Installing Operations and Performance 3.5 Patch 01

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Introduction

This *Tech Note* outlines installation instructions and information that was not supplied in the Operations & Performance v3.5 p01 readme file.

Note: Operations & Performance v3.5 p01 can only be applied to Operations & Performance v3.5. Prior versions must first be upgraded to v3.5 before the patch can be applied.

Prerequisites

General Recommendations

- **Recommended**: Apply the patch to a Development system first to verify all functionality and work out any potential issues before applying the patch to the production system.

- The Patch 01 Setup.msp patch file is available from the **Wonderware Developer Network** website at Software Downloads > **Operations and Performance**. You can copy the Setup.msp patch file directly to the computer where Operations & Performance is installed, or burn it to a CD.

Setup for CD Distribution

If you decide to copy the patch file to a CD, you *must* use the following conventions to prepare the Patch 01 CD:

- For standard Factelligence, the CD volume name must be **Patch**.

- For Terminal Services Factelligence, the CD volume name must be **PatchTS**.

- The **Setup.msp** file must be placed at the root of the CD.

Other Prerequisites

- You must have both the v3.5 p01 patch installation and v3.5 **original installation files** available when updating a system.

- You must know the Factelligence Configuration Editor password. This is so the database connection can be validated after the database is updated.

- Back up the Galaxy and Factelligence Databases **before** performing any upgrade.

Ensure Upgrade Success

Since the Factelligence database, middleware, Utilization Capability Objects (UCOs), Factelligence .NET Controls, and/or Factelligence Script library will be upgraded, it is recommended to do the following to avoid a mixed updated state until the update is complete:

- Terminate all Operations & Performance clients. Close any IDE sessions that have Entity Model Builder installed.

- Undeploy any Platforms hosting UCOs, Factelligence .NET Controls, and/or Factelligence Script library functions.

- Shutdown Factelligence Service (and Factory Connector(s) if used).

- Shutdown and disable all instances of full Factelligence Middleware server(s) (via Component Services – Wonderware Factelligence COM+). Proxies cannot be disabled.

Apply Patch to the Correct System Components

You must apply the patch on all servers and clients that are running anything related to Operations & Performance.

- Standard clients (Operator, Supervisor, etc.).

- Middleware servers.

- Database server (database update can be run from a middleware node if the database is remote and does not contain local middleware).

- ArchestrA IDE clients that are using Entity Model Builder.

- GR node if you are using Utilization Capability Objects (UCOs), Factelligence .NET Controls, and/or Factelligence Script library in ArchestrA.

  The update does not need to be installed directly on App Server Platforms. Redeploying the platform after the GR and Galaxy objects are updated will update the Platforms. The only exception is if the Platforms contain full middleware (not proxy). In those cases, the update will need to be run on the platform to upgrade middleware.

- Templates and objects utilizing Factelligence .NET Controls, and/or Factelligence Script library will require re-validation.

Database Upgrade Details

The update will migrate the Factelligence database version from v3.5.0001 to **v3.5.0002**.

Applying Operations & Performance v3.5 Patch 01

Basic Patch Installation

1. Place the Setup.msp patch file in a folder on the computer(s) where Operations & Performance is installed (as detailed above), or

put the Patch CD into the computer's CD-ROM drive.

2. Open Windows Explorer, and then locate the Wonderware Factelligence patch Setup.msp file.

3. Double-click **Setup.msp** to begin the patch installation procedure.

4. Click **Next**.

5. Accept the license terms.

6. Click **Next**. The **Updating System** dialog box shows the progress of the patch update.

7. If an existing Factelligence database is detected, the Factelligence Database Configuration Utility will launch and prompt you to migrate your existing Factelligence database from version **3.5.0001** to **3.5.0002**. Be sure to do the following:
    1. Be sure the server and database name are correct.

    2. Enter the Factelligence Configuration Editor password when prompted.

    3. Press the 'Test' button to verify the database connection.

    4. Press **Close** to exit the Factelligence Configuration Editor.

8. Click **Finish**.

9. If prompted, click **Yes** to restart your computer.

Updating Factelligence .NET Controls in ArchestrA (if used)

1. In the ArchestrA IDE Graphic Toolbox, locate any Factelligence Controls and delete them.

   This will break your references, but they will be repaired when the patched controls are imported.

2. Click **File** > **Import** > **Client Control** and import the desired controls from **C:\Program Files\Wonderware\Factelligence\Controls**.

3. Close and re-open the ArchestrA IDE.

Updating Factelligence Script library in ArchestrA (if used)

1. Using the Archestra IDE, click **File > Import > Script Function Library**.

2. Change the File Type selection to **Script Library Files (*.aaSLIB)**.

3. Import the **aaFactMES.aaSLIB** script library from C:\Program Files\Wonderware\Factelligence\Controls\, replacing the existing script library.

   • **Optional**: If using the **Fact.Common.dll** to access Middleware via XML, import this DLL.

4. Click on **File > Import > Client Control** and import the file from C:\Program Files\Wonderware\Factelligence\FactWebAccess\bin

5. Right-click and Validate **all** viewapp objects, object templates, instances, and symbols that use the aaFactMES script library.

- Validate the derived templates that use the script library **FIRST**.

- Tip: Right-click on the Galaxy name to validate all objects, or press **Ctrl + Click** to select specific objects.

6. Close and re-open the ArchestrA IDE.

Updating Utilization Capability Objects in ArchestrA (if used)

1. Using the Archestra IDE, click **File > Import > Objects**.

2. Import the **UtilizationCapability.aaPKG** file from C:\Program Files\Wonderware\Factelligence\AppObjects\.

3. Accept the default import options shown in Figure 1 (below).
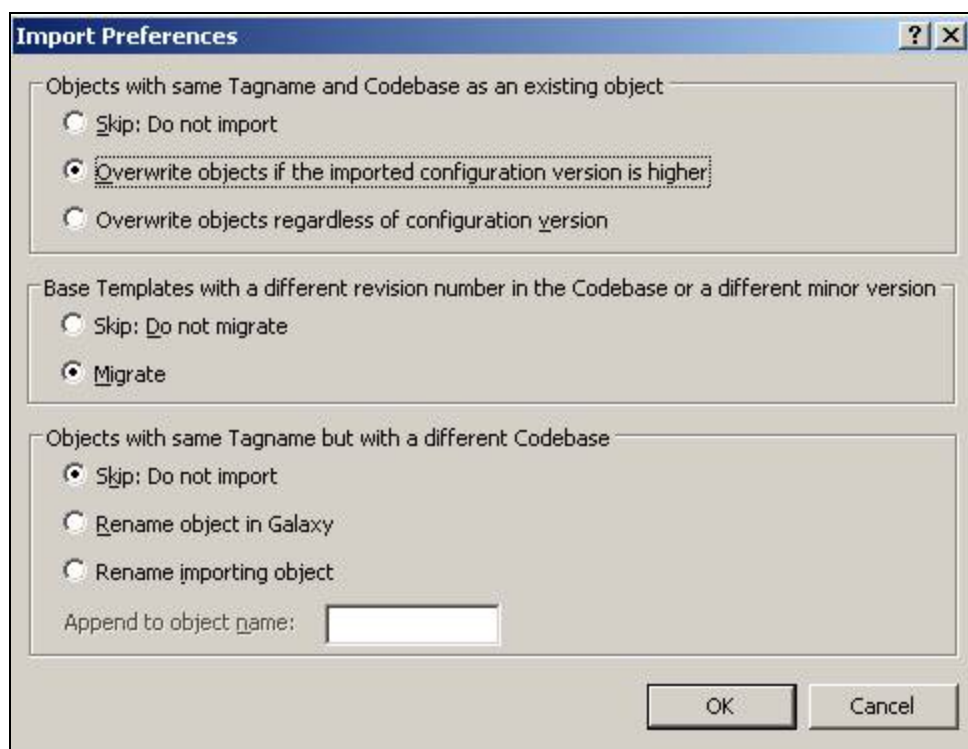
FIGURE 1: UCO DEFAULT IMPORT OPTIONS

4. Close and re-open ArchestrA IDE.

Update ArchestrA Reports

1. Click **Start/Programs/Wonderware/Information Server/Deploy ArchestrA Reports**.

2. Click **aaReports Database > Deploy Reports** on the left panel.

3. Click the **Existing Shared Data Source** option.

4. For Existing SDS Type, click **aaFactelligence**.

5. Browse for the configuration file **C:\Program Files\Wonderware\Factelligence\Reporting Services\RptServicesConfig.xml**.

6. Click the **Deploy** button (Figure 2 below).
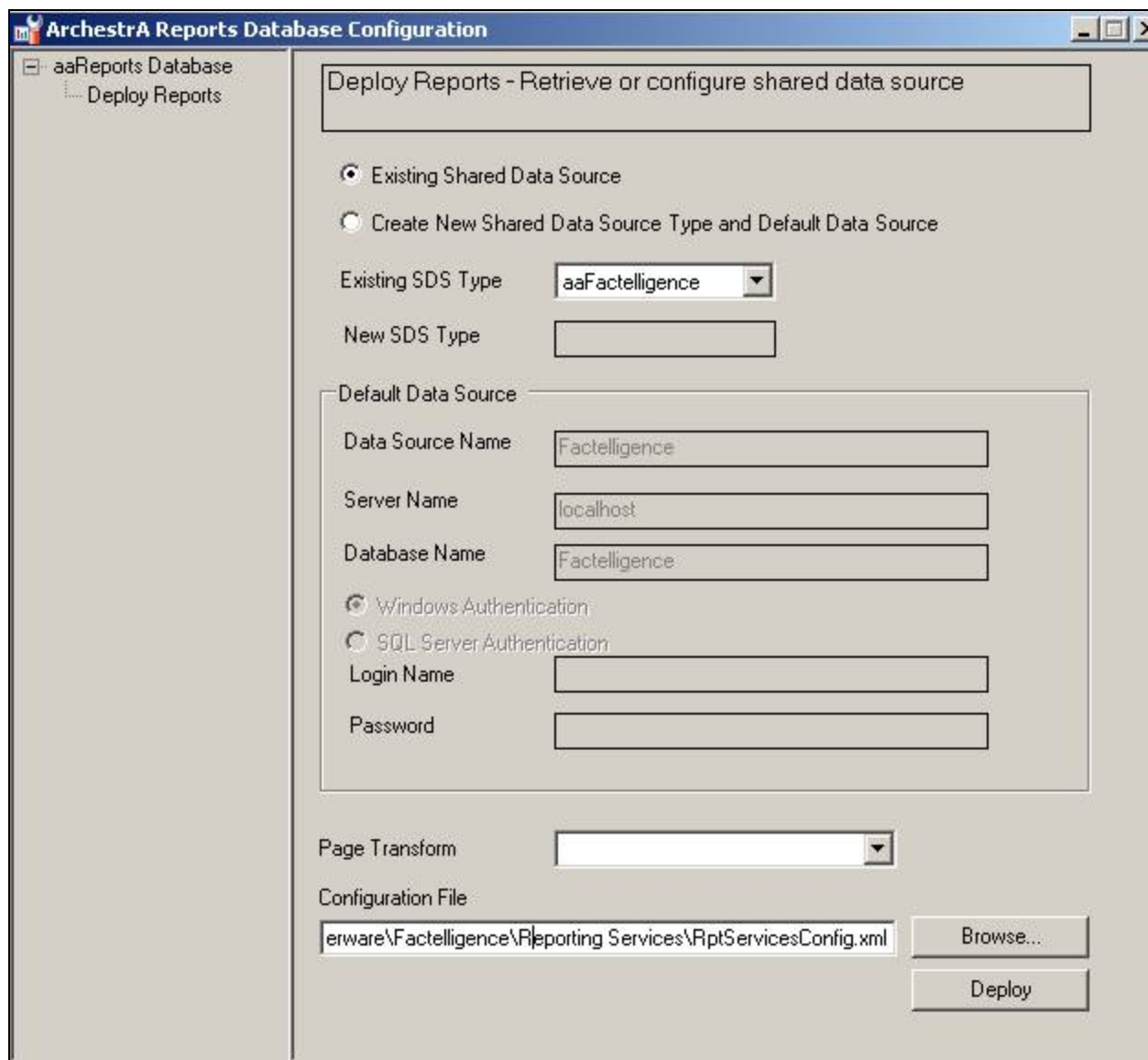
FIGURE 2: DEPLOY ARCHESTRA REPORTS UTILITY

7. Open Wonderware Information Server (WIS). You should see the reports displayed in the WIS System Panel.

After Patch Installation is Complete

1. Re-enable full Middleware server(s) using Component Services > Wonderware Factelligence COM+.

2. Restart Factelligence Service (and Factory Connector(s) if used).

3. Redeploy platforms that host Utilization Capability Objects (UCOs), Factelligence .NET Controls, and/or Factelligence Script library.

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For technical support questions, send an e-mail to **support@wonderware.com**.

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