy Batch Execution WorkSpace.
- 2. Open a project created in a previous version of Batch Execution. Batch Execution automatically prompts you to upgrade the area model to the new format.
- 3. Select Yes to continue.
- 4. On the File menu, click Save.
- 5. Double-click the Recipes folder in the system tree and double-click any recipe. Batch Execution prompts you to upgrade your recipes.
- 6. Click Yes to upgrade your recipes. Batch Execution upgrades and saves each recipe in the project.

**NOTE:** For more information on configuring equipment paths in the area model, refer to the Equipment Configuration Manual.

- 7. If you are upgrading from Batch 5.1 SP1, update your formulations. To do so:
  - a. In the Recipe Editor, on the toolbar, click Formulation Parameters.
  - b. Right-click each formulation and select Update Formulation.
  - If required, provide values for the new parameters added to the updated formulations.

#### To upgrade existing EIB documents in the Work project:

- 1. Open the WorkInstruction Editor.
- 2. On the DMS menu, click Select Document Management System. The Log On Information dialog box appears.
- 3. Enter a user name and password.
- 4. Click OK.
- 5. Select an EIB in the Work project that you created in the previous version of WorkInstruction.
- 6. Click Check Out.

**NOTE:** If the Use Signature Verification for DMS Commands option is enabled in the Database Info for Audit Trail dialog box, you will also be prompted to enter a user name and password (from the iWorkUsers Windows security group) to proceed.

- Repeat steps 5-6 for each EIB in that folder that you created in the previous version of WorkInstruction.
- 8. Click Close.
- 9. On the File menu, click Open. The Open dialog box appears.
- 10. Select a file and click Open to open and convert the EIB document in the WorkInstruction Editor. As the file opens it converts to the newest version.

A message box appears asking you if you want to upgrade the rest of the EIBs in that folder.

- 11. Click Yes to continue.
- 12. On the File menu, click Save to save the EIB.
- 13. After you upgrade an EIB, you need to verify and then resave it in the WorkInstruction Editor before you check it back in (to the Work project) so that you can move it to the Production project in the DMS.

Follow the steps in the next section, <u>Steps for Moving Upgraded Files into Production</u>, before checking the files back in to the Document Management System.

### Steps for Moving Upgraded Files into Production

### ▶To verify and move the upgraded EIBs in production:

- 1. Open an upgraded EIB in the WorkInstruction Editor.
- 2. On the EIB menu, click Verify.
- 3. On the File menu, click Save.
- 4. Repeat steps 1-3 for each EIB that you created in a previous version.
- 5. When you are finished with each EIB, select Document Management System from the DMS
- 6. Select an EIB created in the previous version of WorkInstruction and click Check In. The Comment dialog box appears.
- 7. Enter a comment and click OK.

**NOTE:** If the Use Signature Verification for DMS Commands option is enabled in the Database Info for Audit Trail dialog box, you will also be prompted to enter a user name and password (from the iWorkUsers Windows security group) to proceed.

- 8. Repeat steps 6-7 for each EIB that you checked out and resaved.
- 9. When you are finished checking in each file, select the first EIB in the Work project.
- 10. Click the Copy to Production Project button. A message box appears asking you to confirm the action.
- 11. Click Yes to continue. The EIB Label dialog box appears.
- 12. Enter a label and click OK.

**NOTE:** If the Use Signature Verification for DMS Commands option is enabled, you will also be prompted to enter a user name and password (from the iWorkUsers Windows security group) to proceed.

13. Repeat steps 9-12 for each EIB in the Work folder, until all of the desired EIBs are moved into the Production project.

### **Upgrade VBIS Applications from Version 4.6 and Earlier**

The steps below explain how to upgrade VBIS from version 4.6 and earlier:

- Modifying the Batch ID and Recipe ID length in SQL Server for VBIS
- Modifying the Batch ID and Recipe ID length in Oracle for VBIS

### ▶To modify the Batch ID and Recipe ID length in SQL Server for VBIS:

- 1. Launch SQL Server Enterprise Manager.
- 2. Log in with the sa account or any login with administrative privileges.
- 3. Go to the server and database where you created the BATCH table.
- 4. Right-click the BATCH table and select Design Table.
- 5. Enter 128 in the Batch ID column and 255 in the RECIPE ID column.
- 6. Save your database table.
- 7. Repeat steps 3-6 for each table that contains the BATCH\_ID and RECIPE\_ID columns.
- 8. For the BATCHPROC\_ID, UNITPROC\_ID, UNITOPERPROC\_ID, and PHASEPROC\_ID columns, change the values to 128 in all tables that contain any of these columns.
- 9. Save and exit the Enterprise Manager.

### ▶To modify the Recipe\_ID length in Oracle for VBIS:

- 1. Launch Oracle Schema Manager.
- 2. Log in with Administrative account.
- 3. Expand tables and click on BATCH table.
- 4. Modify the Batch\_ID length by changing the number from 40 to 128.
- 5. Modify the RECIPE\_ID length by changing the number from 40 to 255.
- 6. Repeat steps 3-5 for each table that contains the BATCH\_ID and RECIPE\_ID columns.
- 7. For the BATCHPROC\_ID, UNITPROC\_ID, UNITOPERPROC\_ID, and PHASEPROC\_ID columns, change the values to 128 in all tables that contain any of these columns.

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