



## **Installing and Upgrading BIRT iHub on Windows**

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# About Installing and Upgrading BIRT iHub on Windows

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*Installing and Upgrading BIRT iHub on Windows* includes the following chapters:





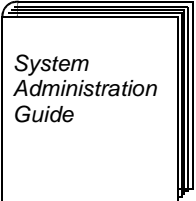
- *About Installing and Upgrading BIRT iHub on Windows.* Provides an overview of this guide and Actuate BIRT iHub documentation.
- *Part 1. Installing BIRT iHub.* Describes the process of setting up the environment and installing BIRT iHub modules on a Microsoft Windows system.
- *Chapter 1. Installing BIRT iHub overview.* Describes the BIRT iHub modules and environment.
- *Chapter 2. Installing BIRT iHub.* Describes how to install BIRT iHub in a Windows environment.
- *Chapter 3. Setting up BIRT iHub.* Describes how to access System Console and Information Console.
- *Part 2. Upgrading to BIRT iHub 3.1.1.* Describes the process of upgrading BIRT iHub Release 3 (including fix releases) or BIRT iHub Release 3.1 to Release 3.1.1.
- *Chapter 4. Upgrading to Visualization Platform 3.1.1.* Describes the process of upgrading BIRT iHub Visualization Platform from Release 3 (including fix releases) or Release 3.1 to Release 3.1.1.
- *Chapter 5. Upgrading to System Console 3.1.1.* Describes the process of upgrading System Console from Release 3 (including fix releases) or Release 3.1 to Release 3.1.1.

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## Accessing Actuate BIRT iHub information

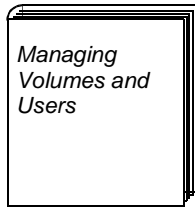
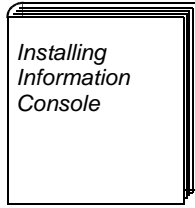
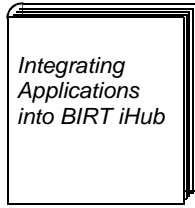
The online documentation includes the materials described in Table I-1. You can obtain HTML and PDF files from the Actuate web site. These documentation files are updated in response to customer requirements.

**Table I-1** BIRT iHub documentation

<b>For information about this topic</b>	<b>See the following resource</b>
Installing BIRT iHub modules on Linux	 <i>Installing and Upgrading BIRT iHub on Linux</i>
Installing BIRT iHub modules on Windows	 <i>Installing and Upgrading BIRT iHub on Windows</i>
Installing multiple BIRT iHub modules on Linux	 <i>Installing Multiple Modules on Linux Platforms</i>
Installing multiple BIRT iHub modules on Windows	 <i>Installing Multiple Modules on Windows Platforms</i>
Architecture overview Using the default PostgreSQL RDBMS Using an alternative RDBMS Setting up a cluster Backing up the metadata RDBMS	 <i>System Administration Guide</i>



**Table I-1** BIRT iHub documentation

<b>For information about this topic</b>	<b>See the following resource</b>
Managing volume-level operations Setting up users and groups Advanced job schedules Using HTTPS to access Information Console	 <p><i>Managing Volumes and Users</i></p>
Installing a stand-alone Information Console Configuring Information Console Configuring BIRT Viewers and Report Studio	 <p><i>Installing Information Console</i></p>
Actuate web services and SOAP messaging overview Actuate Information Delivery API operations and data types reference Using Actuate JavaScript API to customize access to reports and report components Reference for configuring BIRT Viewer and Report Studio Reference for BIRT Viewer and Report Studio URIs Using Java Report Server Security Extension (RSSE) APIs Using logging, performance monitoring, and archiving features Customizing the Actuate software installation process	 <p><i>Integrating Applications into BIRT iHub</i></p>
Late-breaking information and documentation updates	Release notes and updated localization files posted on Actuate <a href="#">Support</a>

## Obtaining documentation

Actuate provides technical documentation in PDF and HTML formats. You can download PDF or view HTML versions of the documentation from the following URL:

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You can contact Customer Support by e-mail or telephone. For contact information, go to the following URL:

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## **Supported and obsolete products**

The Actuate Support Lifecycle Policy and Supported Products Matrix are available on the Actuate Support web site at the following URL:

<http://support.actuate.com/documentation/spm>

# Part One



## Installing BIRT iHub



# 1

## Installing BIRT iHub overview

This chapter contains the following topics:

- Understanding BIRT iHub installation
- Understanding the BIRT iHub installation environment

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## Understanding BIRT iHub installation

This chapter describes the modules and components of BIRT iHub Release 3.1.1. The system administrator uses the BIRT iHub installation package to install the Actuate modules described in Table 1-1.

**Table 1-1** Actuate BIRT iHub modules

Module	Description
System Console	A web-based tool for configuring, licensing, managing, and monitoring one or more BIRT iHub Systems.
BIRT iHub Visualization Platform	A web application, server, and metadata database that provide access to dashboards, files, folders, and jobs in a volume. Supports viewing BIRT reports and using Report Studio.

To reduce network traffic, install BIRT iHub on the same host machine as the BIRT iHub system database. Alternatively, install BIRT iHub and the metadata database on different machines to distribute processing across multiple machines.

The installation procedure installs BIRT iHub using an evaluation license. After installation, the administrator specifies a purchased product license using System Console. For a complete understanding of configuring BIRT iHub licenses, including binding the BIRT iHub processes to particular processors in a multi-core machine, see *BIRT iHub System Administration Guide*.

### Overview of installation operations

To install BIRT iHub, the system administrator performs the following operations:

- Downloads the installation program for System Console and for BIRT iHub Visualization Platform from the download site
- Runs the installation programs

After performing the installation, the system administrator loads a license for purchased options.

### About installation components

BIRT iHub Visualization Platform provides common services such as user management, activity logging, and the PostgreSQL RDBMS containing system metadata.

The BIRT iHub Visualization Platform module includes the following components:

- BIRT iHub System with a PostgreSQL relational database management system (RDBMS), including a default volume with sample BIRT designs and other documents
- Information Console, which provides an integrated user interface for viewing and editing BIRT dashboards and reports, and iHub Administration

The System Console module includes one component, System Console, which is the graphical user interface (GUI) for administering the BIRT iHub System.

## Storing cluster and volume metadata

BIRT iHub stores metadata containing system, cluster, and volume configuration information in a database. In a default installation, BIRT iHub uses the open-source PostgreSQL RDBMS. iHub also supports using Oracle or a pre-existing PostgreSQL instance.

After installation of the default system, the system administrator can switch to an alternative RDBMS by running the database switcher batch file.

The database that contains BIRT iHub system, cluster, and volume metadata is a critical component of BIRT iHub System. To guard against data loss, the database administrator must back up the schema using the tools and resources of the third-party RDBMS.

For information about how to switch databases and how to back up BIRT iHub cluster and volume schemas, refer to *BIRT iHub System Administration Guide*.

## Support for the metadata database

If you encounter a problem with the operation of the metadata database, Actuate will work with you to resolve it. For example, Actuate may take any or all of the following actions:

- Propose a change in your environment that avoids the problem.
- Make a change in Actuate's code to work around the problem.
- In the case of PostgreSQL, engage with the development community to obtain a patch.
- In the case of Oracle, help you to isolate the problem and report it to the vendor.

## Downloading the installation package

Download the BIRT iHub installation package from an Actuate download site using the URL provided by e-mail.

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# Understanding the BIRT iHub installation environment

The following sections provide supplementary information about the BIRT iHub installation environment.

## Running different releases on the same machine

A BIRT iHub 3 or BIRT iHub 3.1 installation cannot coexist on the same machine with an earlier release of BIRT iHub or iServer.

## Understanding the Java Runtime Environment

The BIRT iHub installation program installs Java Runtime Environment 1.8. By default, BIRT iHub uses this JRE. If you want to use a different JRE, you must set the appropriate environment variables in the configuration files used by BIRT iHub Visualization Platform and System Console.

## Modifying BIRT iHub Visualization Platform configuration files

For BIRT iHub Visualization Platform, you must modify two files:

- `ihub.properties`, located in  
C:\Actuate3\BIRTiHubVisualization\modules\BIRTiHub
- `acpmdconfig.xml`, located in  
C:\Actuate3\BIRTiHubVisualization\modules\BIRTiHub\iHub\etc\

In `ihub.properties`, modify the following lines so that the paths point to the JRE you want to use.

```
#AC_JRE_HOME=C:/Actuate3/BIRTiHubVisualization/java  
#AC_JAVA_HOME=C:/Actuate3/BIRTiHubVisualization/java
```

In `acpmdconfig.xml`, modify the following lines so that the paths point to the JRE you want to use.

```
<EnvironmentVariable Name="JAVA_HOME"  
  Value="C:/Actuate3/BIRTiHubVisualization/java" />  
<EnvironmentVariable Name="AC_JAVA_HOME"  
  Value="C:/Actuate3/BIRTiHubVisualization/java" />  
<EnvironmentVariable Name="AC_JRE_HOME"  
  Value="C:/Actuate3/BIRTiHubVisualization/java" />
```

## Modifying System Console configuration files

For System Console, you must modify two files:

- `systemconsole.properties`, located in  
C:\Actuate3\SystemConsole\modules\SystemConsole



- `wrapper.properties`, located in `C:\Actuate3\SystemConsole\modules\SystemConsole\tomcat\conf\jk\`

In `systemconsole.properties`, comment out the following entries and create new ones that point to the JRE you want to use.

```
#AC_JRE_HOME=C:/Actuate3/SystemConsole/java
#AC_JAVA_HOME=C:/Actuate3/SystemConsole/java
```

In `wrapper.properties`, modify the following line so that the path points to the JRE you want to use.

```
wrapper.java_home=C:\Actuate3\SystemConsole\java
```

## Accessing JAR files for document generation

To generate some documents, iHub requires access to jar files in the `jar` directory of the iHub installation, so you must include the location of the jar file in the `CLASSPATH`. If the BIRT iHub installation directory is `C:\Actuate3\iHub3`, the `jar` directory is in `C:\Actuate3\iHub3\modules\BIRTiHub\iHub`.

## Following best practices

Before deploying BIRT iHub in a production environment, Actuate recommends testing the installation in a separate staging area. The following sections provide some guidelines for setting up a test environment and staging area.

### Using a test environment

Set up a test environment and then move to iHub on the production system when testing is complete. You cannot mix Actuate products from different release levels. For example, you cannot use BIRT iServer Release 11 design tools with BIRT iHub Release 3.1.

Complete the following general tasks in this order to determine how to upgrade your site to BIRT iHub:

- Create a test environment for BIRT iHub. The test environment cannot be on the same machine that hosts an earlier Actuate installation.
- Install the software in the test environment. Create any applications you need using BIRT iHub Integration Technology in the test environment.
- Ask application developers and a few users to perform some typical tasks in the test environment.
- Create a production staging area.
- Install the remaining BIRT iHub desktop products, if required, in production environments on the user workstations. Verify that the desktop products function properly.

- Schedule a low-impact time to switch to the production system.

## Setting up a production staging area

A production staging area is one that you can use for testing and also configure as the live production system. The production staging area can be a separate configuration on the live production machine or a separate machine. You can install all BIRT iHub products or the BIRT iHub server products and a subset of the desktop products.

If you plan to test BIRT iHub desktop products, identify which users to include in the final testing. Developers and users can then confirm that applications perform as expected in the BIRT iHub production staging environment.

Complete the following general tasks to test BIRT iHub:

- Install BIRT iHub software in a production staging area.
- Install BIRT iHub desktop software on the test user machines.
- Verify that the BIRT iHub production staging environment works correctly.
- Install the remaining BIRT iHub desktop products, if you installed a subset earlier.
- Verify that all the BIRT iHub desktop products work correctly.
- Begin setting up a production environment as described in the following section.

## Setting up a production environment

When testing is complete, confirm that your applications work as expected in the BIRT iHub environment. Set up the production environment and schedule a date and time to activate BIRT iHub.

When you switch to BIRT iHub, use the following procedure list as a general guideline:

- Install design and document files.
- Start BIRT iHub.
- Inform users that they can start using BIRT iHub design tool products.

# Installing BIRT iHub

This chapter contains the following topics:

- Prerequisites for installing BIRT iHub on Windows
- Installing individual BIRT iHub modules on Windows
- Reviewing the BIRT iHub installation
- Stopping and starting a System Console or BIRT iHub instance
- Uninstalling BIRT iHub modules

---

## Prerequisites for installing BIRT iHub on Windows

For optimum performance, use a system that has a minimum of 8 GB RAM.

### Removing iServer environment variables

If you have installed Actuate iServer on the computer on which you plan to install BIRT iHub, you must remove all iServer environment variables, for example AC\_SERVER\_HOME, before installing BIRT iHub.

### Checking for ports used by BIRT iHub

BIRT iHub processes use network ports to communicate. Before installation, ensure that the ports used by BIRT iHub are available on the system. The ports used by BIRT iHub modules are listed in Table 2-1.

**Table 2-1** Required ports during and after BIRT iHub installation

Port	Name	Description
8000	SOAPDispatchSOAPPort	Port for the Message distribution service endpoint
8100	PMDPort	Message Distribution service port
8432	PostgreSQL port	For iHub 3 metadata
8433	PostgreSQL port	For iHub 3.1 metadata
8500	SocketBaseForProcesses	Base port number for processes
8700	AppContainerPort CustomEventServicePort	Application container process listen port and Custom Event Service Port
9432	PostgreSQL port	For System Console

Additional ports used by BIRT iHub modules after the installation are listed in Table 2-2.

**Table 2-2** Required ports after BIRT iHub installation

Port	Name	Description
8010	ProvisioningSOAPPort	Port for the Provisioning service endpoint
8011	ProvisioningSOAPSSLPort	SSL Port for the Provisioning service endpoint
11100	UDPPort	UDP port [Heartbeat]

**Table 2-2** Required ports after BIRT iHub installation

Port	Name	Description
11101	ReportingEngineHeartbeatPort	Port number for receiving factory server heartbeat
12100	SOAPPort	Port for Integration server message endpoint
13500	ServerSOAPPortBase	Base port number for iHub internal SOAP endpoint
14000	NWPPort	Port for Integration server query endpoint
14200	JavaEncycServerInternalSoapPort	Port number for iHub encyclopedia engine internal SOAP endpoint for servicing iHub components requests
15200	iHubcSOAPPort	Port number for iHubc SOAP endpoint
21000	jsrvrihub	Base port number for BIRT online
21500	jfctsvrihub	Base port number for BIRT factory processes

You can change some of the port numbers that BIRT iHub uses after installing BIRT iHub. For more information, see “,” later in this chapter.

## Requirements to install and run BIRT iHub on Windows

Actuate recommends creating a dedicated user account at the operating system level for installing and running BIRT iHub. Having a dedicated user account isolates iHub-specific issues and events on a machine, making it easier to administer the environment. For optimum appearance of BIRT iHub pages, ensure that ClearType is set on the Windows system used to access BIRT iHub.

### Configuring a user account for BIRT iHub

The user account must meet the following requirements:

- Be a member of the Windows Administrators group  
The account must have privileges to access the required software and hardware, such as database servers, printers, and BIRT iHub files and folders.
- To run the BIRT iHub processes as services, have log on as a service privilege  
If the account does not meet this requirement, the BIRT iHub installation program prompts you to configure the privilege to run the BIRT iHub service.

If you plan to install BIRT iHub on a machine controlled by a domain server, install BIRT iHub while logged in to a user account controlled by the local machine, not by the domain server. When you create a BIRT iHub cluster, all BIRT iHub nodes in the cluster must be installed and the processes run under the same user account.

### **How to configure a user account with administrator privileges**

To configure a user account with administrator privileges for installing and running iHub, perform the following steps.

- 1 In Windows, open the Command Prompt and type:  
`lusrmgr.msc`
- 2 In Local Users and Groups, choose Users to display the list of users.
- 3 Double-click the user to display the properties.
- 4 In Properties—General, deselect Account is disabled, if necessary.
- 5 In Properties—Member Of, choose Add and perform the following tasks:
  - 1 In Select Groups, in Enter the object names, type:  
`Administrators`
  - 2 Choose Check Names. Choose OK.
- 6 Exit Local Users and Groups.

### **How to configure the log on as a service privilege**

To configure the log on as a service privilege manually, perform the following steps:

- 1 Choose Windows Control Panel→Administrative Tools→Local Security Policy.
- 2 In Local Security Policy, navigate to Security Settings—Local Policies—User Rights Assignment.
- 3 Choose Log on as a service from the Policy list.
- 4 In Log on as a service Properties, perform the following tasks:
  - 1 Choose Add User or Group.
  - 2 In Select Users or Groups, add the user name. Choose Check Names to check for any issue concerning the name.
  - 3 On Select Users and Groups, choose OK.
  - 4 On Log on as a service Properties, choose OK.
- 5 Exit Local Security Policy.

## How to run Visualization Platform as a Power user

If you want a Power user to launch the BIRT iHub Windows services, run the register.bat script as Administrator and provide the user name and password for the Power user.

- 1 Navigate to the folder containing the Visualization Platform home folder, for example:

```
cd \Actuate\BIRTiHubVisualization\modules\BIRTiHub
```

or:

```
cd \Actuate3\BIRTiHubVisualization\modules\BIRTiHub
```

- 2 Use the register batch script to create and start the services as a Power user:

```
register.bat <username> <password>
```

Wait for the script to complete.

- 3 Choose Start → Control Panel → Administrative Tools → Services. Verify that the Actuate iHub <release> Service and the Actuate PostgreSQL for iHub <release> Service appear in the list of services.

## Setting ClearType text properties

Using ClearType text on a Windows system provides the optimal appearance for BIRT iHub pages. All BIRT iHub users require this configuration setting.

### How to configure ClearType text

To configure ClearType text, perform the following steps.

- 1 Open Windows Control Panel.
- 2 If Control Pane view is set to Category:
  - 1 Choose Appearance and Personalization.
  - 2 Choose Fonts.
  - 3 Choose Adjust ClearType text.
- 3 If Control Panel view is set to Large or Small icons:
  - 1 Choose Fonts.
  - 2 Choose Adjust ClearType text.
- 4 On ClearType Text Tuner, select Turn on ClearType. Choose Next.
- 5 For each of the pages in ClearType Text Tuner, select the sample that looks best to you and then choose Next.
- 6 In You have finished tuning the text on your monitor, choose Finish.

## Running BIRT iHub as a service or from a batch file

The BIRT iHub installation tools support running BIRT iHub processes as Windows services. If you choose this option, the services start whenever the system starts. If you choose not to run the BIRT iHub processes as Windows services, you must run batch files to start the processes.

---

## Installing individual BIRT iHub modules on Windows

This section describes how to install BIRT iHub with Visualization Platform and System Console individually.

Perform the procedures in this section only if you do not have BIRT iHub already installed on your system. If you purchased BIRT iHub Release 3 (including fix releases) or Release 3.1 and installed the files that you downloaded, you can upgrade to BIRT iHub Release 3.1.1 by following the instructions in Chapter 4, “Upgrading to Visualization Platform 3.1.1” and Chapter 5, “Upgrading to System Console 3.1.1.”

Actuate provides a self-extracting executable file for each BIRT iHub module. Executing the file runs a wizard-based install program, which guides you through the install process. The following sections describe how to use the install programs to install individual BIRT iHub modules.

System Console creates a default cluster automatically. If you install System Console and BIRT iHub individually using the procedures described in this section, you must add a node and a volume to the default cluster after installing System Console. For information on clustering, see Chapter 5, “Managing Clusters,” in *BIRT iHub System Administration Guide*.

When using the BIRT iHub installation programs, the administrator performs the following tasks:

- Downloads the self-extracting executable files, `SystemConsole.exe` and `BIRTiHubVisualization.exe`, from the software distribution site
- Executes `SystemConsole.exe` to run the System Console installation program, installing System Console into a directory such as `C:\Actuate3\SystemConsole`, using the embedded evaluation license
- Executes `BIRTiHubVisualization.exe` to run the BIRT iHub Visualization Platform installation program, installing BIRT iHub Visualization Platform into a directory such as `C:\Actuate3\BIRTiHubVisualization`, using the embedded evaluation license

When you run the BIRT iHub installation programs, you see the message “Unable to locate tools.jar.” You can safely ignore this message.

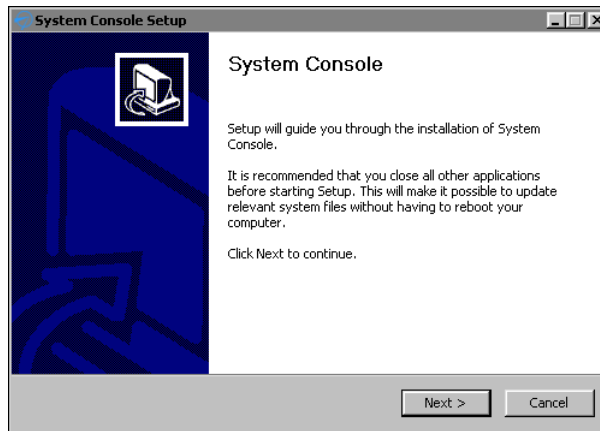


# Installing the System Console module

For information about accessing System Console after installation, see Chapter 3, “Setting up BIRT iHub.”

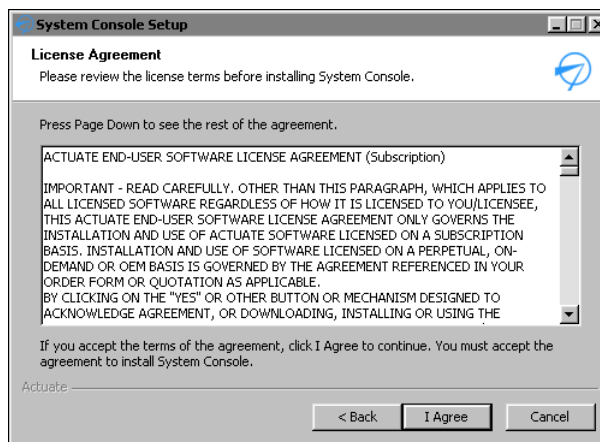
## How to run the System Console installation

- 1 Download the self-extracting executable file, SystemConsole.exe, from the software distribution site.
- 2 Run SystemConsole.exe. The Installer Language message appears. Select a language or accept the default language, English. Then, choose OK.
- 3 System Console Setup appears, as shown in Figure 2-1. Choose Next.



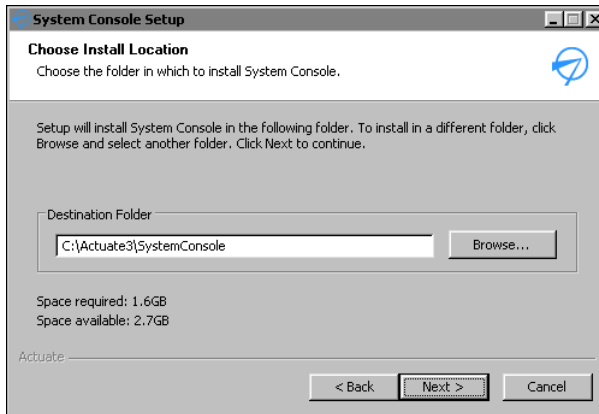
**Figure 2-1** Viewing System Console Setup

- 4 In License Agreement, choose I Agree, as shown in Figure 2-2.



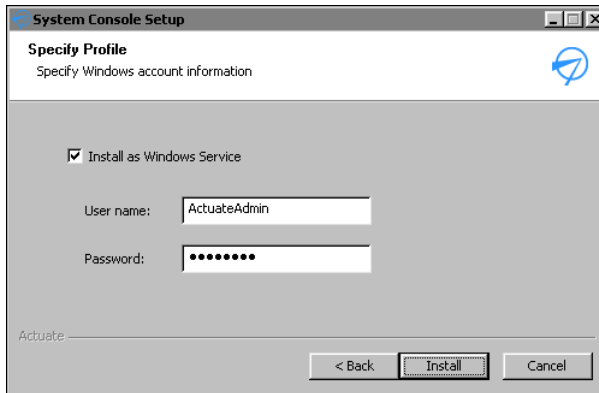
**Figure 2-2** Agreeing to System Console license terms

- 5 In Choose Install Location, in Destination Folder, accept the default path or choose Browse to specify a new folder in which to install System Console, as shown in Figure 2-3. Choose Next. If you receive a message indicating an issue with the destination folder path you specified, specify a different location.



**Figure 2-3** Choosing the System Console installation folder

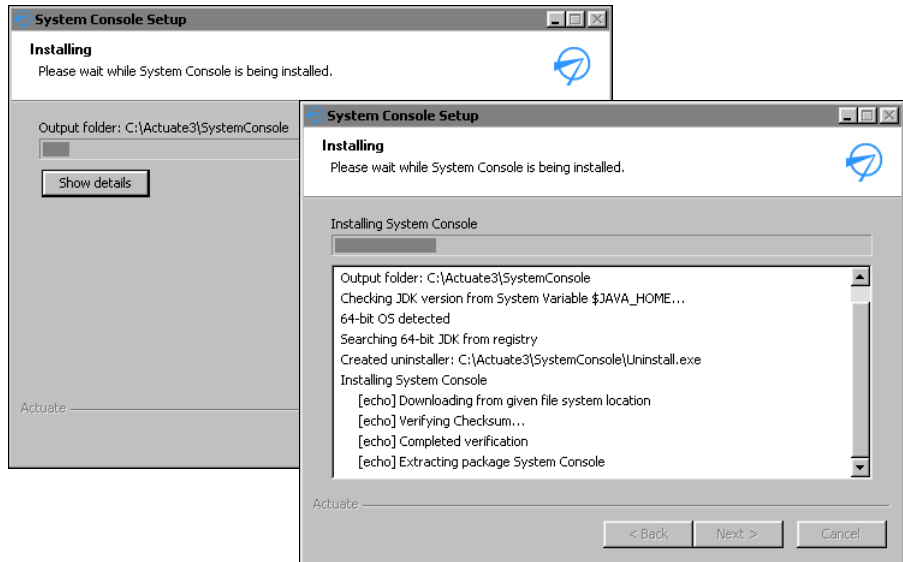
- 6 In Specify Profile, specify the Windows account information, including user name and password, and select whether to install System Console as a Windows service, as shown in Figure 2-4. Choose Install.



**Figure 2-4** Specifying Windows account information for System Console

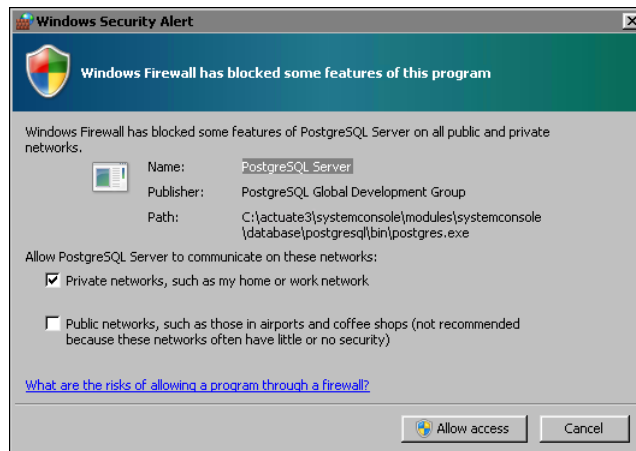
If you select installation as a Windows service, the installer checks whether the account specified has the Log on as a Service privilege. If the account does not have the privilege, a message appears asking if you want to grant the privilege to the account. Choose Yes.

Installing appears, showing the status of the System Console installation process, as shown in Figure 2-5. Choose Show Details to see more information about the System Console installation operations.



**Figure 2-5** Viewing the System Console installation process

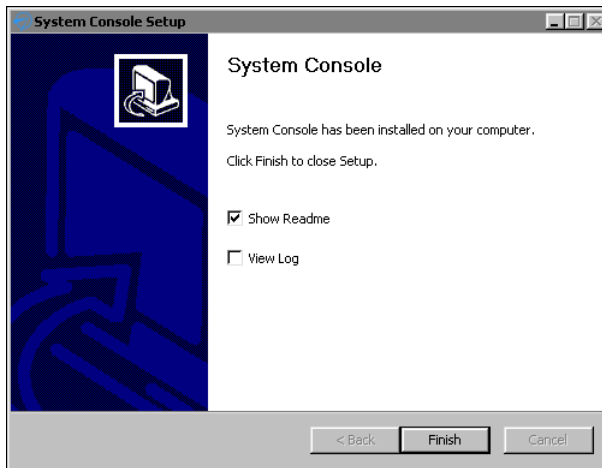
- 7 If a Windows Security Alert appears indicating that the firewall blocks access to System Console or one of its related programs, perform the following tasks:
  - 1 In Allow PostgreSQL Server to communicate on these networks, for example, select Private networks, such as my home or work network. Then, choose Allow access, as shown in Figure 2-6. If a message appears indicating that the firewall is enabled, choose OK.



**Figure 2-6** Allowing firewall access to PostgreSQL Server

- 2 Repeat this step for other Windows Security Alerts if prompted to do so.

- 8 With Show Readme selected, choose Finish to close System Console Setup, as shown in Figure 2-7. Alternatively, deselect Show Readme to not open the readme.txt file. To view the installation log file, select View Log.



**Figure 2-7** Choosing Finish to close System Console Setup

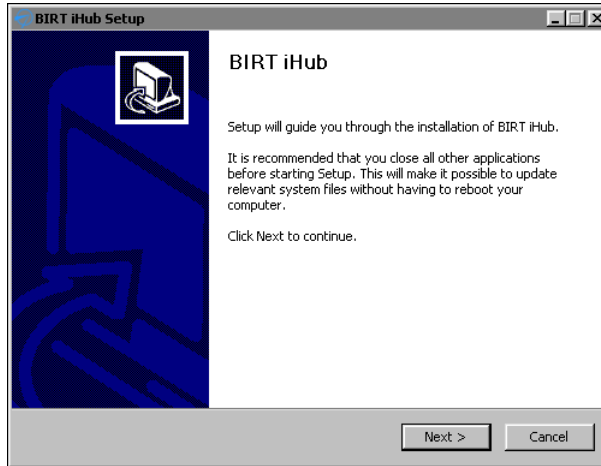
With Show Readme selected, the readme.txt file opens in Notepad. This file states that System Console installed successfully and a shortcut to the module is on the desktop and in the Windows Start menu. A shortcut to System Console appears on the desktop. If you did not install System Console as Windows services, a shortcut to start System Console appears on the desktop also.

## Installing the Visualization Platform module

For information about accessing Visualization Platform after installation, see Chapter 3, “Setting up BIRT iHub.”

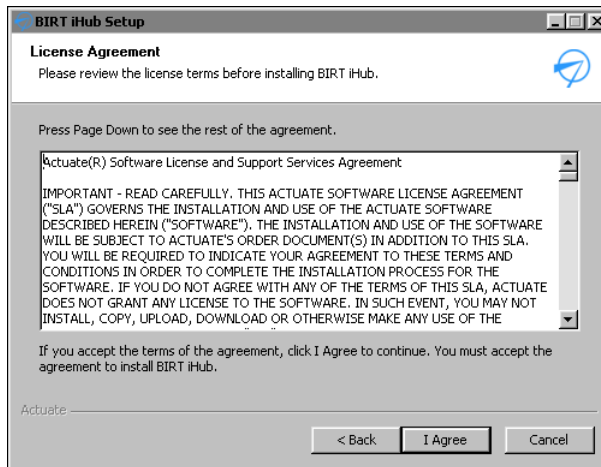
### How to run the Visualization Platform installation program

- 1 Download the self-extracting executable file, BIRTiHubVisualization.exe, from the software distribution site.
- 2 Run BIRTiHubVisualization.exe. The Installer Language message appears. Select a language or accept the default language, English. Then, choose OK.
- 3 BIRT iHub Setup appears, as shown in Figure 2-8. Choose Next.



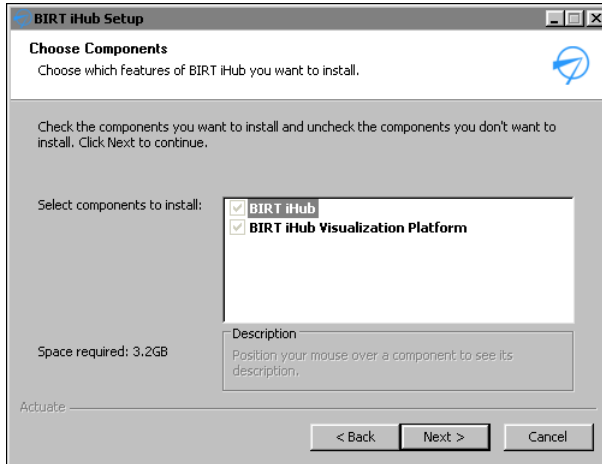
**Figure 2-8** Viewing BIRT iHub Setup

- 4 In License Agreement, choose I Agree, as shown in Figure 2-9.



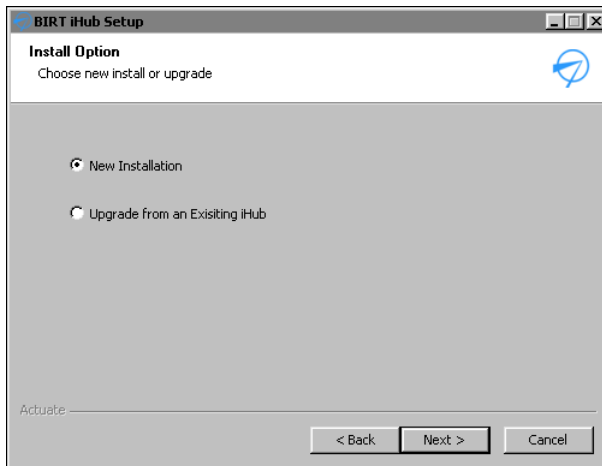
**Figure 2-9** Agreeing to license terms for BIRT iHub

- 5 In Components to be installed, the components you are installing appear, as shown in Figure 2-10. Choose Next.



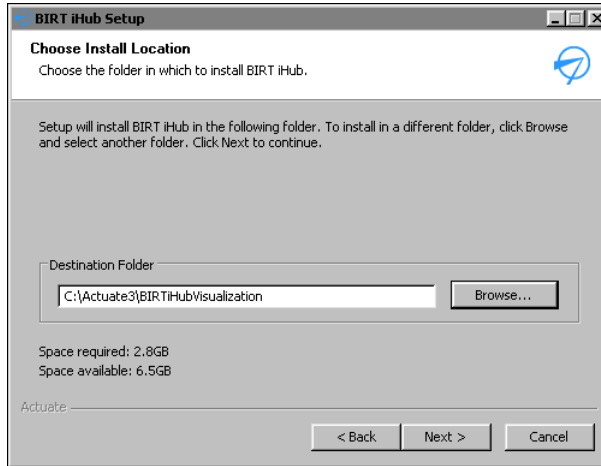
**Figure 2-10** Viewing BIRT iHub installation components

- 6 In Install Option, choose New Installation, as shown in Figure 2-11. Choose Next.



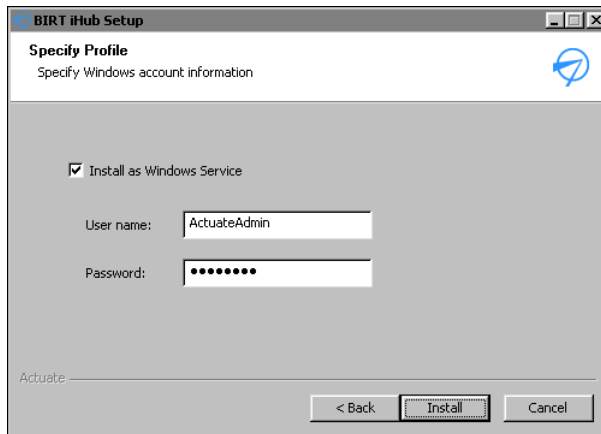
**Figure 2-11** Performing a new installation

- 7 In Choose Install Location, in Destination Folder, accept the default path or choose Browse to specify a new destination folder in which to install BIRT iHub, as shown in Figure 2-12. Choose Next. If you receive a message indicating an issue with the destination folder path you specified, specify a different location.



**Figure 2-12** Choosing the BIRT iHub installation folder

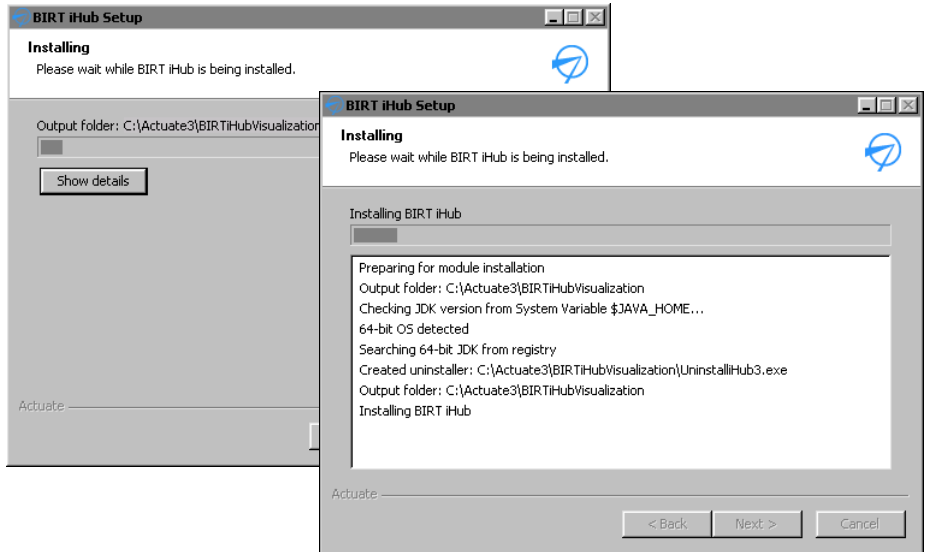
- 8 In Specify Profile, specify the Windows account information, including User name and Password, and select whether to install BIRT iHub as a Windows service, as shown in Figure 2-13. Choose Install.



**Figure 2-13** Specifying Windows account information for BIRT iHub

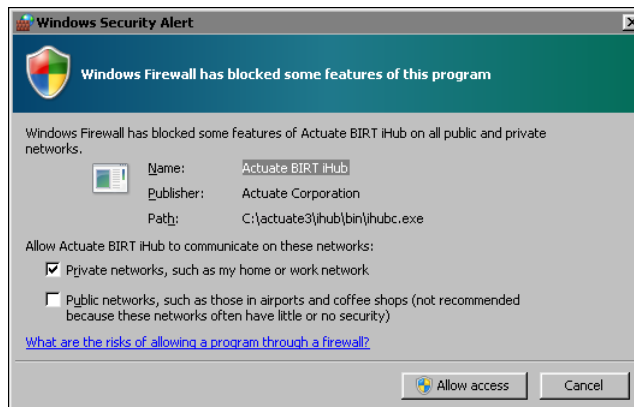
If you select installation as a Windows service, the installer checks whether the account specified has the Log on as a Service privilege. If the account does not have the privilege, a message appears asking if you want to grant the privilege to the account. Choose Yes.

Installing appears, showing the status of the BIRT iHub installation process, as shown in Figure 2-14. Choose Show Details to see more information about the BIRT iHub installation operations.



**Figure 2-14** Viewing the BIRT iHub installation process

- 9 If a Windows Security Alert appears indicating that the firewall is blocking access to Actuate BIRT iHub or one of its related programs, perform the following tasks:
  - 1 In Allow Actuate BIRT iHub to communicate on these networks, for example, select Private networks, such as my home or work network. Then, choose Allow access, as shown in Figure 2-15. If a message appears indicating that the firewall is enabled, choose OK.

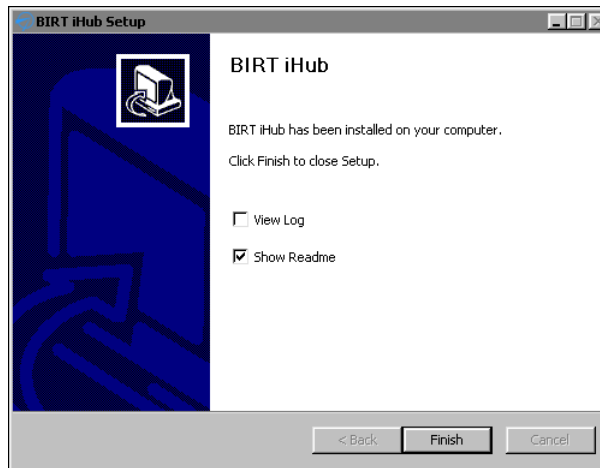


**Figure 2-15** Allowing firewall access to Actuate BIRT iHub

- 2 Repeat this step for other Windows Security Alerts if prompted to do so.



- 10 With Show Readme selected, choose Finish to close BIRT iHub Setup, as shown in Figure 2-16. Alternatively, deselect Show Readme to not open the readme.txt file. To view the installation log file, select View Log.



**Figure 2-16** Choosing Finish to close BIRT iHub setup

- 11 With Show Readme selected, the readme.txt file opens in Notepad. This file states that BIRT iHub installed successfully and a shortcut to the product is on the desktop and in the Windows Start menu. A shortcut to BIRT iHub Visualization Platform appears on the desktop.

If you did not install Visualization Platform as Windows services, shortcuts to stop and start iHub Platform appear on the desktop also.

---

## Reviewing the BIRT iHub installation

The BIRT iHub installation programs create log files containing information about the tasks completed during the installation process. Table 2-3 lists the installation log files for each BIRT iHub module.

**Table 2-3** Installation log files for BIRT iHub modules on Windows

Module	Windows log files
All modules	In the installation folder: installer.log setup.log

*(continues)*

**Table 2-3** Installation log files for BIRT iHub modules on Windows (continued)

Module	Windows log files
System Console	In <installation folder>\modules\SystemConsole: setup.log setupSystemConsole.log In <installation folder>\modules\SystemConsole \setup: setup.log
Visualization Platform	In the installation folder: uploadsamplecontent.log In <installation folder>\modules\BIRTiHub: setupiHub.log startiHub.log In <installation folder>\modules\BIRTiHub\iHub \bin: setup.log

---

## Stopping and starting a System Console or BIRT iHub instance

This section describes the services and scripts you can use to stop and start System Console or BIRT iHub on a single machine.

If you installed System Console or BIRT iHub as Windows services, use Windows services to stop and start the processes that System Console or BIRT iHub run and the default databases they use.

System Console and BIRT iHub installations also include scripts that stop and start System Console and BIRT iHub processes and their default databases. Use these scripts as needed if you did not install System Console or BIRT iHub as Windows services.

The following list describes the Windows services and stop and start scripts for System Console and BIRT iHub.

- System Console
  - Windows Services:
    - Actuate Apache Tomcat 7 for System Console  
Stops and starts the Tomcat application container
    - Actuate PostgreSQL for System Console

Stops and starts the System Console database

- System Console stop and start scripts:
  - <Installation folder>\modules\SystemConsole\stopSystemConsole.bat  
Stops the Tomcat application container and the System Console database
  - <Installation folder>\modules\SystemConsole\startupSystemConsole.bat  
Starts the Tomcat application container and the System Console database
  - <Installation folder>\modules\SystemConsole\setup\stoppostgresql.bat  
Stops the System Console database
  - <Installation folder>\modules\SystemConsole\setup\startpostgresql.bat  
Starts the System Console database
- BIRT iHub
  - Windows Services:
    - Actuate iHub 3.1 Service  
Stops and starts the iHub processes.
    - Actuate PostgreSQL for iHub 3.1 Service  
Stops and starts the out-of-the-box (OOTB) PostgreSQL metadata database
  - BIRT iHub stop and start scripts:
    - <Installation folder>\modules\BIRTiHub\stopiHub.bat  
Stops iHub processes and the OOTB PostgreSQL metadata database
    - <Installation folder>\modules\BIRTiHub\startiHub.bat  
Starts iHub processes and the OOTB PostgreSQL metadata database
    - <Installation folder>\modules\BIRTiHub\iHub\bin\stoppostgresql.bat  
Stops the OOTB PostgreSQL metadata database
    - <Installation folder>\modules\BIRTiHub\iHub\bin\startpostgresql.bat  
Starts the OOTB PostgreSQL metadata database

---

## Uninstalling BIRT iHub modules

Uninstalling BIRT iHub deletes the iHub metadata including dashboards, reports, and jobs in a volume. To transfer a volume to a different iHub installation or to switch to a different metadata database, see *BIRT iHub System Administration Guide*.

The procedures for uninstalling BIRT iHub Visualization Platform and System Console differ, depending on whether the modules run as Windows services. This section describes the procedures for uninstalling the modules when they run as Windows services and when they do not.

### Uninstalling modules if they run as Windows services

Perform the tasks in this section if BIRT iHub Visualization Platform and System Console run as Windows services.

#### How to uninstall BIRT iHub Visualization Platform when it runs as Windows services

- 1 Open Windows Services by choosing Windows Start→Control Panel →Administrative Tools→Services
- 2 Stop the Actuate iHub 3.1 Service.
- 3 Stop the Actuate PostgreSQL for iHub 3.1 Service.
- 4 On Windows Control Panel, choose Programs and Features.
- 5 In the list of installed programs, right-click BIRT iHub Visualization Platform 3.1. and choose Uninstall/Change. A message box may appear, asking you to shut down all services. You can ignore this message. Choose OK. Follow the steps that the uninstall program wizard displays to complete the uninstall.

#### How to uninstall System Console when it runs as Windows services

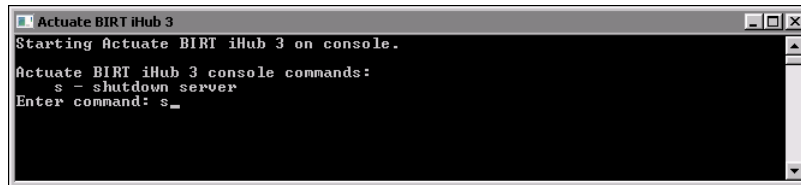
- 1 Open Windows Services by choosing Start→Control Panel →Administrative Tools→Services.
- 2 Stop the Actuate Apache Tomcat 7 for System Console service.
- 3 Stop the Actuate PostgreSQL for System Console service.
- 4 On Windows Control Panel, choose Programs and Features.
- 5 In the list of installed programs, right-click BIRT iHub System Console and choose Uninstall/Change. Follow the steps that the uninstall program wizard displays to complete the uninstall.

## Uninstalling modules if they do not run as Windows services

Perform the tasks in this section if BIRT iHub Visualization Platform and System Console do not run as Windows services.

### How to uninstall BIRT iHub Visualization Platform when it does not run as Windows services

- 1 In the Actuate BIRT iHub 3 command prompt, enter `s` and press Enter to shut down BIRT iHub and PostgreSQL, as shown in Figure 2-17.



**Figure 2-17** Shutting down BIRT iHub and PostgreSQL

- 2 Open a command prompt having administrative privileges, and navigate to the installation folder, for example:

```
C:\Actuate3\BIRTiHubVisualization
```

- 3 Execute the `uninstall.bat` script using the following command line syntax:

```
uninstall b
```

The script displays messages similar to those shown in Listing 2-1.

#### **Listing 2-1** Uninstalling BIRT iHub

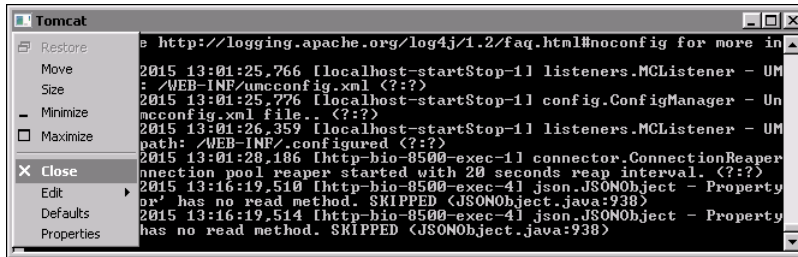
```
C:\Actuate3\BIRTiHubVisualization>uninstall b
Uninstall Modules...
Uninstall Module: BIRT iHub
Unregistering Services..
No Installation path was specified
Set up will try to unregister from current directory
Check unregister.log for more details
Module b: BIRT iHub is unregistered from system successfully.
Now you can now delete the module from the system safely.
Press any key to close this window
```

Exit the command prompt.

- 4 Choose Windows Start→Control Panel→Programs and Features.
- 5 In the list of installed programs, right-click BIRT iHub Visualization Platform 3.1 and choose Uninstall/Change. Follow the steps that the uninstall program wizard displays to complete the uninstall.

## How to uninstall System Console when it does not run as Windows services

- 1 Close the Tomcat command prompt to shutdown Tomcat, as shown in Figure 2-18.



**Figure 2-18** Shutting down Tomcat

- 2 Open a command prompt having administrator privileges, and navigate to the installation folder, for example:

```
C:\Actuate3\SystemConsole
```

- 3 Execute the uninstall.bat script using the following command line syntax:

```
uninstall a
```

The script displays messages similar to those shown in Listing 2-2.

### **Listing 2-2** Uninstalling System Console

```
C:\Actuate3\SystemConsole>uninstall a
Uninstall Modules...
Uninstall Module: System Console
Unregistering Services..
No Installation path was specified
Set up will try to unregister from current directory
Check unregister.log for more details
Module a: System Console is unregistered from system
    successfully. Now you can now delete the module from the
    system safely.
Press any key to close this window
```

Exit the command prompt.

- 4 Choose Windows Start→Control Panel→Programs and Features.
- 5 In the list of installed programs, right-click BIRT iHub System Console and choose Uninstall/Change. In the message box that appears saying that System Console is already uninstalled, choose OK to complete the uninstall. Windows removes BIRT iHub System Console from the list of installed programs.

## Setting up BIRT iHub

This chapter contains information on Setting up BIRT iHub and accessing modules.

---

## Setting up BIRT iHub and accessing modules

After installing System Console and BIRT iHub Visualization Platform, use System Console to create a cluster containing a single node. The cluster enables the system administrator to license the modules and monitor the iHub usage. For information about configuring BIRT iHub applications and databases, see *BIRT iHub System Administration Guide*.

### Accessing System Console

To open System Console, double-click the System Console icon on a Windows desktop or open a browser manually and enter the following URL:

```
http://localhost:8500/sysconsole
```

If you are not running System Console as Windows services, double-click the Start System Console desktop icon to start System Console and the Tomcat application container. Then, double-click the System Console desktop icon. System Console System Login opens in a new browser window.

To provide access to System Console from another system, use the Windows Firewall advanced settings to open the port 8500 to TCP inbound traffic.

To access System Console from another system, open a browser manually and enter a URL similar to the following one, where servername is the name of the machine where you installed System Console:

```
http://servername:8500/sysconsole
```

Log in to System Console using the following default system administrator credentials:

- Username: sysadmin
- Password: system11

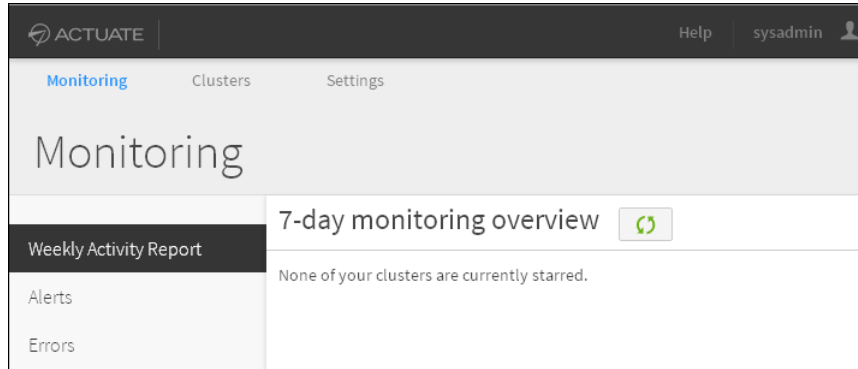
You can change the default system administrator login name and password in System Console—Settings—System Admin Users. System Console initially displays the 7-day monitoring overview, as shown in Figure 3-1.

The login password for the postgres user in the default PostgreSQL RDBMS is postgres.

A system administrator uses System Console to configure BIRT iHub System, including specifying the settings for the following items:

- Create and configure a cluster
- Connect to a database
- Add a volume





**Figure 3-1** Viewing System Console

- Tune services and processes
- Specify ports
- Manage resources
- View Logging and Monitoring System (LMS)
- Configure alerts
- Review and update license options

For more information about using System Console, see *BIRT iHub System Administration Guide*. For more information about administering the PostgreSQL RDBMS, see the vendor documentation at:

<http://www.postgresql.org/docs>

## Accessing Information Console

To access Information Console, double-click the icon on a Windows desktop or open a browser and enter the following URL:

```
http://localhost:8700/iportal
```

If you are not running Information Console as Windows services, double-click the Start iHub Platform desktop icon to start BIRT iHub. Then, double-click the BIRT iHub Visualization desktop icon. Information Console Account Login opens in a new browser window.

To provide access to Information Console from another system, use the Windows Firewall advanced settings to open the port 8700 to TCP inbound traffic.

To access Information Console from another system, open a browser manually and enter a URL similar to the following one, where servername is the name of the machine where you installed Information Console:

```
http://servername:8700/iportal
```

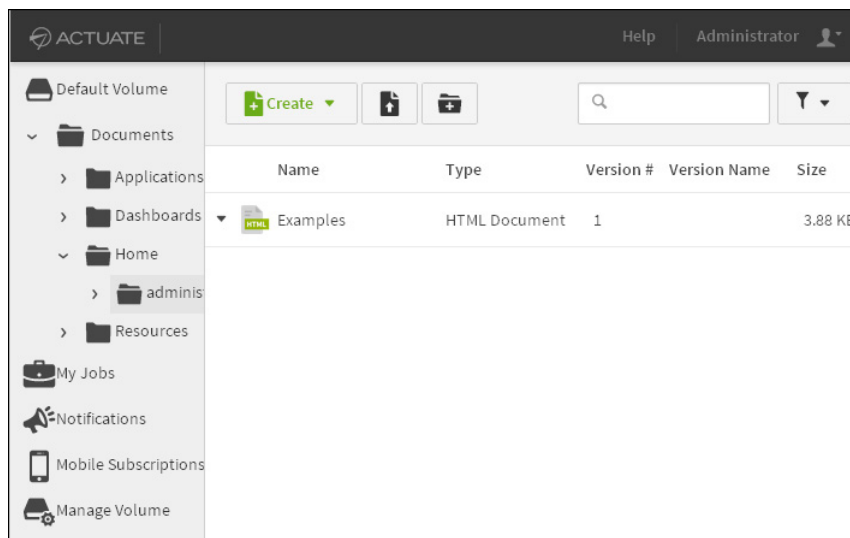
Log in to Information Console using the following default volume administrator credentials:

- Username: Administrator
- Leave the password blank

Then, choose Log In.

To log in to Information Console using a volume other than the default volume, type <volume name>\username. For example, type sales\_volume\Administrator to log in as Administrator to a volume named sales\_volume.

Information Console appears, as shown in Figure 3-2.



**Figure 3-2** Viewing Information Console

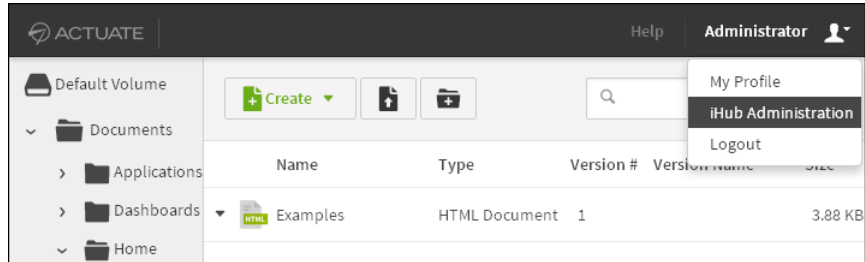
## About Information Console functionality

Information Console provides end-user access to dashboards, files, folders, and gadgets. This access includes sharing items that the user owns, and submitting jobs. For more information about this functionality, see *Using Information Console*.

The system administrator uses iHub Administration to add users and user groups, and to configure access to BIRT iHub shared application services and volume items such as dashboards, files, folders, and gadgets.

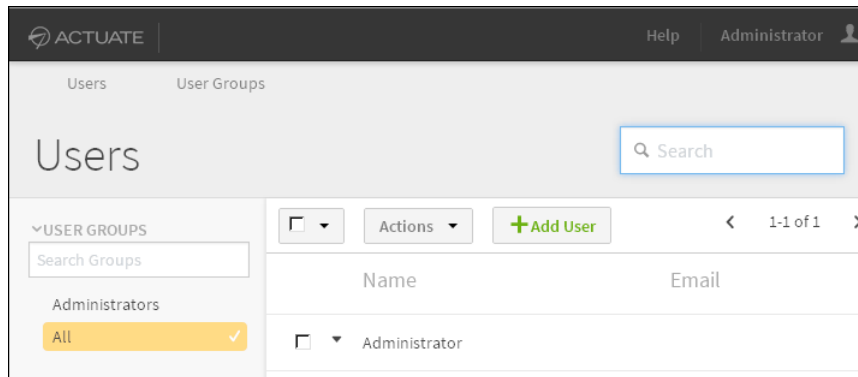
## Accessing user administration

To administer Information Console users and user groups, choose Administrator—iHub Administration, as shown in Figure 3-3. This choice appears if the user has the requisite privileges.



**Figure 3-3** Accessing iHub Administration

iHub Administration appears, as shown in Figure 3-4.



**Figure 3-4** Viewing iHub Administration

### How to disable user administration

To disable user administration functionality completely in this web application for security reasons, perform the following tasks:

- 1 Delete the following folder from the installation environment:  
~\Actuate\iHub3\modules\BIRTiHub\iHub\web\portal\admin
- 2 Comment out or delete the context path setting in the web.xml file in the following location, shown in Listing 3-1:

```
~\Actuate\iHub3\modules\BIRTiHub\iHub\web\portal\WEB-INF  
  \web.xml
```

**Listing 3-1** Administration context path in Information Console web.xml

---

```
<context-param>
  <param-name>MC_CONTEXT</param-name>
  <param-value>/acadmin</param-value>
</context-param>
```

For more information about BIRT iHub Visualization Platform user administration tools, see *Managing Volumes and Users*.

## **Managing a volume**

A user who has administrative privileges has access to the Manage Volume tools in Information Console. For more information about the volume management tools, see *Managing Volumes and Users*.

# Part Two

---

**Upgrading to BIRT iHub 3.1.1**



# 4

## Upgrading to Visualization Platform 3.1.1

This chapter contains the following topics:

- Understanding upgrading to iHub Visualization Platform 3.1.1
- Preparing for the upgrade
- Disabling your existing Visualization Platform
- Pre-upgrade checklist
- Understanding the upgrade program
- Upgrading to Visualization Platform 3.1.1

---

## Understanding upgrading to iHub Visualization Platform 3.1.1

This document explains how to upgrade to Visualization Platform Release 3.1.1 from Visualization Platform 3 (including fix releases) or 3.1.

For assistance with migration to BIRT iHub 3.1.1 from Actuate BIRT iHub 2 or Actuate BIRT iServer, please contact Actuate Support.

The topics in this chapter explain the operations you perform in sequence to upgrade your existing Visualization Platform to Visualization Platform 3.1.1.

This upgrade procedure works for BIRT iHub installations that have multiple volumes, and that use any of the databases BIRT iHub supports:

- The default PostgreSQL database that installs with BIRT iHub Visualization Platform
- A standalone, pre-existing PostgreSQL database
- An Oracle database

You upgrade a BIRT iHub 3 (including fix releases) or BIRT iHub 3.1 installation to BIRT iHub 3.1.1 by performing an in-place upgrade. The upgrade program preserves any customizations you have made to your BIRT iHub installation. It does not overwrite the `acserverconfig.xml`, `acpmdconfig.xml`, or `web.xml` files.

To upgrade an iHub cluster, you must shut down the cluster and upgrade each node individually.

You cannot upgrade in place if you are running BIRT iHub F-Type or BIRT iHub Trial Edition. You must obtain a license from Actuate if you want to install BIRT iHub 3.1.1.

---

## Preparing for the upgrade

This section contains information you need to know before beginning the upgrade process.

### Identifying folders in your existing Visualization Platform installation

Before beginning the upgrade process, identify the following folders in your existing Visualization Platform installation.



- The installation root folder  
The folder where your existing Visualization Platform is installed. It contains a folder named modules. In a typical installation, the default path of the root folder is either:  
C:\Actuate\BIRTiHubVisualization  
or:  
C:\Actuate3\BIRTiHubVisualization
- The Visualization Platform home folder  
The home folder in your existing installation is named iHub. This folder is in the BIRTiHub folder, which the modules folder contains. In a typical installation, the default path of the home folder is either:  
C:\Actuate\BIRTiHubVisualization\modules\BIRTiHub\iHub  
or:  
C:\Actuate3\BIRTiHubVisualization\modules\BIRTiHub\iHub

## Identifying the Windows service user

When you installed your existing Visualization Platform, you selected whether to run it as Windows services. If your existing Visualization Platform is running as Windows services, and you want to run Visualization Platform 3.1.1 as Windows services also, you must specify the Windows service user when upgrading to Visualization Platform 3.1.1. In a typical deployment, Visualization Platform runs as two services:

- Actuate BIRT iHub <release> Service
- Actuate PostgreSQL for iHub <release> Service

Both services have the same Windows service user.

### How to find the name of a service user

- 1 Choose Start → Control Panel → Administrative Tools → Services.
- 2 On Services, right-click the name of the service and choose Properties.
- 3 In Properties, select Log On. The name of the service user appears in This account.

---

## Disabling your existing Visualization Platform

You must disable your existing Visualization Platform before you upgrade to Visualization Platform 3.1.1. After you disable your existing Visualization Platform, make sure that none of the following processes are running:

- ihubd.exe
- ihubc.exe
- ihub.exe
- ihubservletcontainer.exe
- intsrvrihub.exe
- jfctsrvrihub.exe
- jsrvrihub.exe
- LMServer.exe
- LSTailer.exe

### **How to disable Visualization Platform when it runs as Windows services**

If your existing Visualization Platform is running as Windows services, disable it by performing the tasks in this section. For information about running Visualization Platform as Windows services, see “Identifying the Windows service user,” earlier in this chapter.

- 1 Navigate to the folder containing the Visualization Platform home folder, for example:

```
cd \Actuate\BIRTiHubVisualization\modules\BIRTiHub
```

or:

```
cd \Actuate3\BIRTiHubVisualization\modules\BIRTiHub
```

- 2 Use the unregister batch script to stop and remove the services:

```
unregister.bat
```

The script may display a warning message saying that it cannot shut down the server. That message is harmless; you can ignore it.

Wait for the script to complete.

- 3 Choose Start→Control Panel→Administrative Tools→Services. Verify that the Actuate iHub <release> Service and the Actuate PostgreSQL for iHub <release> Service no longer appear in the list of services.

### **How to disable Visualization Platform when it does not run as Windows services**

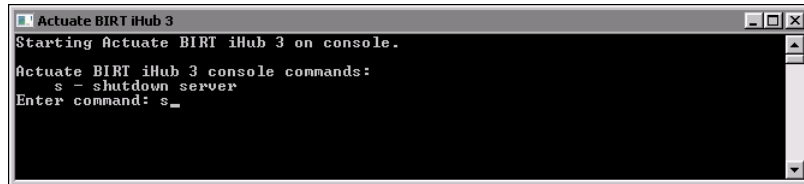
If Visualization Platform is not running as Windows services, disable it by performing the tasks in this section.

Step 2 of the following procedure is only necessary if Visualization Platform uses the default PostgreSQL database that installed with BIRT iHub Visualization Platform.

When BIRT iHub processes are running in a Visualization Platform installation that does not run as Windows services, a command prompt named Actuate BIRT

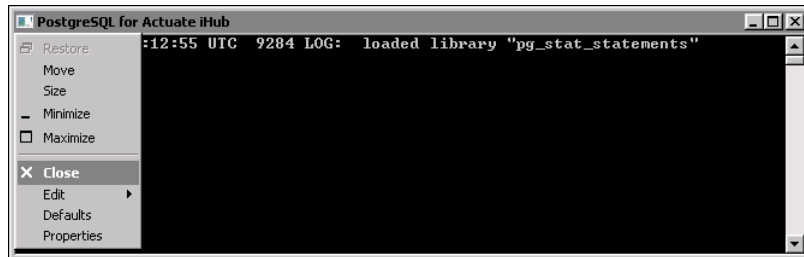
iHub 3 or Actuate BIRT iHub 3.1 and a command prompt named PostgreSQL for Actuate iHub are present.

- 1 In the Actuate BIRT iHub 3 or Actuate BIRT iHub 3.1 command prompt, type `s` and press Enter to shut down BIRT iHub, as shown in Figure 4-1.



**Figure 4-1** Stopping BIRT iHub 3

- 2 Shutdown the PostgreSQL process by closing the PostgreSQL command prompt, as shown in Figure 4-2.



**Figure 4-2** Stopping PostgreSQL

---

## Pre-upgrade checklist

Before you upgrade to Visualization Platform 3.1.1, make sure that:

- You have at least 5 GB of free disk space.
- You make a backup copy of your existing Visualization Platform installation.
- The processes listed in “Disabling your existing Visualization Platform” are not running.
- The following ports are free: 8000, 8100, 8432, 8433, 5000, 8700.
- Files and folders in your existing Visualization Platform installation are not open or in use.
- If you installed BIRT iHub Release 3.0 or 3.1 with Visualization Platform and any other BIRT iHub module on the same machine at the same time using the command-line installer, as documented in *Installing Multiple Modules on Windows Platforms*, ensure that all files and folders associated with all existing BIRT iHub modules are not open or in use.

---

## Understanding the upgrade program

When you run the upgrade program, it performs the following tasks. BIRTiHubVisualization is the name of your existing installation folder.

- Identifies AC\_CONFIG\_HOME and AC\_DATA\_HOME using the acpmdconfig.xml file in the current installation.
- Renames the following folders in order to preserve any customizations you may have made:
  - `${ihub_home}/oda/eclipse/plugins/` to `${ihub_home}/oda/eclipse/plugins_old`
  - `${ihub_home}/Jar/BIRT/` to `${ihub_home}/Jar/BIRT_old`
  - `${ihub_home}/web/iportal/WEB-INF/lib/` to `${ihub_home}/web/iportal/WEB-INF/lib_old`
- Deletes `tools/lib/xmltask-ibm-jdk.jar` and `Jar/chatserver.jar`.
- Renames your existing BIRTiHubVisualization folder to `BIRTiHubVisualization_${uuid}`, where `uuid` is a universally unique identifier such as `de305d54-75b4-431b-adb2-eb6b9e546014`.
- Copies the folder where you unzipped BIRTiHubVisualization.exe to `BIRTiHubVisualization/`.
- Runs the upgrade script in the BIRTiHubVisualization folder.
- Renames the following web.xml files to `web.xml.new`. The settings in your old web.xml files are preserved.
  - `BIRTiHubVisualization/modules/BIRTiHub/iHub/web/iportal/WEB-INF/web.xml`
  - `BIRTiHubVisualization/modules/BIRTiHub/iHub/web/mgmtconsole/WEB-INF/web.xml`
- Overwrites `BIRTiHubVisualization_${uuid}/` with `BIRTiHubVisualization/`. The `shared/` and `data/` folders and `acpmdconfig.xml` file are not overwritten.
- Overwrites `${AC_CONFIG_HOME}` with `BIRTiHubVisualization/shared/config/acserverconfig.xml`. Your old `acserverconfig.xml` file is preserved, but it is updated with the new version number.
- Deletes `BIRTiHubVisualization/`.
- Renames `BIRTiHubVisualization_${uuid}/` as `BIRTiHubVisualization/`.
- Upgrades `acpmdconfig.xml` to include new functionality, but preserves your settings.
- Displays a message indicating that the upgrade is complete.

- Prompts you to start the iHub service unless you specified automatic startup.

---

## Upgrading to Visualization Platform 3.1.1

This section contains information you need to know in order to upgrade to Visualization Platform 3.1.1.

### Specifying the upgrade user account

To ensure that file permissions are set correctly, you must upgrade to Visualization Platform 3.1.1 using the same user account that was used to install your existing Visualization Platform.

### Specifying the Windows service user

If you want Visualization Platform 3.1.1 to run as Windows services, you must specify the same service user that was specified when the existing Visualization Platform was installed. This approach ensures that the Visualization Platform 3.1.1 processes have the correct access permissions on files that the existing Visualization Platform created. For information about how to obtain the name of the service user, see “How to find the name of a service user,” earlier in this chapter.

### Completing the upgrade

Upgrade to Visualization Platform 3.1.1 using the Visualization Platform installation wizard. On the Install Option page, choose Upgrade from an existing iHub. For more information about the installation wizard, see Chapter 2, “Installing BIRT iHub.” Do not open any files or folders in either the existing BIRT iHub installation or the new installation until you have finished the upgrade.

### Post-upgrade tasks

After completing the upgrade, you must perform the following tasks:

- Move any customized JAR files in the following folders to the corresponding folders in the new installation. Then, delete the `_old` folders.
  - `${ihub_home}/oda/eclipse/plugins_old`
  - `${ihub_home}/Jar/BIRT_old`
  - `${ihub_home}/web/iportal/WEB-INF/lib_old`
- Merge the new content in the following files into the corresponding `web.xml` files:

- BIRTiHubVisualization/modules/BIRTiHub/iHub/web/iportal/WEB-INF/web.xml.new
- BIRTiHubVisualization/modules/BIRTiHub/iHub/web/mgmtconsole/WEB-INF/web.xml.new
- Delete the empty folder BIRTiHubVisualization\_`\${uuid}` created by the upgrade program.

## Verifying the Visualization Platform 3.1.1 upgrade

When the upgrade program finishes, Visualization Platform 3.1.1 starts automatically.

To verify that Visualization Platform 3.1.1 was upgraded correctly, log in using the following default credentials:

- Username: Administrator
- Password: Leave Password blank

Visualization Platform 3.1.1 includes a sample volume named Default Volume. After logging in, verify that you can navigate in the volume.

# Upgrading to System Console 3.1.1

This chapter contains the following topics:

- Understanding upgrading to System Console 3.1.1
- Preparing for the upgrade
- Disabling your existing System Console
- Renaming your existing installation root folder
- Installing System Console 3.1.1
- Copying configuration and database files
- Starting and logging in to System Console 3.1.1
- Removing your previous System Console
- Deleting the System Console 3.1.1 database and configuration files

---

## Understanding upgrading to System Console 3.1.1

This document explains how to upgrade from System Console Release 3 (including fix releases) or Release 3.1 to System Console Release 3.1.1. For BIRT iHub, upgrading is the process of installing and configuring Release 3.1.1 and moving the data and files from BIRT iHub Release 3 or 3.1.

The topics in this chapter explain the operations you perform in sequence to upgrade your existing System Console to System Console 3.1.1.

---

## Preparing for the upgrade

This section contains information you need to know before beginning the upgrade process.

### About the privileges needed for the upgrade process

To execute the upgrade process, you must use a command window with local administrator privileges.

### Identifying folders in your existing System Console installation

Before beginning the upgrade process, identify the following folders in your existing System Console installation:

- The installation root folder  
The folder where System Console was installed. It contains a folder named modules. In a typical installation, the default path of the root folder is either:  
`C:\Actuate\SystemConsole`  
or:  
`C:\Actuate3\SystemConsole`
- The System Console home folder  
The home folder in your existing installation is named SystemConsole. This folder is in the modules folder, which the installation root folder contains. In a typical installation, the default path of the home folder is either:  
`C:\Actuate\SystemConsole\modules\SystemConsole`  
or:  
`C:\Actuate3\SystemConsole\modules\SystemConsole`



## Identifying the Windows service user

When you installed System Console, you selected whether to run it as Windows services. If your existing System Console is running as Windows services, and you want to run System Console 3.1.1 as Windows services also, you must specify the name of the Windows service user when installing System Console 3.1.1. In a typical deployment, System Console runs as two services:

- Actuate Apache Tomcat 7 for System Console
- Actuate PostgreSQL for System Console

Both services have the same Windows service user.

### How to find the name of a service user

- 1 Choose Start→Control Panel→Administrative Tools→Services.
- 2 On Services, right-click the name of the service and choose Properties.
- 3 In Properties, select Log On. The name of the service user is either Local System account or the value appearing in This account.

---

## Disabling your existing System Console

If you are installing System Console 3.1.1 onto the same machine where your existing System Console is installed, you must disable System Console before installing System Console 3.1.1. Only one System Console version can run at a time on a single machine.

If you are installing System Console 3.1.1 onto a different machine from where your existing System Console is installed, you must disable System Console before copying configuration and database files from your existing System Console to System Console 3.1.1.

Perform the tasks in this section to disable your existing System Console.

If your existing System Console is running as Windows services, disable System Console by performing the tasks in the following section. For information about running System Console as Windows services, see “Identifying the Windows service user,” earlier in this chapter.

### How to disable System Console services

- 1 Navigate to the setup folder in the System Console home folder, for example:  

```
cd \Actuate\SystemConsole\modules\SystemConsole\setup
```

or:

```
cd \Actuate3\SystemConsole\modules\SystemConsole\setup
```

- 2 Use the unregister batch script to disable the services:

```
unregister.bat
```

Wait for the script to complete.

- 3 Choose Start→Control Panel→Administrative Tools→Services to open the Windows Services applet. Verify that the System Console services no longer appear in the list of services.

If System Console is not running as Windows services, disable System Console by performing the tasks in the following section.

#### **How to stop System Console processes**

- 1 Press Ctrl+Alt+Del and choose Start Task Manager.
- 2 In Windows Task Manager—Processes, right-click java.exe and choose End Process Tree. Apache Tomcat 7 stops.
- 3 Right-click the instance of cmd.exe underneath which multiple subordinate instances of postgres.exe processes are running and choose End Process Tree.

---

## **Renaming your existing installation root folder**

If you are installing System Console 3.1.1 onto the same machine where your existing System Console is installed, you must rename the System Console installation root folder before installing System Console 3.1.1. System Console must be disabled before performing this operation, as described in the preceding section.

If you are installing System Console 3.1.1 onto a different machine from where your existing System Console is installed, you do not need to rename the System Console root folder. Skip to “Installing System Console 3.1.1.”

#### **How to rename your installation root folder**

- 1 Navigate to the folder that contains the System Console installation root folder, for example:

```
cd \Actuate
```

or:

```
cd \Actuate3
```

- 2 Use the ren command to add “\_OLD” to the end of the installation root folder name:

```
ren SystemConsole SystemConsole_OLD
```

---

## Installing System Console 3.1.1

This section contains information you need to know before installing System Console 3.1.1, the location of the installation instructions, and the credentials with which to log in to System Console 3.1.1 after it is installed.

### Specifying the installation user account

To ensure that file permissions are set correctly, you must install System Console 3.1.1 using the same user account that was used to install your existing System Console.

### Specifying the Windows service user

If you want System Console to run as Windows services, you must specify the same service user that was specified when your existing System Console was installed. This approach ensures that the System Console 3.1.1 processes have the correct access permissions on files that your existing System Console created. For information about how to obtain the name of the service user, see “How to find the name of a service user,” earlier in this chapter.

### Setting the installation root folder

Your existing System Console configuration contains absolute paths. System Console 3.1.1 must use the same paths. To ensure that these paths are the same, you must install System Console 3.1.1 using exactly the same installation root folder that your existing System Console installation uses. For example, if your existing System Console was installed in C:\Actuate\SystemConsole, you must install System Console 3.1.1 in C:\Actuate\SystemConsole. If your existing System Console was installed in C:\Actuate3\SystemConsole, you must install System Console 3.1.1 in C:\Actuate3\SystemConsole.

### Completing the installation

Install System Console 3.1.1 using the instructions in Chapter 2, “Installing BIRT iHub.”

### Verifying the System Console 3.1.1 installation

When the installation program finishes, System Console 3.1.1 starts automatically.

To verify that System Console 3.1.1 installed correctly, log in to System Console using the following default system administrator credentials:

- Username: sysadmin

- Password: system11

Do not change any System Console configuration settings or define a cluster because you need to copy configuration and database files first, as described in the next section, “Copying configuration and database files.”

Log out of System Console.

---

## Copying configuration and database files

To preserve data from your previous System Console, copy configuration and database files from your previous System Console to System Console 3.1.1. This operation consists of the following tasks:

- Shutting down System Console 3.1.1
- Backing up and deleting PostgreSQL database files from the System Console 3.1.1 installation
- Copying the files

### Shutting down System Console 3.1.1

Before you can copy files from your previous System Console to System Console 3.1.1, you must shut down System Console 3.1.1.

- If you installed System Console as Windows services  
Using the Windows Services applet, stop the Actuate Apache Tomcat 7 for System Console service, then stop the Actuate PostgreSQL for System Console Service, in that order.
- If you did not install System Console as Windows services  
Use the procedure described in “How to stop System Console processes.”

### Shutting down and disabling your existing System Console

If you have not already done so, you must disable your previous System Console before copying files into System Console 3.1.1. See “Disabling your existing System Console,” earlier in this chapter.

### Deleting PostgreSQL database files

Before you can copy files from your previous System Console to System Console 3.1.1, you must delete PostgreSQL database files that the System Console 3.1.1 installation created. These files are contained in the database\data folder in the home folder of System Console 3.1.1.

### How to delete database files

- 1 Open a command window having administrative privileges.
- 2 Navigate to the database folder within the System Console 3.1.1 home folder, for example:

```
cd \Actuate3\SystemConsole\modules\SystemConsole\database
```

- 3 Create a backup copy of the data folder and move that folder out of the database folder.
- 4 Use the rmdir command to delete the data folder:

```
rmdir /s/q data
```

## Copying the files

To complete the System Console upgrade, you copy the configuration and database files from your previous System Console to System Console 3.1.1.

### Copying files from the same machine

If you installed System Console 3.1.1 onto the same machine where your previous System Console is installed, perform the tasks in this section.

#### How to copy configuration and data files from the same machine

- 1 Navigate to the database folder within the System Console 3.1.1 home folder, for example:

```
cd \Actuate3\SystemConsole\modules\SystemConsole\database
```

- 2 Use the xcopy command to copy the data folder from your previous System Console to System Console 3.1.1. Use the /o option to preserve ownership and permissions. Use a trailing backslash (\) on the xcopy target to indicate it is a folder, for example:

```
xcopy /e/o/q \Actuate3\SystemConsole_OLD\modules\SystemConsole  
  \database\data data\
```

- 3 Navigate to the WEB-INF folder within the System Console 3.1.1 home folder, for example:

```
cd \Actuate3\SystemConsole\modules\SystemConsole\tomcat\webapps  
  \sysconsole\WEB-INF
```

- 4 As a best practice, make backup copies of the following System Console 3.1.1 files:
  - .configured
  - umconfig.xml
  - web.xml

- 5 Use the xcopy command to copy configuration files from your previous System Console to System Console 3.1.1. Use the /o option to preserve ownership and permissions, for example:

```
xcopy /o/q/y \Actuate3\SystemConsole_OLD\modules\SystemConsole
\tomcat\webapps\sysconsole\WEB-INF\.configured
xcopy /o/q/y \Actuate3\SystemConsole_OLD\modules\SystemConsole
\tomcat\webapps\sysconsole\WEB-INF\umcconfig.xml
xcopy /o/q/y \Actuate3\SystemConsole_OLD\modules\SystemConsole
\tomcat\webapps\sysconsole\WEB-INF\web.xml
```

## Copying files from a different machine

If you installed System Console 3.1.1 onto a different machine from where your previous System Console is installed, you share the old System Console folders containing the files to be copied to allow the machine on which System Console 3.1.1 is installed to access the contents of the folders. Then, you copy the files to System Console 3.1.1.

### How to copy configuration and data files from a different machine

- 1 On the machine where your previous System Console is installed, use Windows Explorer to navigate to the System Console home folder. For example:

```
C:\Actuate3\SystemConsole\modules\SystemConsole
```

- 2 Share the database folder. Grant read privilege on the folder, allowing the machine on which you installed System Console 3.1.1 to read the folder contents.
- 3 On the machine where you installed System Console 3.1.1, open a command prompt having administrative privileges.
- 4 Navigate to the database folder in the System Console 3.1.1 installation. For example:

```
cd C:\Actuate3\SystemConsole\modules\SystemConsole\database
```

- 5 Use the xcopy command to copy the data folder from your previous System Console to System Console 3.1.1. Specify the path of the folder you are copying using UNC format. Use a trailing backslash (\) on the xcopy target to indicate it is a folder. The following command copies the old System Console data folder from the shared database folder on a machine named HULU, creating a new folder named data in C:\Actuate3\SystemConsole\modules\SystemConsole\database on the machine where System Console 3.1.1 is installed:

```
xcopy \\HULU\database\data data\ /e/q
```

- 6 On the machine where your previous System Console is installed, use Windows Explorer to navigate to the `\tomcat\webapps\sysconsole` folder inside the System Console home folder. For example:  

```
C:\Actuate3\SystemConsole\modules\SystemConsole\tomcat\webapps\sysconsole
```
- 7 Share the WEB-INF folder. Grant read privilege on the folder, allowing the machine on which you installed System Console 3.1.1 to read the folder contents.
- 8 In the command prompt on the machine where you installed System Console 3.1.1, navigate to the `\tomcat\webapps\sysconsole\WEB-INF` folder inside the System Console 3.1.1 home folder. For example:  

```
cd  
C:\Actuate3\SystemConsole\modules\SystemConsole\tomcat\webapps\sysconsole\WEB-INF
```
- 9 As a best practice, make backup copies of the following files:
  - `.configured`
  - `umcconfig.xml`
  - `web.xml`
- 10 Use the `xcopy` command to copy each configuration file from your previous System Console to System Console 3.1.1. Specify each configuration file path using UNC format. The following commands copy the configuration files from the shared WEB-INF folder on a machine named HULU to the machine where System Console 3.1.1 is installed:  

```
xcopy \\HULU\WEB-INF\.configured /q/y  
xcopy \\HULU\WEB-INF\umcconfig.xml /q/y  
xcopy \\HULU\WEB-INF\web.xml /q/y
```

---

## Starting and logging in to System Console 3.1.1

The upgrade process for System Console is complete. You can now start and log in to System Console 3.1.1.

### How to start System Console 3.1.1 services

If you installed System Console 3.1.1 as Windows services, open the Windows Services applet and start the Actuate PostgreSQL for System Console Service, then start the Actuate Apache Tomcat 7 for System Console service, in that order.

### How to start System Console 3.1.1 processes

If you did not install System Console 3.1.1 as Windows services, perform the following tasks:

- 1 Open a command prompt and navigate to the System Console 3.1.1 home folder. For example:

```
cd C:\Actuate3\SystemConsole\modules\SystemConsole
```

- 2 Execute startupSystemConsole.bat to start the System Console 3.1.1 processes.

Log in to System Console 3.1.1 and verify that it is behaving as expected.

To log in to System Console, open a new browser window and enter a URL similar to the following one, where servername is the name of the machine where you installed System Console 3.1.1:

```
http://servername:8500/sysconsole
```

---

## Removing your previous System Console

When you are confident that System Console 3.1.1 is operating correctly, you can remove your previous System Console. To perform this operation, simply delete the old System Console installation root folder. Do not use the uninstall tool to remove your previous System Console when it is on the same machine as System Console 3.1.1, because the pathnames that System Console 3.1.1 uses are the same pathnames that your previous System Console used. The uninstall tool might not distinguish between the two System Console versions.

### How to remove your previous System Console

- 1 Open a command window with local administrator privileges on the machine where your previous System Console is installed.
- 2 Use the rmdir command to delete your old System Console installation root folder.

If you installed System Console 3.1.1 on the same machine as your previous System Console, you renamed the old System Console installation root folder as described in “Renaming your existing installation root folder,” so use that folder name in the command. For example:

```
rmdir /s/q \Actuate3\SystemConsole_OLD
```

If you installed System Console 3.1.1 on a different machine than where your previous System Console is installed, it was not necessary to rename the installation root folder, so use the original System Console installation root folder name in the command. For example:

```
rmdir /s/q \Actuate3\SystemConsole
```



---

## Deleting the System Console 3.1.1 database and configuration files

Delete the backup copy of the data folder, containing the PostgreSQL database files that the System Console 3.1.1 installation created, as described in “Deleting PostgreSQL database files,” earlier in this chapter.

Delete the backup copies of the following files, which you created when you copied the configuration and database files from your previous System Console to System Console 3.1.1:

- .configured
- umconfig.xml
- web.xml



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