


# Step by step upgrade process


 This documentation page describes a legacy method of upgrading CAST AIP. This documentation is no longer maintained and may contain obsolete information. You should instead refer to [Upgrade process](#).

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- [Step 2 - Upgrade combined installation](#)
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- [Step 3 - Upgrade the CAST AIP Measurement Service schema](#)
- [Next step](#)

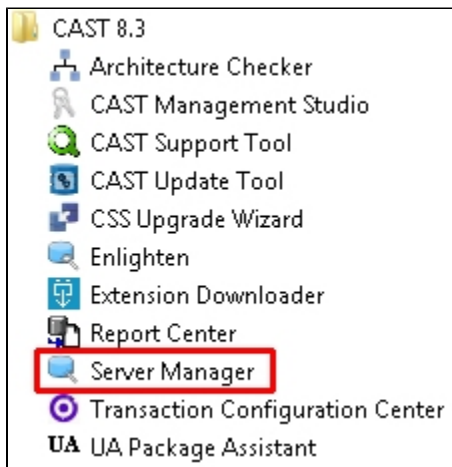
## Target audience:

CAST AI Administrators

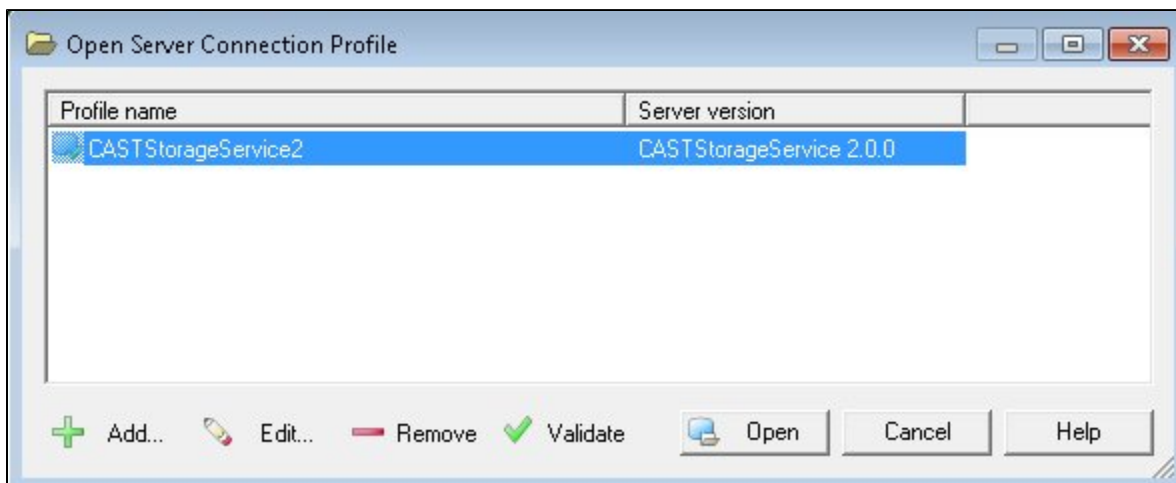
 **Summary:** step-by-step instructions for upgrading to the new release of CAST AIP. Unless otherwise specified, **CAST Server Manager** must be run from the **new release** of CAST AIP.

## Step 1 - Run the CAST Server Manager tool

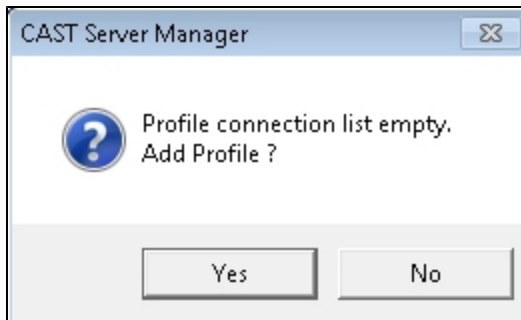
Run the **CAST Server Manager** tool from the new release of CAST AIP in the Windows Start menu (you can also find it in the CAST AIP installation folder - called **servman.exe**):



The **Open Server Connection Profile** dialog will then be displayed allowing you to connect to the RDBMS server hosting the CAST AIP schemas you wish to upgrade. A connection profile to a CAST Storage Service will be available in the dialog box if, during the installation of the new release of CAST AIP, a CAST Storage Service was detected on the current workstation:



**i** If no connection profiles are available a message will be displayed as shown below. Please create a **new** connection profile to the **CAST Storage Service** on which the **CAST AIP schemas** you wish to upgrade are installed:



Select the profile you require and click **Open**

## Step 2 - Upgrade combined installation

This step describes the upgrade process for upgrading:

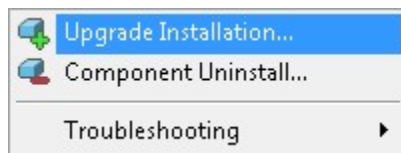
- The **Management Service schema**
- All associated **Analysis** and **Dashboard Service schemas**
- All associated **Applications**
- All associated **Assessment Models**
- Associated **Delivery folder**
- Optionally upgrading existing and/or installing new **Extensions**

**i** Note that this step must be **repeated** for **each Management Service schema and associated items** that you would like to upgrade.

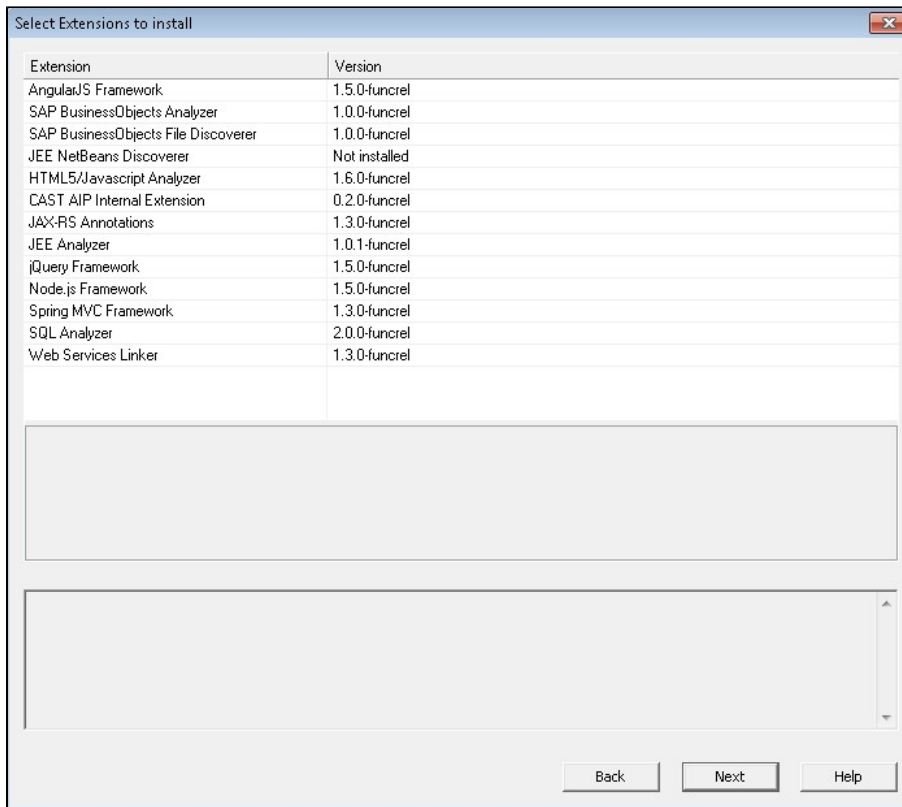
Open CAST Server Manager as detailed in **Step 1**. CAST Server Manager displays all the **upgradable Combined Installations** located on the host RDBMS under the **Combined Installations (Out-of-date)** node. In the image below, the highlighted set of CAST AIP schemas (installed as part of a **Combined Installation**) has "**Upgrades Available**", indicating that they can be upgraded:

	Schema Name	Installed Product	Upgrade Status
Combined Installations (Up-to-date)			
Combined Installations (Out-of-date)			
v826	v826_mngt	CAST Management Studio Base (Version: 8.2.6.1)	Upgrade Available
	v826_central	Central Base (Version: 8.2.6.1)	Upgrades Available
	v826_local	Knowledge/Local Base (Version: 8.2.6.1)	Upgrades Available
Measurement Services			
Unmanaged Services			

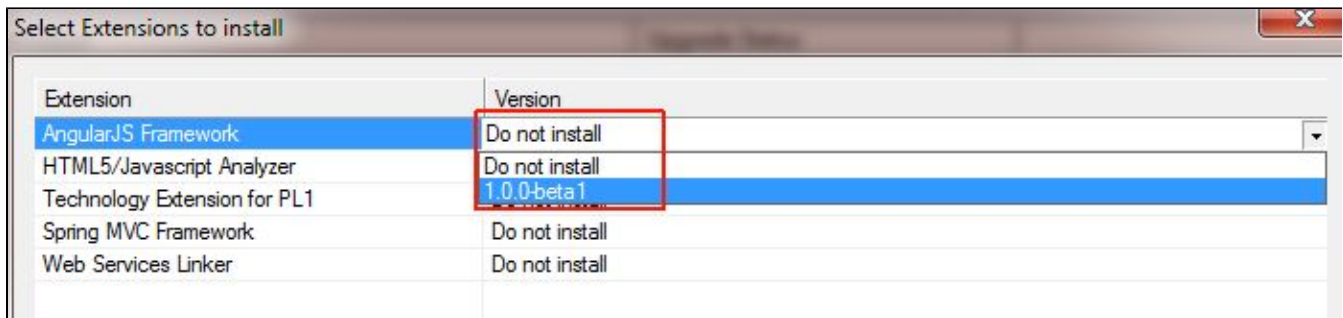
- Select (in the left hand panel) the root item of a set of schemas (installed as part of a **Combined Installation**) that you would like to upgrade and then click **Schema Installation > Upgrade Installation**:



- The wizard "**Select Extensions to install**" is then displayed:



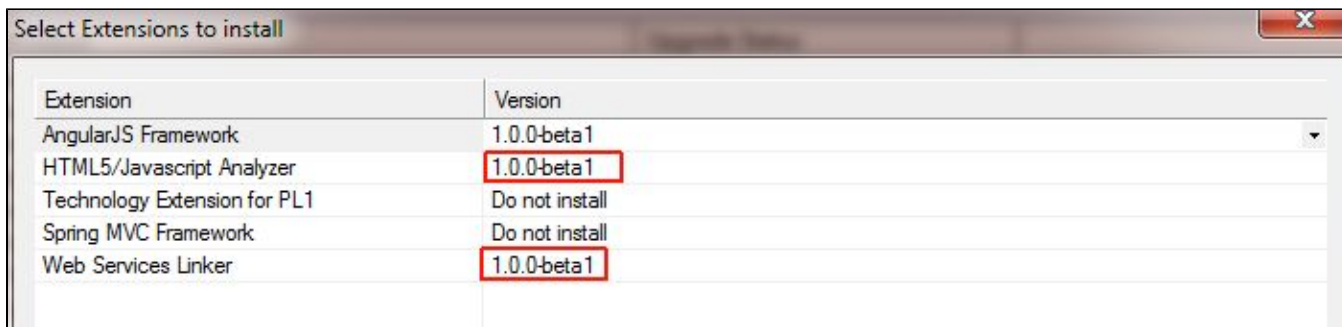
- You now need to choose the **Version** of the Extension you would like to upgrade/install. To do so use the drop down list in the **Version** column:



Note:

- extensions shipped with CAST AIP and **not already installed** will be pre-selected for installation and it will not be possible to change this
- any previously installed extensions will **not be automatically selected for upgrade**, even if a more recent version of an extension is shipped with the new release of AIP or has been downloaded to the workstation manually. To benefit from latest improvements and bug fixing in the most recent extension version, you need to **explicitly select the new release of the extension for upgrade**
- if you see the **<all users dir>** option this indicates that custom legacy Universal Analyzer language packs exist in **<CAST\_ALL\_US ERS\_PATH>** and will be installed as part of the upgrade process (see also related note in [Preparing for upgrade](#)).

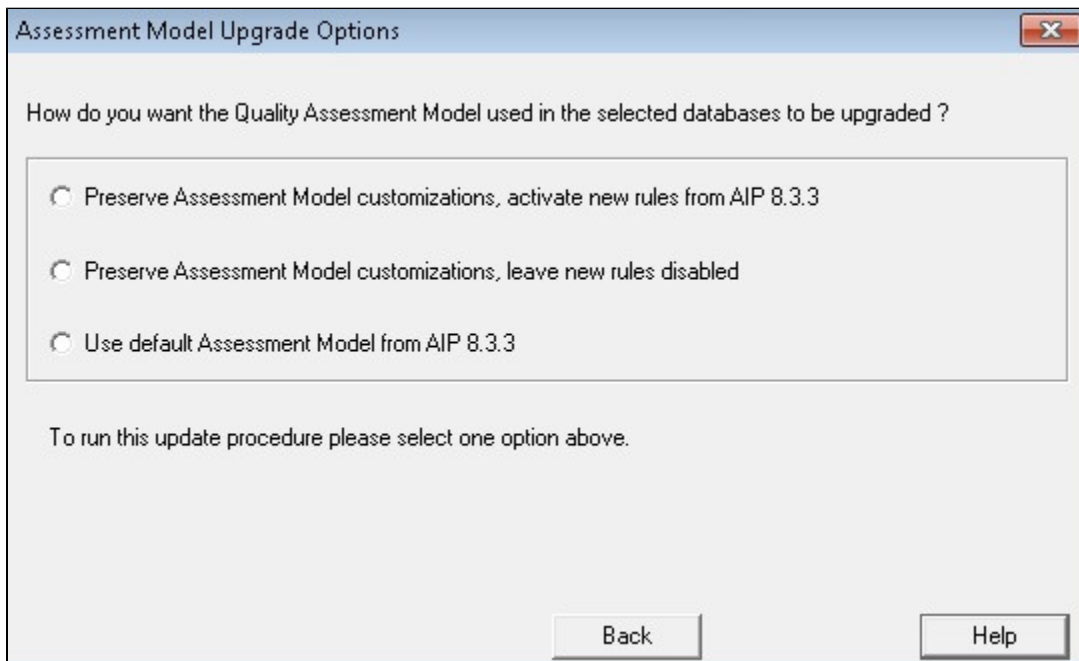
- Any additional extensions that your selected extension requires (i.e. **Dependencies**) will also be selected for upgrade/installation automatically:



The screenshot shows a dialog box titled "Select Extensions to install". It contains a table with two columns: "Extension" and "Version". The table lists five extensions: AngularJS Framework (1.0.0-beta 1), HTML5/Javascript Analyzer (1.0.0-beta 1), Technology Extension for PL1 (Do not install), Spring MVC Framework (Do not install), and Web Services Linker (1.0.0-beta 1). The version numbers for the first, second, and fifth rows are highlighted with red boxes.

Extension	Version
AngularJS Framework	1.0.0-beta 1
HTML5/Javascript Analyzer	1.0.0-beta 1
Technology Extension for PL1	Do not install
Spring MVC Framework	Do not install
Web Services Linker	1.0.0-beta 1

- Once all required extensions have been selected for installation/upgrade, click the **Next** button to continue.
- The wizard **Assessment Model Upgrade Options** is then displayed. You will be asked to choose an option with regard to the handling of the Assessment Model during the upgrade - note that **no option will be pre-selected** so you **MUST** choose an option that meets your needs (see [Preparing for upgrade](#) for an explanation of the available options):



The screenshot shows a dialog box titled "Assessment Model Upgrade Options". It contains the question "How do you want the Quality Assessment Model used in the selected databases to be upgraded ?" and three radio button options: "Preserve Assessment Model customizations, activate new rules from AIP 8.3.3", "Preserve Assessment Model customizations, leave new rules disabled", and "Use default Assessment Model from AIP 8.3.3". Below the options is the instruction "To run this update procedure please select one option above." and two buttons: "Back" and "Help".

How do you want the Quality Assessment Model used in the selected databases to be upgraded ?

Preserve Assessment Model customizations, activate new rules from AIP 8.3.3

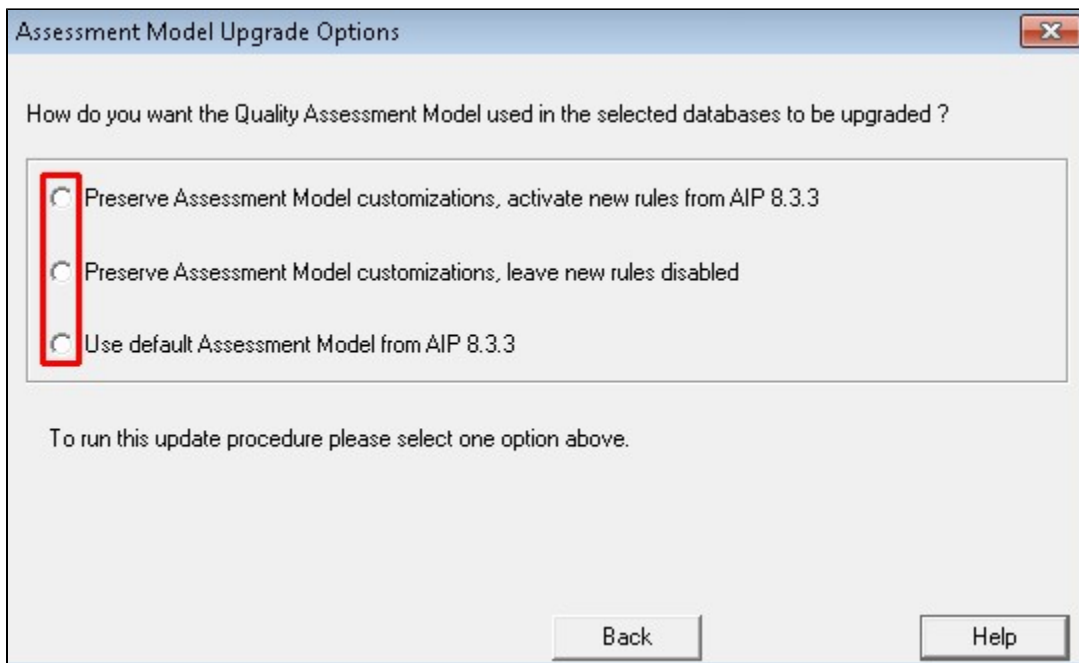
Preserve Assessment Model customizations, leave new rules disabled

Use default Assessment Model from AIP 8.3.3

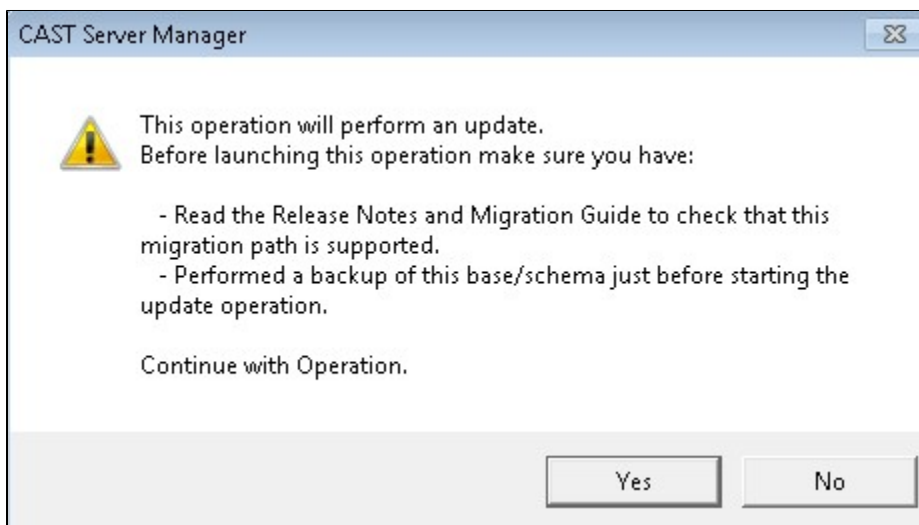
To run this update procedure please select one option above.

Back Help

- Click **Next** to continue after having chosen an option:



- Accept the warning and summary dialog boxes and let the upgrade proceed:



- On completion, the **Combined Installation** is now displayed as **up-to-date**:

	Schema Name	Installed Product	Upgrade Status
<ul style="list-style-type: none"> <li>Combined Installations (Up-to-date)               <ul style="list-style-type: none"> <li>v826</li> </ul> </li> <li>Combined Installations (Out-of-date)</li> <li>Measurement Services</li> <li>Unmanaged Services</li> </ul>	v826_mngt	CAST Management Studio Base (Version: 8.2.6.1)	Up To Date
	v826_central	Central Base (Version: 8.2.6.1)	Up To Date
	v826_local	Knowledge/Local Base (Version: 8.2.6.1)	Up To Date

**Note that:**

- The update of a Management Service schema will be **cancelled** if one of the Analysis or Dashboard Service schemas associated with the respective Management Service schemas is invalid, unreachable or already updated. In this situation CAST recommends restoring your backup database/schemas and starting again.
- The above upgrade process will retain your existing CAST AIP **global license key** for use with the new release of CAST AIP.

## Logs and error numbers

All logs associated with the combined schema installation upgrade are stored in the following location by default:

%PROGRAMDATA%\CAST\CAST\Logs\ServMan

The following section lists the error numbers that may be returned when attempting to run the upgrade:

Number	Description	Solution
3001	An attempt was made to upgrade Application schemas that were installed with a version of AIP Core 7.3.x. This is not supported.	Ensure that <b>all Application schemas</b> involved in the upgrade are installed with <b>AIP Core 8.3.x</b> .
3002	An attempt was made to upgrade Application schemas in which no snapshot exists.	Ensure that <b>at least one Snapshot</b> exists in the Application schemas you want to upgrade.
3003	An attempt was made to upgrade Application schemas where not all schemas are installed with the same release of AIP Core.	Ensure that <b>all Application schemas</b> involved in the upgrade are installed with the <b>same release of AIP Core</b> .
3004	The Application schemas you want to upgrade have no Delivery folder defined.	Only occurs when attempting to upgrade from <b>AIP Core 7.0.x</b> , which is not supported.
3005	The Delivery folder associated to the Application schemas you want to upgrade cannot be found on disk or is not accessible.	Ensure that the <b>Delivery folder</b> associated to the Application schemas you want to upgrade exists and can be accessed from the server you are running the upgrade on.
3006	The Delivery folder associated to the Application schemas you want to upgrade is more recent than the current release of CAST Server Manager you are using.	Ensure that you are using the <b>correct release of CAST Server Manager</b> to perform the upgrade and that you are not attempting to perform an upgrade on a Delivery folder that is <b>assigned to a more recent release of AIP Core</b>
3007	An error exists in the AIP Core metamodel that is preventing the upgrade from proceeding.	Please <a href="#">contact CAST Support</a> for help with this error.
3008	An SQL error has occurred during the upgrade process.	Please <a href="#">contact CAST Support</a> for help with this error.

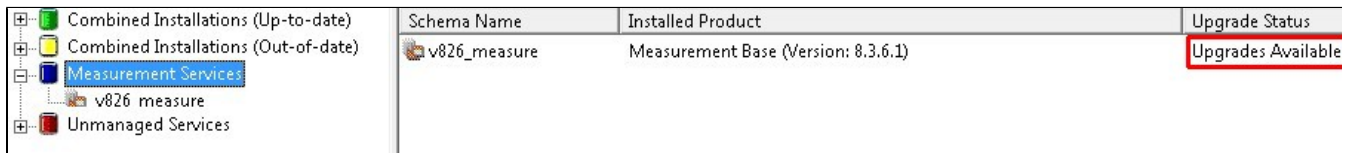
CAST provides a dedicated **batch file** that can automate the upgrade of a combined installation including AIP core and extensions. You can find out more about this in [Automating the CAST AIP Upgrade process](#). Ensure you have read [Preparing for upgrade](#) and completed any required actions before using the batch file.

## Step 3 - Upgrade the CAST AIP Measurement Service schema

This step describes the upgrade process for upgrading the **Measurement Service schema** used with the **Health Dashboard**.

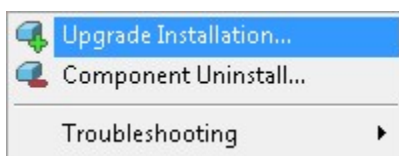
**i** Note that a CAST AIP Measurement Service schema can be identified by the value "**Measurement Base for General purpose**" in the column "**Installed Product**". If the Measurement Service schema was installed as part of a **Combined Installation** (with other CAST AIP schemas), the schema name will end with "**\_measure**".

- Run CAST Server Manager as detailed in **Step 1**
- CAST Server Manager displays all the CAST AIP Measurement Service schemas located on the host CAST Storage Service under the **Measurement Services** node. In the image below, the highlighted Measurement Service has "**Upgrades Available**", indicating that it can be upgraded:



Schema Name	Installed Product	Upgrade Status
v826_measure	Measurement Base (Version: 8.3.6.1)	Upgrades Available

- Select the Measurement Service and then click **Schema/Database Installation > Upgrade Installation**:



- Accept the warning and summary dialog boxes and let the upgrade proceed.
- On completion, the Measurement Service is now displayed as "**Up To Date**":

	Schema Name	Installed Product	Upgrade Status
<ul style="list-style-type: none"> <li>Combined Installations (Up-to-date)</li> <li>Combined Installations (Out-of-date)</li> <li>Measurement Services</li> <li>  v826 measure</li> <li>Unmanaged Services</li> </ul>	v826_measure	Measurement Base (Version: 8.3.6.1)	Up To Date

- Run the following command line for CAST Server Manager (**servman.exe**):

```
SERVMAN.EXE -INSTALL_CONFIG_FILE ("C:\some_file.xml") -UPGRADE -LOG (C:\log.castlog, -IMMEDIATE)
```

- Where **C:\some\_file.xml** contains the following, adapted to your environment (change all items surrounded by [ ... ]):

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<CAST-AutomaticInstall>
<!-- Use either ServerName= or ConnectionString= -->
<!-- <ServerInstall ProfileSystem="[PROFILE_NAME]" ServerType="CASTStorageService" UserSystem="operator"
SystemPassword="CastAIP" ServerName="[SERVER]:2280" > -->
<ServerInstall ProfileSystem="[PROFILE_NAME]" ServerType="CASTStorageService" UserSystem="operator"
SystemPassword="CastAIP" ConnectionString="LIBPQ:[SERVER]:2280" >
  <InstallDatabase DbName="[MEASUREMENT_SERVICE_SCHEMA_NAME]">
    <PackName>AAD_MAIN</PackName>
  </InstallDatabase>
</ServerInstall>
</CAST-AutomaticInstall>
```

**i** Notes:

- A connection profile is required to use the CLI, therefore you may need to run CAST Server Manager in GUI mode and create one if none is available.
- You can find out more information about the CAST Server Manager CLI in [Automating CAST Server Manager installation tasks](#).

## Next step

Please see [Post upgrade action items](#) for information about what to do next.