StreamServe Persuasion SP5

Upgrading instructions

Reference Guide

Rev A

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About upgrading to Persuasion SP5

This document contains instructions on how to upgrade from 4.x and previous versions of Persuasion to Persuasion SP5.

The upgrading instructions consists of a number of typical scenarios, where the Design Center Projects are upgraded to Persuasion SP5, and if needed, repository data is migrated to Persuasion SP5.

Upgrading from StreamServe 4.x to Persuasion SP5

*   The 4.x environment does not include RePRINT. See *RePRINT not included* on page 11.

*   The 4.x environment includes RePRINT. See *RePRINT included* on page 11.

Upgrading from Persuasion SP3 to Persuasion SP5

*   The Persuasion SP3 environment does not include any StreamStudio components. See *No StreamStudio included* on page 27.

*   The Persuasion SP3 environment includes StreamStudio Composer. See *Composer included* on page 28.

*   The Persuasion SP3 environment includes StreamStudio Collector. See *Collector included* on page 28.

Upgrading from Persuasion SP4 to Persuasion SP5

*   The Persuasion SP4 environment does not include any StreamStudio components. See *No StreamStudio included* on page 53.

*   The Persuasion SP4 environment includes StreamStudio Composer. See *Composer included* on page 53.

*   The Persuasion SP4 environment includes StreamStudio Composition Center. See *Composition Center included* on page 54.

*   The Persuasion SP4 environment includes StreamStudio Collector. See *Collector included* on page 54.

Upgrading from 3.x and 4.x earlier than 4.1.2 SP1

You cannot upgrade 3.x Design Center Projects and pre-4.1.2 SP1 Design Center Projects directly to Persuasion SP5. First you must upgrade the Project to 4.1.2 SP1, and then upgrade the 4.1.2 SP1 version to Persuasion SP5. See *Upgrading to StreamServe version 4.1.2 SP1* for instructions.

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About upgrading to Persuasion SP5

Upgrading from 4.x

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Archive Migration Tool

Documents in the RePRINT database must be migrated to a StreamServe archive in Persuasion SP5. This migration is done using Archive Migration Tool.

Tool documentation

For more information on how to use Archive Migration Tool, see the *Archive Migration Tool* user guide.

Upgrading procedures overview

The procedures involved when upgrading from 4.x to Persuasion SP5 depends on wether or not RePRINT is included in the 4.x environment:

- The 4.x environment does not include RePRINT. See *RePRINT not included* on page 11.

- The 4.x environment includes RePRINT. See *RePRINT included* on page 11.

RePRINT not included

The following steps describe how to upgrade if the 4.x environment does not include RePRINT.

	Steps	Comments
1	Configure the SP5 environment.	See the *Part A* section in *Configuring an SP5 environment* on page 12.
2	Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3	Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 14.

RePRINT included

The following steps describe how to upgrade if the 4.x environment includes RePRINT.

	Steps	Comments
1	Configure the SP5 environment.	See the *Part A* and *Part B* sections in *Configuring an SP5 environment* on page 12.
2	Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3	Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 14.
4	Migrate RePRINT documents.	See *Migrating RePRINT documents* on page 21.
5	Add document types to Design Center Projects.	See *Adding document types to Projects* on page 22.

Configuring an SP5 environment

Part A

The following applies when upgrading all types of Design Center Projects.

Connect to the enterprise repository

In Control Center, connect to the site that includes your enterprise repository. See the *Control Center* user guide for information on how to connect to a site.

Create application domains

In Control Center, create the appropriate application domains for your SP5 applications. See the *Control Center* user guide for information on how to create and configure application domains.

Create runtime repositories

You must create one runtime repository for each application domain. See the *Control Center* user guide for information on how to create runtime repositories.

Add StreamServer applications

Add the appropriate StreamServer applications to the application domains. See the *Control Center* user guide for information on how to add StreamServer applications.

Part B

The following applies when upgrading Design Center Projects that include RePRINT.

Add service gateway applications

To be able to use StreamStudio web applications in an application domain, you must add a service gateway application to the application domain. See the *Control Center* user guide for information on how to add service gateway applications.

Configure application domain for StreamStudio

In addition to the standard application domain configurations, you must also configure the application domain for StreamStudio. See the *Control Center* user guide for information on how to configure application domains for StreamStudio.

Add StreamStudio web portal

To use the StreamStudio web applications, you must add a StreamStudio web portal in Control Center. The web portal is available to all application domains in a site. Several application domains can share one web portal. See the *Control Center* user guide for information on how to add StreamStudio web portals.

Connect StreamStudio portal to application domains

You must connect the StreamStudio web portal to the application domains where you want to use the portal. See the *Control Center* user guide for information on how to connect StreamStudio web portals.

Create a StreamServe archive

In Persuasion SP5, Collector documents are stored in a StreamServe archive. This means you must create a StreamServe archive in the SP5 environment. See the *Control Center* user guide for information on how to create a StreamServe archive.

Connect StreamServe archive to application domains

You must connect the StreamServe archive to the application domains (runtime repositories) that contain the documents to archive. One StreamServe archive can be shared by several application domains. See the *Control Center* user guide for information on how to connect StreamServe archives.

Create Archiver applications

You must create Archiver applications in the SP5 application domains. The purpose of the Archiver application is to transfer documents and metadata from the runtime repository to the StreamServe archive. See the *Control Center* user guide for information on how to create Archiver applications.

Upgrading Design Center Projects

The following steps describe how to upgrade a Design Center Project.

	Steps	Comments
1	Remove multiple Platforms	If you are upgrading a 4.x Project with different Platforms for the development, test and production environment, you should only upgrade the production Platform. This means you must remove the other Platforms and Runtime configurations from the Project before you upgrade.
2	Open the Project in Design Center SP5.	When you open a Design Center Project in Design Center SP5, the Project files are automatically upgraded to SP5. The Design Center log displays information about all upgraded files, and you are prompted to save the files or cancel the upgrade.
3	Check the upgraded Project.	See *Checking the upgraded Project* on page 14.
4	Save the upgraded Project.	Save the Project and exit Design Center.

Checking the upgraded Project

After upgrading, you should verify the configuration of the upgraded Project in Design Center. See the following sections for more information:

- *Physical layers* on page 15
- *Multiple Platforms* on page 15
- *Barcodes and Intermec IPL driver* on page 16
- *Notifications* on page 16
- *Log file settings* on page 17
- *Script functions* on page 18
- *Connectors* on page 18
- *Fax drivers* on page 19
- *Profile Manager* on page 19
- *SAP features* on page 20
- *Scripts accessing data and driver resources* on page 20

Physical layers

Platform

When you upgrade a 4.x Project, the Platform is divided into one generic layer and one physical layer. See the *Design Center* documentation for more information about Platform layers.

Runtime configurations

All Runtime configurations in the Project are also divided into one generic layer and one physical layer.

Variables are cleared after each runtime job. If you have more than one runtime configuration, the variables are not available anymore in the Message for the next runtime job. The variable data must be stored in all Messages where you need the variables.

See the *Design Center* documentation for more information about Runtime configuration layers.

Additional layers for the development and test environment

The physical layer is named Production by default, and this layer is meant to be used for the Production environment. During the upgrade, a dialog box opens where you can change the name of the default physical layer.

In this dialog box, you can also select to add two additional physical layers to the Project – one for the development environment, and one for the test environment. Both these layers are copies of the upgraded Production layer.

Multiple Platforms

Only upgrade the production Platform

If you are upgrading a 4.x Project with different Platforms for the development, test and production environment, you should only upgrade the production Platform. During the upgrade, the production Platform and Runtime configurations are divided into one generic layer and one physical production layer.

The development and test Platforms

During the upgrade, a dialog box opens where you must select to add two additional physical layers to the Project – one for the development environment, and one for the test environment. Both these layers are copies of the upgraded Production layer.

After upgrading, you must edit the development and test layers. The development layer must contain the development environment specific settings, and the test layer must contain the test environment specific settings.

Additional Platforms

If the 4.x Project contains more than three Platforms (development, test, and production) you must:

• Add the additional Platforms as physical layers to the Platform in the upgraded Project. See the *Design Center* documentation for information on how to add physical layers.

• Configure the environment specific settings for each layer you add.

Barcodes and Intermec IPL driver

When upgrading a project that uses barcodes and the Intermec IPL driver, you must redesign the barcodes in PageOUT. This driver no longer uses font mapping for creation of barcodes, it uses the enable barcode functionality:

1 In PageOUT, right-click the barcode text object, and select **Barcode**. The Barcode dialog box opens.

2 Select **Enable barcodes**.

3 Select the barcode type, and set optional parameters.

Notifications

Notification settings are specified differently in StreamServe Persuasion SP5 compared to 4.x. After upgrading, you must verify that the settings are upgraded properly.

Enabling notifications

In StreamServe Persuasion SP5, you enable notifications on the Job Status tab in the Configure Platform dialog box (generic layer). To enable notifications, select **Use notifications**.

Specifying what to generate notifications for

In StreamServe Persuasion SP5, you use the Notifications tab in the Project Export Settings dialog box to specify what to generate notifications for.

Status Messenger

When upgrading from a 4.x Status Messenger Project that uses the `StatMess_MultiMessage.sxd` file, not all fields are automatically created in the output document. To upgrade the Project correctly you must:

• Re-import/add `StatMess_MultiMessage.sxd` to the resource set.

• Open the MessageIN event and import `StatMess_MultiMessage.sxd`.

• Open the process and configure the fields.

Log file settings

The log file settings in StreamServe Persuasion SP5 is not configured the same way as in 4.x. In 4.x you used startup arguments to set the following:

- Log level (`-ll`)
- Log file name (`-log`)
- Remove log file (`-rmlog`)

In StreamServe Persuasion SP5, you configure this in the Configure Platform dialog box, and you do it per physical Platform layer.

Log level

In StreamServe Persuasion SP5 there are five log level settings:

- 0 – Severe error messages.
- 1 – All error messages.
- 2 – All error and warning messages.
- 3 – All error, warning and information messages.
- 4 – All error, warning and extended information messages.

This means the log level settings are not backwards compatible.

Log file name

In StreamServe Persuasion SP5 you use the setting **Log file name** instead of the startup argument `-log`.

Remove log file

In StreamServe Persuasion SP5 you use the setting **Remove log file when server starts** instead of the startup argument `-rmlog`.

Script functions

The following script functions are not supported in StreamServe Persuasion SP5:

- `ArchiveBegin`
- `ArchiveEnd`
- `ArchiveEnable`
- `ArchiveDisable`
- `ReplaceJobIDAttribute`
- `ReplaceJobIDDateAttribute`
- `ReplaceJobIDNumAttribute`
- `StoreJobIDAttribute`
- `StoreJobIDDateAttribute`
- `StoreJobIDNumAttribute`
- `GetJobIDAttribute`
- `GetJobIDDateAttribute`
- `GetJobIDNumAttribute`
- `GetJobQueueURI`
- `GetJobQueueItemId`
- `GetJobIDJob`
- `UpdateExternalCompletionStatus`

When you start the StreamServer application, a log message for each unsupported script function is displayed in the StreamServer log.

Connectors

A number of connector types are not supported in StreamServe Persuasion SP5. In the upgraded Project, each unsupported connector is replaced by a default connector. When you open the upgraded Project in Design Center SP5, a log message for each unsupported connector is displayed in the Design Center log.

Removed input connectors

- Netware NDS
- Netware Bindery
- Exchange
- Serial
- Service Channel (COM)
- Service Channel Response (COM)

RePRINT output connector

If you used RePRINT output connectors to store documents in a RePRINT database, you must adapt your Design Center Projects to store documents in a StreamServe archive. See the *Collector* user guide for more information.

IXOS Archive in R3 output connector

If you used IXOS Archive in R3 output connectors in the old Project, these connectors are changed to LiveLink ECM output connectors. See the *Connectors* user guide for more information about the LiveLink ECM output connector.

Other removed output connectors

- Dazel
- Netware NDS
- Netware Bindery
- TFS
- TFS for MailOUT
- HTML
- SMS
- WinFaxAdapter
- Xtrade

Fax drivers

A number of fax drivers are not supported in StreamServe Persuasion SP5. In the upgraded Project, each unsupported fax driver is replaced by a default driver.

Removed fax drivers

- OMTOOL
- CommercePath
- FACSys
- FastFax
- FaxCommander
- Faxination
- Merkur
- MESSAGEManager
- VSI-Fax for Notes

Profile Manager

Profile Manager is replaced by the Dispatcher web application. This means Profile Manager solutions are not upgraded.

SAP features

E-docs incparam file

In 4.x, the `incparam` file was not included as a resource in Design Center.

In Persuasion SP5, the `incparam` file must be imported to the appropriate resource set in Design Center. The resource type for this file must be `RDI Settings`.

Scripts accessing data and driver resources

In Persuasion SP5, each physical layer has its own working directory. The `data` and `driver` directories are moved up one level in the directory hierarchy, and are shared by all working directories (`DEV`, `TEST`, etc.)
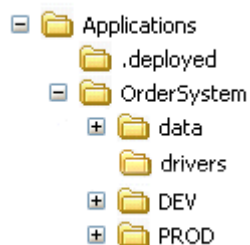
Figure 1   Directory structure in Persuasion SP5.

If you use scripting to access files in these directories, you must edit the paths in your scripts. The recommendation is to use relative paths.

Migrating RePRINT documents

Archive Migration Tool is a wizard that leads you through the configuration of the migration. At the end of the wizard, you start the migration.

> If you need to migrate large volumes of documents, you can split the migration into separate chunks, for example by document type.

To migrate RePRINT documents

1   Select **Start** > **All Programs** > **StreamServe Persuasion** > **Utilities** > **Archive Migration Tool**. The Archive Migration Tool opens.

2   Select **RePRINT** and click **Next**.

3   Select **Create new migration** and click **Next**.

4   Specify the appropriate connection settings to the RePRINT database and click **Next**.

5   Specify which documents to migrate:

   •   **Document type** – select one or all document types.

   •   **Date column** – select the appropriate date index to use in the document search. Select **time_of_creation** if you are going to migrate all document types.

   •   **Start date** – start date index of documents to migrate.

   •   **Stop date** – stop date index of documents to migrate.

6   Click **Next**.

7   Specify the appropriate connection settings to the StreamServe archive and click **Next**.

8   Click **Start** to start the migration.

To resume an interrupted document migration

This procedure is similar to starting a new migration. The difference is that you must select the option **Resume aborted migration** instead of **Create new migration**, and browse to:

`<User profile>\My Documents\StreamServe Migration\<Date>_<Time>`

This folder contains the file `migrated_records.txt` that is used by Archive Migration Tool when resuming an interrupted migration.

To migrate documents that failed

This procedure is similar to starting a new migration. The difference is that you must select the option **Migrate failed documents** instead of **Create new migration**, and browse to:

`<User profile>\My Documents\StreamServe Migration\<Date>_<Time>`

This folder contains the file `failed_records.txt` that is used by Archive Migration Tool when trying to migrate documents that failed.

Adding document types to Projects

To be able to store documents in a StreamServe archive, you must add document type and metadata group resources to your Design Center Projects.

Create a global resource set for document types and metadata

You must create a global resource set for all document types and metadata groups used within an organization. This ensures that all document types, metadata groups, and metadata are unique.

To create a global resource set, you can create a separate Design Center Project, and create the global resource set in this Project.

Connect the global resource set to the Design Center Projects

When you have created the global resource set (empty at this stage), you must add it to your Design Center Projects:

1 In Design Center, select **File** > **Add to Project**. The Add to Project dialog box opens.

2 Click **Browse**. A file browser opens.

3 Browse to and select the global resource set. The global resource set is added to the Project.

Add document types to the global resource set

The document types and metadata to use are the ones specified in the document types file (`*.xml`) generated during the migration from the RePRINT database to the StreamServe archive. You will find this document types file in:

```
<StreamServe installation>\StreamServe\Applications\Archive
Migration Tool
```

1 In Design Center, right-click the global resource set and select **Synchronize Document Types**. A file browser opens.

2 Select **Resources** > **Synchronize Document Types**. A file browser opens.

3 Browse to:
```
<StreamServe installation>\StreamServe\Applications\Archive
Migration Tool
```

4 Select `migration_document_types.xml` and click **Open**. The document types and metadata groups defined in the xml are added to the resource set.

Assign document types to output documents

To be able to store documents in a StreamServe archive, you must connect the appropriate document types to the output connectors (in Runtime configuration) that stores documents in the StreamServe archive.

1   Connect the global resource set to the Runtime configurations that includes the output connectors that stores documents in the StreamServe archive.

2   For each output connector, specify how to store documents in the StreamServe archive. See the *Collector* user guide for more information.

Upgrading from Persuasion SP3

In this chapter

Upgrading tools

Database Administration Tool

You use Database Administration Tool to migrate Composer and Composition Center resources. This tool is also used to clean up GUIDs in the StreamServe archive when migrating Collector documents.

Tool documentation

For more information on how to use Database Administration Tool, see the *Database Administration Tool* user guide.

Archive Migration Tool

You use the Archive Migration Tool to prepare the SP3 runtime repository for migration and to generate a configuration file to be used during the migration. The file contains information about the document types to be migrated.

Note: The Archive Migration Tool does not perform the actual migration.

Tool documentation

For more information on how to use Archive Migration Tool, see the *Archive Migration Tool* user guide.

Consolidation of Collector and RePRINT

If you have a Persuasion SP3 Collector environment in parallel with a 3.x/4.x RePRINT environment, and you want to consolidate these archives to a single SP5 Collector archive, you must migrate the Collector documents before you migrate the RePRINT documents. See for information.

You must migrate the Collector documents before you migrate the RePRINT documents.

DocTypeMigrator

DocTypeMigrator synchronizes document type GUIDs (Globally Unique Identifiers) in Design Center, runtime repository, and StreamServe archive. The DocTypeMigrator executable (`DocTypeMigrator.exe`) is installed in:

```
<StreamServe_installation>\Applications\StreamServer\
<version>\Tools\System\
```

Upgrading procedures overview

The procedures involved when upgrading from Persuasion SP3 to Persuasion SP5 depends on what is included in the Persuasion SP3 environment:

• The Persuasion SP3 environment does not include any StreamStudio components. See *No StreamStudio included* on page 27.

• The Persuasion SP3 environment includes StreamStudio Composer. See *Composer included* on page 28.

• The Persuasion SP3 environment includes StreamStudio Collector. See *Collector included* on page 28.

Composition Center

Please contact StreamServe for assistance if the Persuasion SP3 environment includes StreamStudio Composition Center.

No StreamStudio included

The following steps describe how to upgrade if the Persuasion SP3 environment does not include any StreamStudio components.

	Steps	Comments
1	Configure the SP5 environment.	See the *Part A* section in *Configuring an SP5 environment* on page 29
2	Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3	Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 31.

Composer included

The following steps describe how to upgrade if the Persuasion SP3 environment includes StreamStudio Composer.

Steps	Comments
1 Configure the SP5 environment.	See the *Part A* and *Part B* sections in *Configuring an SP5 environment* on page 29.
2 Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3 Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 31.
4 Migrate Composer resources	See *Migrating Composer resources* on page 34.

Collector included

The following steps describe how to upgrade if the Persuasion SP3 environment includes StreamStudio Collector.

Steps	Comments
1 Configure the SP5 environment.	See the *Part A*, *Part B*, and *Part C* sections in *Configuring an SP5 environment* on page 29.
2 Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3 Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 31.
4 Migrate Collector documents	See *Migrating SP3 Collector documents* on page 35.

Configuring an SP5 environment

Part A

The following applies when upgrading all types of Design Center Projects.

Connect to the enterprise repository

In Control Center, connect to the site that includes your enterprise repository. See the *Control Center* user guide for information on how to connect to a site.

Create application domains

In Control Center, create the appropriate application domains for your SP5 applications. See the *Control Center* user guide for information on how to create and configure application domains.

Create runtime repositories

You must create one runtime repository for each application domain. See the *Control Center* user guide for information on how to create runtime repositories.

Add StreamServer applications

Add the appropriate StreamServer applications to the application domains. See the *Control Center* user guide for information on how to add StreamServer applications.

Part B

The following applies when upgrading Design Center Projects that include any StreamStudio components.

Add service gateway applications

To be able to use StreamStudio web applications in an application domain, you must add a service gateway application to the application domain. See the *Control Center* user guide for information on how to add service gateway applications.

Configure application domain for StreamStudio

In addition to the standard application domain configurations, you must also configure the application domain for StreamStudio. See the *Control Center* user guide for information on how to configure application domains for StreamStudio.

Add StreamStudio web portal

To use the StreamStudio web applications, you must add a StreamStudio web portal in Control Center. The web portal is available to all application domains in a site. Several application domains can share one web portal. See the *Control Center* user guide for information on how to add StreamStudio web portals.

Connect StreamStudio portal to application domains

You must connect the StreamStudio web portal to the application domains where you want to use the portal. See the *Control Center* user guide for information on how to connect StreamStudio web portals.

Part C

The following applies when upgrading Design Center Projects that include StreamStudio Collector.

Create a StreamServe archive

In Persuasion SP5, Collector documents are stored in a StreamServe archive. This means you must create a StreamServe archive in the SP5 environment. See the *Control Center* user guide for information on how to create a StreamServe archive.

Connect StreamServe archive to application domains

You must connect the StreamServe archive to the application domains (runtime repositories) that contain the documents to archive. One StreamServe archive can be shared by several application domains. See the *Control Center* user guide for information on how to connect StreamServe archives.

Create Archiver applications

You must create Archiver applications in the SP5 application domains. The purpose of the Archiver application is to transfer documents and metadata from the runtime repository to the StreamServe archive. See the *Control Center* user guide for information on how to create Archiver applications.

Upgrading Design Center Projects

The following steps describe how to upgrade a Design Center Project.

	Steps	Comments
1	Open the Project in Design Center SP5.	When you open a Design Center Project in Design Center SP5, the Project files are automatically upgraded to SP5. The Design Center log displays information about all upgraded files, and you are prompted to save the files or cancel the upgrade.
		Note: This step can take a long time, as global metadata is re-mapped to shared metadata in SP5.
2	Check the upgraded Project.	See *Checking the upgraded Project* on page 31.
3	Save the upgraded Project.	Save the Project and exit Design Center.

Checking the upgraded Project

After upgrading, you should verify the configuration of the upgraded Project in Design Center. See the following sections for more information:

- *Connectors* on page 31.
- *Document types* on page 32.

Connectors

IXOS Archive in R3 output connector

If you used IXOS Archive in R3 output connectors in the SP3 Project, these connectors are changed to LiveLink ECM output connectors in SP5. See the *Connectors* user guide for more information about the LiveLink ECM output connector.

Collector Reprocess input connector

If you used Collector Reprocess input connectors in the SP3 Project, you must manually change these connectors to Service Request input connectors. See the *Connectors* user guide for more information about the Service Request input connector.

Document types

Create a global resource set for document types and metadata

You must create a global resource set for all document types and metadata groups used within an organization. This ensures that all document types, metadata groups, and metadata are unique.

To create a global resource set, you can create a separate Design Center Project, and create the global resource set in this Project.

Connect the global resource set to the Design Center Projects

When you have created the global resource set, you must add it to your Design Center Projects:

1 In Design Center, select **File** > **Add to Project**. The Add to Project dialog box opens.

2 Click **Browse**. A file browser opens.

3 Browse to and select the global resource set. The global resource set is added to the Project.

4 Connect the global resource set to the appropriate Message and Runtime configurations in the Project.

Add document type resources to the global resource set

You must generate a document types file (`*.xml`) that includes all document types and metadata used in your Design Center Projects, and then import this file to the global resource set. This will create all document type and metadata group resources in the global resource set.

1 Export and deploy the upgraded (SP5) Design Center Projects that contain the document types you need. Do **NOT** start the StreamServer applications.

2 In Control Center, right-click the application domain node and select **Retrieve Document Types File**. A file browser opens.

3 Specify the path and click **Save**.

4 In Design Center, right-click the global resource set and select **Synchronize Document Types**. A file browser opens.

5 Specify the path to the document types file and click **Open**. The document type and metadata group resources are added to the global resource set.

Connect document types to Messages and output connectors

When you have added all document type resources to the global resource set, you must replace the old document type resources connected to Messages and output connectors with the new document type resources in the global resource set.

Remove the old document type resources

When you have replaced the document type resources, you can remove the old document type resources and metadata group resources from your Projects.

Enabling metadata in reusable Composition Center resources

If metadata is used in reusable Composition Center resources (text and rules), you must connect the metadata group that contains the metadata to all document types used in Composition Center. In this circumstance it is recommended to select the option **Auto-apply to all Document types** when you share the metadata group to document type resources.

1 Open the metadata group resource.

2 Click **Share**.

3 Select **Auto-apply to all Document types** and click **OK**.

This replaces the previous **Metadata are global** option.

Migrating Composer resources

The following steps describe how to migrate Composer resources from the SP3 runtime repository to the SP5 runtime repository.

	Steps	Comments
1	Export the Composer resources from the SP3 runtime repository.	Use Database Administration Tool to export Composer resources and security data from the SP3 runtime repository to a ZIP file. See *Exporting Composer resources* on page 34.
2	Import Composer resources to SP5 Runtime repository.	Use Database Administration Tool to import Composer resources and security data from the ZIP file to the SP5 runtime repository. See *Importing Composer resources* on page 34.

Exporting Composer resources

Use Database Administration Tool to export Composer resources and security data (roles, permissions, etc.) from the SP3 runtime repository to a ZIP file. This ZIP file is used as source when importing the resources to the SP5 runtime repository. Contact StreamServe Support for information on how to export data from earlier versions of Persuasion runtime repositories.

Note: Jobs must be finished, and queues must be empty before you export.

To export Composer resources

1 Start Database Administration Tool and connect to the SP3 runtime repository.

2 Click the **Runtime Repository** button.

3 In the **Export to** field, specify the path to the ZIP file.

4 Select to include the **Security** and **Composer** areas and click **Export**. The resources are exported to the ZIP file.

Importing Composer resources

Use Database Administration Tool to import Composer resources and security data (roles, permissions, etc.) from the ZIP file to the SP5 runtime repository.

To import Composer resources

1 Start Database Administration Tool and connect to the SP5 runtime repository.

2 Click the **Runtime Repository** button.

3 In the **Import from** field, specify the path to the ZIP file.

4 Click **Import**. The resources are imported from the ZIP file.

Migrating SP3 Collector documents

If the SP3 environment includes StreamStudio Collector, documents are archived in the SP3 runtime repository. In SP5 these documents must be migrated to a StreamServe archive.

Consolidation of Collector and RePRINT

If you have a Persuasion SP3 Collector environment in parallel with a 3.x/4.x RePRINT environment, and you want to consolidate these archives to a single SP5 Collector archive, you must migrate the Collector documents before you migrate the RePRINT documents. See *Migrating RePRINT documents* on page 21 for information.

You must migrate the Collector documents before you migrate the RePRINT documents.

Migration tracks

You can follow different tracks when you migrate Collector documents. Which track to follow depends on the downtime allowed in the SP3 environment. The recommendation is to close down the SP3 environment, perform the migration and SP5 deployment, and finally start the new SP5 environment. However, this may not always be possible. Before you migrate Collector documents, you must therefore find the answers to the following questions:

• Can the SP3 environment be shut down during migration?

   Note: "Shut down" means "stop using forever".

• Can I wait until migration is completed before I start using the SP5 environment?

The answers to these questions determine which track to follow. See the table below.

If you...	You must follow this track...
• **Can** shut down the SP3 environment when you migrate the documents. • **Can** wait until migration is completed before you start using the SP5 environment.	**1** Run a full migration. See *Full migration of an SP3 runtime repository* on page 36. **2** Deploy. See *SP5 deployment after migration* on page 43.

If you...	You must follow this track...
• **Can** shut down the SP3 environment when you migrate the documents. • **Cannot** wait until migration is completed before you start using the SP5 environment.	**1** Run a full migration. See *Full migration of an SP3 runtime repository* on page 36. **2** Deploy. See *SP5 deployment during migration* on page 46.

If you...	You must follow this track...
• **Cannot** shut down the SP3 environment when you migrate the documents. • **Can** wait until migration is completed before you start using the SP5 environment.	**1** Run a full migration. See *Full migration of an SP3 runtime repository* on page 36. **2** Run an incremental migration. See *Incremental migration of additional SP3 documents* on page 40. **3** Deploy. See *SP5 deployment after migration* on page 43.

If you...	You must follow this track...
• **Cannot** shut down the SP3 environment when you migrate the documents. • **Cannot** wait until migration is completed before you start using the SP5 environment.	**1** Run a full migration. See *Full migration of an SP3 runtime repository* on page 36. **2** Run an incremental migration. See *Incremental migration of additional SP3 documents* on page 40. **3** Deploy. See *SP5 deployment during migration* on page 46.

Full migration of an SP3 runtime repository

Steps included

- *Step 1 – Create a copy of the SP3 runtime repository* on page 37.
- *Step 2 – Create a Migration archive* on page 37.
- *Step 3 – Prepare the SP3 runtime repository* on page 37.
- *Step 4 – Create an application domain for migration* on page 38.
- *Step 5 – Create an Archiver application for migration* on page 38.
- *Step 6 – Define document types to be used* on page 39.
- *Step 7 – Migrate the documents* on page 39.

Step 1 – Create a copy of the SP3 runtime repository

You perform a full migration on a copy of the SP3 runtime repository. This means the original SP3 runtime repository can still be used in the SP3 environment while the already archived documents are migrated from the repository copy.

If the SP3 environment is up and running during the migration period, new documents may be archived in the original SP3 runtime repository. These documents must be migrated using incremental migration, see *Incremental migration of additional SP3 documents* on page 40.

To create a copy of the SP3 runtime repository

1   Make a complete backup of the SP3 runtime repository.

2   Restore the backup of the SP3 runtime repository, using a different database name or a different location.

Step 2 – Create a Migration archive

The Migration archive is the target for the migrated documents.

To create a Migration archive

1   Open Control Center and create a StreamServe archive.

2   Open the DBMS (Database Management System) for the database server and adjust the following database properties:

- Make the StreamServe archive the same size as the SP3 runtime repository.

- Place the database files on the most suitable disks.

- Adjust the logging level to a minimum.

- Disable backup routines.

- Optimize for writing to disk.

Step 3 – Prepare the SP3 runtime repository

You use the Archive Migration Tool to prepare the SP3 runtime repository for migration and to generate a document types file to be used during the migration. The document types file contains information about the document types to be migrated.

To prepare the SP3 runtime repository

1   Open the Archive Migration Tool.

2   Select **Collector** as the migration source.

3   Specify the copy of the SP3 runtime repository as the source database.

4   Specify the Migration archive as the target database.

5   Click **Start**.

The SP3 runtime repository is upgraded to SP5 and the document types file (`migration_document_types.xml`) is created in the following directory:

```
<StreamServe installation>\StreamServe\Applications\Archive
Migration Tool
```

Step 4 – Create an application domain for migration

You use a dedicated application domain for migration. This application domain must include at least one Archiver application that performs the actual migration. The application domain must use the upgraded SP3 runtime repository, and must be linked to the Migration archive.

Prerequisites

You must have full access (user name and password) to the upgraded SP3 runtime repository. If you do not know the user name or password, you can access the repository as an administrator user.

To create an application domain for migration

1 In Control Center, create a new application domain.

2 Open the Application Domain Editor and specify the upgraded SP3 runtime repository as runtime repository.

3 Link the Migration archive to the application domain for migration.

Step 5 – Create an Archiver application for migration

You must create and configure at least one Archiver application in the application domain for migration. The Archiver application will perform the actual migration.

> You get the most control if you migrate one document type at a time.
>
> Create an Archiver application for each document type and let the applications work in parallel or in sequence. The total throughput will not increase, but you may gain some processing time.

To create an Archiver application

1 In Control Center, create a new Archiver application in the application domain for migration.

2 Right-click the Archiver application and select **Configuration**. The Configuration dialog box opens.

3 Add a new **Migration** task and configure the following:

- **Name** – enter the appropriate name.

- • **Document type** – select document type (**All** if one Archiver application is used, or **<*document type*>** if several Archiver applications are used).

- • Keep the other default settings.

Step 6 – Define document types to be used

The Archiver application running the migration task needs information about the document types of the documents to be migrated. This information is provided by the migration_document_types.xml file, created by the Archive Migration Tool (see *Step 3 – Prepare the SP3 runtime repository* on page 37).

You must copy the file to the working directory of the Archiver application.

To define the document types

1 In your file management system, copy migration_document_types.xml from the Archive Migration Tool working directory:

```
<StreamServe installation>\StreamServe\Applications\Archive
Migration Tool
```

2 Paste the file into the working directory of the Archiver application. For example:

```
C:\ManagementGateway\1.0\root\application\<Archiver>
```

Step 7 – Migrate the documents

Now you can start the migration.

Before you start, you should set a high log level to verify that all works fine. If everything is OK, you should decrease the log level in order to save CPU and disk.

To migrate documents

1 In Control Center, open the Archiver configuration dialog box and set the log level to 3.

2 Start the Archiver application.

3 Check the Archiver log to verify that all is OK.

4 If all is OK, change the log level to 2 and let the job continue.

The Archiver application now performs the configured migration task and the SP3 documents are migrated to the Migration archive.

To monitor the migration

There are several ways to monitor a migration. For example, you can execute a query regularly to count the documents in the archive.

You can use the Windows Task Manager (or a similar tool) to monitor the CPU load and the memory usage during the migration. For the CPU load on the database server, you want the database server to use as much as possible from as many processor cores as possible.

By default, an Archiver application migrates 100 documents at a time (segment size), using 10 threads. Depending on the server hardware, you may want to adjust these parameters.

Monitor the CPU load and the memory usage. If you experience that the hardware is under-utilized, try a substantially higher value for the segment size, for example 3000. You change the segment size setting in the advanced configuration of the Archiver application.

Incremental migration of additional SP3 documents

In this scenario, a full snapshot of the SP3 runtime repository has already been migrated (see *Full migration of an SP3 runtime repository* on page 36).

You must now migrate any additional SP3 documents that have been archived after the full migration was performed.

Steps included

- *Step 1 – Stop the SP3 environment* on page 40.
- *Step 2 – Create a repository for incremental migration* on page 41.
- *Step 3 – Prepare the repository for incremental migration* on page 41.
- *Step 4 – Copy the DocumentLock table* on page 41.
- *Step 5 – Copy the DocumentTransferStatus table* on page 42.
- *Step 6 – Update the application domain for migration* on page 42.
- *Step 7 – Migrate the documents* on page 42.

Step 1 – Stop the SP3 environment

Before you do anything else, you must stop the SP3 environment to make sure no new documents are archived during the migration.

To stop the SP3 environment

In Control Center, stop all running applications in the SP3 environment.

Step 2 – Create a repository for incremental migration

You need a new copy of the SP3 runtime repository to be used in the incremental migration. Since the SP3 runtime repository copy used in the full migration is also used in the incremental migration, you must have access to both these repositories at the same time.

Comments

From now on, the SP3 runtime repository copy used in full migration is called **full repository**, and the SP3 runtime repository copy used in incremental migration is called **incremental repository**.

To create an incremental repository

1 Make a new complete backup of the SP3 runtime repository.

2 Restore the backup repository to a different database name than the backup repository for full migration.

Step 3 – Prepare the repository for incremental migration

You use Archive Migration Tool to prepare the incremental repository for migration and to generate a document types file to be used during the migration. The document types file contains information about the document types to be migrated.

To prepare the incremental repository

1 Open Archive Migration Tool.

2 Select **Collector** as the migration source.

3 Specify the incremental repository as the source database.

4 Specify the Migration archive as the target database.

5 Click **Start**.

The incremental repository is upgraded to SP5 and a document types file (`migration_document_types.xml`) is created in the following directory:

```
<StreamServe installation>\StreamServe\Applications\Archive
Migration Tool
```

Step 4 – Copy the DocumentLock table

The incremental repository must have the same `DocumentLock` table as the full repository. This means you must copy the contents of this table from the full repository to the incremental repository.

To copy the DocumentLock table

The `DocumentLock` table contains one single row with data. In the DBMS, you can copy the row from the full repository and paste it into the `DocumentLock` table in the incremental repository.

Step 5 – Copy the DocumentTransferStatus table

During an incremental migration, the Archiver finds all documents (that is, all documents that are already migrated during the full migration and all additional SP3 documents that are yet not migrated).

By copying the contents of the `DocumentTransferStatus` table from the full repository to the incremental repository, you make the Archiver application aware of which documents are already migrated. The Archiver application will then only migrate the additional SP3 documents during the incremental migration.

Note: There is a duplicate check when the documents are inserted into the new StreamServe archive, ensuring that each document is only archived once.

To copy the DocumentTransferStatus table

In your DBMS, use the proper feature (for example, the Import feature for SQL Server) to copy all rows from the `DocumentTransferStatus` table in the full repository to the `DocumentTransferStatus` table in the incremental repository.

Step 6 – Update the application domain for migration

When you run the incremental migration, you can use the same dedicated application domain and the same Archiver application as you used in the full migration. However, before you start the migration, you must change the runtime repository from the full repository to the incremental repository.

Note: If you create a new application domain, you must connect the application domain to the same StreamServe archive as in the full migration.

To change the runtime repository

1   In Control Center, open the Application Domain Editor for the application domain.

2   Change the runtime repository to the incremental repository.

Step 7 – Migrate the documents

In Control Center, start the Archiver application. The Archiver application spends a few minutes analyzing the `DocumentTransferStatus` table, and then migrates the additional SP3 documents to the SP5 StreamServe archive.

When the migration is finished, all SP3 documents have been migrated and the SP3 environment can be permanently shut down.

SP5 deployment after migration

Use this scenario when you do not need to start using Persuasion SP5 until all of SP3 documents are migrated into the SP5 StreamServe archive.

Steps included

- *Step 1 – Synchronize GUIDs* on page 43.

- *Step 2 – Export Design Center Projects* on page 44.

- *Step 3 – Prepare the SP5 environment* on page 44.

- *Step 4 – Deploy export files to StreamServer applications* on page 44.

- *Step 5 – Clean up GUIDs in the Migration archive* on page 45.

- *Step 6 – Connect the Migration archive to the SP5 application domain* on page 45.

- *Step 7 – Verify the solution* on page 45.

Step 1 – Synchronize GUIDs

Use the DocTypeMigrator tool to replace the GUIDs in the upgraded Projects with those extracted from the SP3 runtime repository by the Archive Migration Tool (see *Step 3 – Prepare the SP3 runtime repository* on page 37). This will replace all GUIDs in the Projects, re-using as many of the SP3 GUIDs as possible.

Note: The DocTypeMigrator tool implements the SP4 model for metadata. If you wish to use any other model, you must modify the GUIDs manually. Contact StreamServe Support for instructions.

To run DocTypeMigrator

Use the following syntax to run DocTypeMigrator:

```
DocTypeMigrator ProjectPath DocumentTypePath -UPGRADE
```

ProjectPath	The path to the Design Center Project(s).
	If the path includes several Projects (in sub-directories), all Projects are affected.
DocumentTypePath	The path to migration_document_types.xml:
	`<StreamServe installation>\StreamServe\Applications\` `Archive Migration Tool\migration_document_types.xml`

To check errors and warnings

Errors and warnings are logged to the command prompt.

Message when incorrect ProjectPath is specified
`Could not open path to DesignCenter project folder <path>` `Upgrade finished, there were errors, check the log`

Message when incorrect DocumentTypePath is specified
Could not find the DocumentType file *\<path\>*
Upgrade finished, there were errors, check the log

Message when DocumentTypePath is specified as folder
Could not read the DocumentType file *\<path\>*
Upgrade finished, there were errors, check the log

Messages when resources could not be opened in Read/Write
Could not open resource: *\<path\>*
Could not open resource: *\<path\>*
Upgrade finished, there were warnings, check the log

Step 2 – Export Design Center Projects

Open and export all Design Center Projects. Before you export you can verify that the GUIDs are updated correctly. To do this, you can open the document type resources and compare GUIDs in the resource editor with the corresponding GUIDs in the document type xml extracted from the SP3 runtime repository.

Step 3 – Prepare the SP5 environment

In your SP5 environment, make sure you have an Archiver application that handles all document types. See *Part C* in *Configuring an SP5 environment* on page 29.

Step 4 – Deploy export files to StreamServer applications

Deploy the exported Design Center Projects to the corresponding StreamServer applications.

> ⚠️ Do not start the StreamServer applications at this stage. If you do, you will damage the runtime repository.

When you have deployed the last Project you must locate the document_types.xml generated by the deployment. You will find it in the working directory of the StreamServer application to which the last Project was deployed. This file is used in the next step to clean up GUIDs in the StreamServe archive.

Actions

1 In Control Center, deploy the first Project to its StreamServer application.

Note: Do **not** start the StreamServer application at this stage!

2 Deploy all other Projects.

Note: Do **not** start the StreamServer application at this stage!

3 Locate `document_types.xml`.

Step 5 – Clean up GUIDs in the Migration archive

It is very important that you clean up the GUIDs in the Migration archive. The cleaned-up Migration archive can then be used in the SP5 environment.

To clean up the GUIDs

1 Make a backup of the Migration archive.

2 Open Database Administration Tool and connect to the Migration archive.

3 Click the **Metadata** button and load the `document_types.xml` (see the previous procedure).

4 Inspect the proposed changes and apply them.

Step 6 – Connect the Migration archive to the SP5 application domain

When you have cleaned up the GUIDs in the Migration archive, you can connect it to the SP5 application domain.

To connect the Migration archive to the SP5 application domain

In Control Center, connect the Migration archive to the SP5 application domain.

Step 7 – Verify the solution

1 Start the StreamServer and Archiver applications and run the Projects.

2 Process and archive a few documents.

3 Verify that the documents are properly archived in the Migration archive.

You now have an SP5 StreamServe archive that contains all your SP3 Collector documents and is ready to be filled with new SP5 documents.

SP5 deployment during migration

Use this scenario if you must start using Persuasion SP5 while the migration of the SP3 documents is still in progress.

Included steps

- *Step 1 – Synchronize GUIDs* on page 46.

- *Step 2 – Export Design Center Projects* on page 47.

- *Step 3 – Prepare the SP5 environment* on page 47.

- *Step 4 – Create a new StreamServe archive* on page 47.

- *Step 5 – Deploy export files to StreamServers* on page 48.

- *Step 6 – Start StreamServer applications and archiver* on page 48.

- *Step 7 – Merge the StreamServe archives* on page 48.

- *Step 8 – Verify the solution* on page 49

Step 1 – Synchronize GUIDs

Use the DocTypeMigrator tool to replace the GUIDs in the upgraded Projects with those extracted from the SP3 runtime repository by the Archive Migration Tool (see *Step 3 – Prepare the SP3 runtime repository* on page 37). This will replace all GUIDs in the Projects, re-using as many of the SP3 GUIDs as possible.

Note: The DocTypeMigrator tool implements the SP4 model for metadata. If you wish to use any other model, you must modify the GUIDs manually. Contact StreamServe Support for instructions.

To run DocTypeMigrator

Use the following syntax to run DocTypeMigrator:

```
DocTypeMigrator ProjectPath DocumentTypePath -UPGRADE
```

`ProjectPath`	The path to the Design Center Project(s).
	If the path includes several Projects (in sub-directories), all Projects are affected.
`DocumentTypePath`	The path to `migration_document_types.xml`:
	`<StreamServe installation>\StreamServe\Applications\ Archive Migration Tool\migration_document_types.xml`

To check errors and warnings

Errors and warnings are logged to the command prompt.

Message when incorrect ProjectPath is specified
`Could not open path to DesignCenter project folder <path>`
`Upgrade finished, there were errors, check the log`

Message when incorrect DocumentTypePath is specified

```
Could not find the DocumentType file <path>
Upgrade finished, there were errors, check the log
```

Message when DocumentTypePath is specified as folder

```
Could not read the DocumentType file <path>
Upgrade finished, there were errors, check the log
```

Messages when resources could not be opened in Read/Write

```
Could not open resource: <path>
Could not open resource: <path>
Upgrade finished, there were warnings, check the log
```

Step 2 – Export Design Center Projects

Open and export all Design Center Projects. Before you export you can verify that the GUIDs are updated correctly. To do this, you can open the document type resources and compare GUIDs in the resource editor with the corresponding GUIDs in the document type xml extracted from the SP3 runtime repository.

Step 3 – Prepare the SP5 environment

In your SP5 environment, make sure you have an Archiver application that handles all document types. See *Part C* in *Configuring an SP5 environment* on page 29.

Step 4 – Create a new StreamServe archive

Since migration to the Migration archive is in progress, you need a new SP5 StreamServe archive that is independent of the migration in progress. The Migration archive and this new SP5 archive will later be merged. In the instructions below, this new SP5 StreamServe archive is referred to as the New archive.

To create a new StreamServe archive

1   In Control Center, create the New archive.

2   Link the New archive to the SP5 application domain.

Step 5 – Deploy export files to StreamServers

Deploy the exported Design Center Projects to the corresponding StreamServer applications (in the SP5 application domain).

To deploy the export files

1 In Control Center, deploy the first Project to its StreamServer application.

2 Deploy all other Projects.

Step 6 – Start StreamServer applications and archiver

Now you can start the StreamServer applications and the Archiver application.

Actions

1 In Control Center, start the StreamServer applications.

2 Start the Archiver application.

3 Process and archive a few documents and verify that they end up in the New archive.

Now you have an SP5 StreamServe archive that is ready to be filled with SP5 documents. Your SP5 StreamServer applications can be up and running and archive documents in the New archive while migration to the Migration archive is in progress.

Step 7 – Merge the StreamServe archives

The New archive contains the GUIDs required in the Persuasion SP5 environment. You must consider whether to merge the Migration archive into the New archive or vice versa:

• If you copy the documents *from* the Migration archive *to* the New archive, you do not have to modify the GUIDs.

• If you copy the documents *from* the New archive *to* the Migration archive, the GUIDS in the Migration archive must be cleaned up. See *Step 5 – Clean up GUIDs in the Migration archive* on page 45.

To merge the StreamServe archives

1 When it fits your schedule, stop the StreamServer applications running the upgraded Projects.

2 In your DBMS, use the proper feature (for example, the Import feature for SQL Server) to merge the StreamServe archives.

Step 8 – Verify the solution

1   Start the StreamServer applications and run the Projects.

2   Process and archive a few documents.

3   Verify that the documents are properly archived.

Upgrading from Persuasion SP4

In this chapter

Upgrading tools

Database Administration Tool

You use Database Administration Tool to:

- Migrate Composer resources from the SP4 runtime repository to the SP5 runtime repository.
- Migrate security data from the SP4 runtime repository to the SP5 runtime repository.
- Migrate Composition Center resources from the SP4 web content repository to the SP5 web content repository.

Tool documentation

For more information on how to use Database Administration Tool, see the *Database Administration Tool* user guide.

Upgrading procedures overview

The procedures involved when upgrading from Persuasion SP4 to Persuasion SP5 depends on what is included in the Persuasion SP4 environment:

• The Persuasion SP4 environment does not include any StreamStudio components. See *No StreamStudio included* on page 53.

• The Persuasion SP4 environment includes StreamStudio Composer. See *Composer included* on page 53.

• The Persuasion SP4 environment includes StreamStudio Composition Center. See *Composition Center included* on page 54.

• The Persuasion SP4 environment includes StreamStudio Collector. See *Collector included* on page 54.

No StreamStudio included

The following steps describe how to upgrade if the Persuasion SP4 environment does not include any StreamStudio components.

Steps	Comments
1 Configure the SP5 environment.	See the *Part A* section in *Configuring an SP5 environment* on page 55
2 Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3 Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 57.

Composer included

The following steps describe how to upgrade if the Persuasion SP4 environment includes StreamStudio Composer.

Steps	Comments
1 Configure the SP5 environment.	See the *Part A* and *Part B* sections in *Configuring an SP5 environment* on page 55.
2 Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3 Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 57.
4 Migrate Composer resources	See *Migrating Composer resources* on page 60.

Composition Center included

The following steps describe how to upgrade if the Persuasion SP4 environment includes StreamStudio Composer.

	Steps	Comments
1	Configure the SP5 environment.	See the *Part A*, *Part B*, and *Part C* sections in *Configuring an SP5 environment* on page 55.
2	Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3	Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 57.
4	Migrate Composition Center resources	See *Migrating Composition Center resources* on page 61.

Collector included

The following steps describe how to upgrade if the Persuasion SP4 environment includes StreamStudio Collector.

	Steps	Comments
1	Configure the SP5 environment.	See the *Part A*, *Part B*, and *Part D* sections in *Configuring an SP5 environment* on page 55.
2	Backup Design Center Projects.	Backup all Design Center Project files before you upgrade the Design Center Projects.
3	Upgrade Design Center Projects.	See *Upgrading Design Center Projects* on page 57.

Configuring an SP5 environment

Part A

The following applies when upgrading all types of Design Center Projects.

Connect to the enterprise repository

In Control Center, connect to the site that includes your enterprise repository. See the *Control Center* user guide for information on how to connect to a site.

Create application domains

In Control Center, create the appropriate application domains for your SP5 applications. See the *Control Center* user guide for information on how to create and configure application domains.

Create runtime repositories

You must create one runtime repository for each application domain. See the *Control Center* user guide for information on how to create runtime repositories.

Add StreamServer applications

Add the appropriate StreamServer applications to the application domains. See the *Control Center* user guide for information on how to add StreamServer applications.

Part B

The following applies when upgrading Design Center Projects that include any StreamStudio components.

Add service gateway applications

To be able to use StreamStudio web applications in an application domain, you must add a service gateway application to the application domain. See the *Control Center* user guide for information on how to add service gateway applications.

Configure application domain for StreamStudio

In addition to the standard application domain configurations, you must also configure the application domain for StreamStudio. See the *Control Center* user guide for information on how to configure application domains for StreamStudio.

Add StreamStudio web portal

To use the StreamStudio web applications, you must add a StreamStudio web portal in Control Center. The web portal is available to all application domains in a site. Several application domains can share one web portal. See the *Control Center* user guide for information on how to add StreamStudio web portals.

Connect StreamStudio portal to application domains

You must connect the StreamStudio web portal to the application domains where you want to use the portal. See the *Control Center* user guide for information on how to connect StreamStudio web portals.

Part C

The following applies when upgrading Design Center Projects that include StreamStudio Composition Center.

Configure application domain for Composition Center

In addition to the standard StreamStudio application domain configuration, you must also specify the database settings for the web content repository and the connection settings to access the repository. See the *Control Center* user guide for information on how to configure application domains for Composition Center.

Create web content repository

To be able to run a StreamStudio Composition Center application, you must create a web content repository. See the *Control Center* user guide for information on how to create a web content repository.

Note: If you have several StreamStudio portals running, and if these portals are deployed to the same web server, they cannot share the same web content repository.

Part D

The following applies when upgrading Design Center Projects that include StreamStudio Collector.

Connect StreamServe archive to application domains

You must connect the StreamServe archive to the application domains (runtime repositories) that contain the documents to archive. One StreamServe archive can be shared by several application domains. See the *Control Center* user guide for information on how to connect StreamServe archives.

Create Archiver applications

You must create Archiver applications in the SP5 application domains. The purpose of the Archiver application is to transfer documents and metadata from the runtime repository to the StreamServe archive. See the *Control Center* user guide for information on how to create Archiver applications.

Upgrading Design Center Projects

The following steps describe how to upgrade an SP4 Design Center Project to SP5.

	Steps	Comments
1	Open the Project in Design Center SP5.	When you open a Design Center Project in Design Center SP5, the Project files are automatically upgraded to SP5. The Design Center log displays information about all upgraded files, and you are prompted to save the files or cancel the upgrade.
2	Check the upgraded Project.	See *Checking the upgraded Project* on page 57.
3	Save the upgraded Project.	Save the Project and exit Design Center.

Checking the upgraded Project

After upgrading, you should verify the configuration of the upgraded Project in Design Center. See the following sections for more information:

- *Composition Center enabled StoryTeller Processes* on page 57
- *Document types* on page 57.
- *Preview connectors for preview in Composition Center* on page 59.

Composition Center enabled StoryTeller Processes

If the Project includes Composition Center enabled StoryTeller Processes, the template versions are set to -1 in the upgraded (SP5) Project. You must temporarily set all template versions to 1 before you export and deploy the Project. You will later change to the correct template versions after you have migrated the web content repository resources.

To set all template versions to 1

1 Right-click the Project node and select **Update Composition Center template versions**.

2 Select **Set all Composition Center template versions to 1** and click **OK**.

Document types

Create a global resource set for document types and metadata

You must create a global resource set for all document types and metadata groups used within an organization. This ensures that all document types, metadata groups, and metadata are unique.

To create a global resource set, you can create a separate Design Center Project, and create the global resource set in this Project.

Connect the global resource set to the Design Center Projects

When you have created the global resource set, you must add it to your Design Center Projects:

1 In Design Center, select **File** > **Add to Project**. The Add to Project dialog box opens.

2 Click **Browse**. A file browser opens.

3 Browse to and select the global resource set. The global resource set is added to the Project.

4 Connect the global resource set to the appropriate Message and Runtime configurations in the Project.

Add document type resources to the global resource set

You must generate a document types file (`*.xml`) that includes all document types and metadata used in your Design Center Projects, and then import this file to the global resource set. This will create all document type and metadata group resources in the global resource set.

1 Export and deploy the upgraded (SP5) Design Center Projects that contain the document types you need. Do **NOT** start the StreamServer applications.

2 In Control Center, right-click the application domain node and select **Retrieve Document Types File**. A file browser opens.

3 Specify the path and click **Save**.

4 In Design Center, right-click the global resource set and select **Synchronize Document Types**. A file browser opens.

5 Specify the path to the document types file and click **Open**. The document type and metadata group resources are added to the global resource set.

Connect document types to Messages and output connectors

When you have added all document type resources to the global resource set, you must replace the old document type resources connected to Messages and output connectors with the new document type resources in the global resource set.

Remove the old document type resources

When you have replaced the document type resources, you can remove the old document type resources and metadata group resources from your Projects.

Enabling metadata in reusable Composition Center resources

If metadata is used in reusable Composition Center resources (text and rules), you must connect the metadata group that contains the metadata to all document types used in Composition Center. In this circumstance it is recommended to select the option **Auto-apply to all Document types** when you share the metadata group to document type resources.

1   Open the metadata group resource.

2   Click **Share**.

3   Select **Auto-apply to all Document types** and click **OK**.

This replaces the previous **Metadata are global** option.

Preview connectors for preview in Composition Center

The technology for previewing documents in StreamStudio Composition Center is redesigned. The HTTP connector is replaced by a new preview functionality based on web service requests.

Remove separate physical layer for preview

If the SP4 Project contained a separate physical Platform layer for the preview functionality, you must remove that layer from the upgraded Design Center Project.

Enable previewing using default preview connectors

To enable the new preview functionality for a Message using default preview connectors, you must:

1   Activate the Runtime configuration view that includes the Message.

2   Right-click the Message and select **Service**.
The Service –<*Message name*> dialog box opens.

3   Select **Use default preview connectors**.

4   In the **Service name** text box, enter a descriptive name for the service.
The name must be unique within the application domain.

5   Click **OK**.

Enable previewing using custom preview connectors

For information about how to invoke Messages through service requests and when to create preview output connectors manually, see the *Composition Center* documentation.

Migrating Composer resources

The following steps describe how to migrate Composer resources from the SP4 runtime repository to the SP5 runtime repository.

Steps	Comments
1 Export the Composer resources from the SP4 runtime repository.	Use Database Administration Tool to export Composer resources and security data from the SP4 runtime repository to a ZIP file. See *Exporting Composer resources* on page 60.
2 Import Composer resources to the SP5 Runtime repository.	Use Database Administration Tool to import Composer resources and security data from the ZIP file to the SP5 runtime repository. See *Importing Composer resources* on page 60.

Exporting Composer resources

Use Database Administration Tool to export Composer resources and security data from the SP4 runtime repository to a ZIP file. This ZIP file is used as source when importing the resources to the SP5 runtime repository. Contact StreamServe Support for information on how to export data from earlier versions of Persuasion runtime repositories.

Note: Jobs must be finished, and queues must be empty before you export.

To export Composer resources

1 Start Database Administration Tool and connect to the SP4 runtime repository.

2 Click the **Runtime Repository** button.

3 In the **Export to** field, specify the path to the ZIP file.

4 Select to include the **Security** and **Composer** areas and click **Export**. The resources are exported to the ZIP file.

Importing Composer resources

Use Database Administration Tool to import Composer resources and security data from the ZIP file to the SP5 runtime repository.

To import Composer resources

1 Start Database Administration Tool and connect to the SP5 runtime repository.

2 Click the **Runtime Repository** button.

3 In the **Import from** field, specify the path to the ZIP file.

4 Click **Import**. The resources are imported from the ZIP file.

Migrating Composition Center resources

The following steps describe how to migrate Composition Center resources from the SP4 web content repository to the SP5 web content repository.

	Steps	Comments
1	Export security data from the SP4 runtime repository.	Use Database Administration Tool to export security data from the SP4 runtime repository to a ZIP file. See *Exporting security data from SP4 runtime repository* on page 62.
2	Export the Composition Center resources from the SP4 web content repository.	Use Database Administration Tool to export document definitions and related resources from the SP4 web content repository to a ZIP file. See *Exporting Composition Center resources from SP4 web content repository* on page 62.
3	Import security data to the SP5 runtime repository.	Use Database Administration Tool to import security data from the ZIP file to the SP5 runtime repository. See *Importing security data to SP5 runtime repository* on page 62.
4	Find document types file used in SP4 environment.	Before you can import Composition Center resources to the SP5 web content repository, you must find the SP4 document types file (document_types.xml) that includes all document types. You must use this file when you import Composition Center resources to the SP5 web content repository.
5	Import Composition Center resources to the SP5 web content repository.	Use Database Administration Tool to import document definitions and related resources from the ZIP file to the SP5 web content repository. See *Importing Composition Center resources to SP5 web content repository* on page 63.
6	Update template versions.	Update the versions of StoryTeller Processes that are used as templates in Composition Center. See *Updating template versions* on page 63.
7	Start StreamServer applications.	Start the StreamServer applications in the SP5 environment, and wait for the web content repository and runtime repository to get synchronized.
8	Re-publish document definitions in Composition Center.	All published document definitions are set to Unpublished after the import. You must therefore re-publish the document definitions in Composition Center. See the *Composition Center* documentation for information.

Exporting security data from SP4 runtime repository

Use Database Administration Tool to export security data from the SP4 runtime repository to a ZIP file. This ZIP file is used as source when importing the security data to the SP5 runtime repository.

To export security data

1 Start Database Administration Tool and connect to the SP5 runtime repository.

2 Click the **Runtime repository** button.

3 Make sure only the Security area is selected.

4 In the **Export to** field, specify the path to the ZIP file.

5 Click **Export**. The resources are exported to the ZIP file.

Exporting Composition Center resources from SP4 web content repository

Use Database Administration Tool to export document definitions and related resources from the SP4 web content repository to a ZIP file. This ZIP file is used as source when importing the Composition Center resources to the SP5 web content repository.

To export Composition Center resources

1 Start Database Administration Tool and connect to the SP4 web content repository.

2 Click the **Web content repository** button.

3 In the **Export to** field, specify the path to the ZIP file.

4 Click **Export**. The resources are exported to the ZIP file.

Importing security data to SP5 runtime repository

Use Database Administration Tool to import security data from the ZIP file to the SP5 runtime repository.

To import security data

1 Start Database Administration Tool and connect to the SP5 runtime repository.

2 Click the **Runtime repository** button.

3 In the **Import from** field, specify the path to the ZIP file.

4 Click **Import**. The security data is imported from the ZIP file.

Importing Composition Center resources to SP5 web content repository

Use Database Administration Tool to import document definitions and related resources from the ZIP file to the SP5 web content repository.

To import Composition Center resources

1   Start Database Administration Tool and connect to the SP5 web content repository.

2   Click the **Web content Repository** button.

3   In the **Import from** field, specify the path to the ZIP file.

4   Click **Import**. The Import dialog box opens.

5   Browse to and select the SP4 document types file (`document_types.xml`).

6   Click **OK**. The resources are imported from the ZIP file.

Updating template versions

After importing document definitions and related resources, you must update the versions of the StoryTeller Processes that are used as templates in Composition Center. You must do this in all Design Center Projects that contain this type of StoryTeller Processes.

Version information file

When you update, you must use a version information file:

```
imported-templateversions-<repositoryname>-<schemaversion>-
<yyyyMMddHHmmss>.xml
```

This file is created during the import to the web content repository, and you will find it in:

```
<user_home>\dbadmintool-files\import
```

To update template versions in a Design Center Project

1   In the Project browser in Design Center, right-click the Project node and select **Update Composition Center template versions**. The Set Composition Center template version dialog box opens.

2   Select **Update all Composition Center template versions from file**.

3   Browse to and select the version information file to use (see *Version information file* above) and click **OK**.