{JIRA Case: <http://jira.pentaho.com/browse/BACKLOG-12111>}

{7.0 MindTouch Article: <https://help.pentaho.com/Documentation/7.1/0T0/Upgrade_Pentaho_Servers_and_Design_Tools>}

{Updated 7.1 MindTouch Article: <https://help.pentaho.com/Documentation/7.1/0T0/Upgrade_Pentaho_Servers_and_Design_Tools>}

Upgrade Pentaho Servers and Design Tools

The upgrade process is similar whether you are upgrading the Pentaho Business Analytics (BA) Server or the Data Integration (DI) Server.

***Note****: This process assumes you [manually installed](https://help.pentaho.com/Documentation/7.0/0F0/0P0) your original BA Server or original DI Server.*

# Upgrade the Pentaho Business Analytics Server

After you finish the prerequisite tasks located in [Before You Begin](https://help.pentaho.com/Documentation/7.0/0T0#Before_You_Begin), there are a few tasks that you will need to complete in order to upgrade to Pentaho 7.0 successfully.

These sections will guide you through the remaining steps of the Pentaho BA upgrade process:

* Backup Your BA Server Configuration and Solutions Files
* Install the Pentaho Server 7.0
* Restore Your BA Server Configuration and Solutions Files
  + Enable Logging Before Restoring Files
* Update the BA Server Configuration
* Test Your BA Server
* Update Your BA Design Tools

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## Step 3: Restore Your BA Server Configuration and Solutions Files

After you have unpacked your Pentaho 7.0 bundle, restore your Pentaho files to your 7.0 instance with the restore utility. Use the following steps to apply the BAServerConfigAndSolutionsRestore utility:

1. Delete all the content in the Pentaho Server 7.0 pentaho-solutions/system/default-content folder.
2. Open a cmd prompt on the BA Server host machine.
3. In the prompt, run the BAServerConfigAndSolutionsRestore utility to restore your data from the .zip files located in your user home folder.

|  |  |
| --- | --- |
| ***Windows*** | BAServerConfigAndSolutionsRestore "C:\Program Files\pentaho\server\pentaho-server" |
| ***Linux*** | ./BAServerConfigAndSolutionsRestore.sh /opt/home/pentaho/server/pentaho-server |

1. If you are not going to enable logging before restoring files, [update the BA Server configuration](https://help.pentaho.com/Documentation/7.0/0T0/Upgrade_Pentaho_Servers_and_Design_Tools#Step_4:_Update_the_BA_Server_Configuration).

#### Optional: Enable Logging Before Restoring Files

Before you restore your BA Server configuration and solutions files, enable logging in the logging configuration file:

1. Locate the /biserver-ee/tomcat/webapps/pentaho/WEB-INF/classes directory and open the log4j.xml file with any text editor.
2. Find the parameter for Threshold and verify its value is set to INFO. If it is not set to INFO, change the value as shown here:

|  |  |
| --- | --- |
| **Old param value** | <param name="Threshold" value="ERROR"/> |
| **New param value** | <param name="Threshold" value="INFO"/> |

1. Verify whether the following category is in the log4j.xml file. If it is not in the file, then add it:

<category name="org.pentaho.platform.engine.core.system.status">

<priority value="INFO"/>

</category>

1. Save and close the log4j.xml file.

## Step 4: Update the BA Server Configuration

After you have restored your BA Server configuration and solution files, make the following .xml file changes before starting the server.

1. Open the web.xml file located here pentaho-server/tomcat/webapps/pentaho/WEB-INF.
2. Make the following filter class value and parameter value changes:

|  |  |
| --- | --- |
| Old Text | <filter>    <filter-name>Spring Security Filter Chain Proxy</filter-name>    <filter-class>org.springframework.security.util.FilterToBeanProxy</filter-class>  <init-param>  <param-name>targetBean</param-name>  <param-value>filterChainProxy</param-value>    </init-param>  </filter> |
| New Text | <filter>    <filter-name>Spring Security Filter Chain Proxy</filter-name>    <!--@deprecate FilterToBeanProxy in favour of DelegatingFilterProxy-->    <filter-class>org.springframework.web.filter.DelegatingFilterProxy</filter-class>    <init-param>      <param-name>targetBeanName</param-name>      <param-value>filterChainProxy</param-value>    </init-param>  </filter> |

1. In the same web.xml file, make the following listener value changes:

|  |  |
| --- | --- |
| Old Text | <listener>    <listener-class>org.springframework.security.ui.session.HttpSessionEventPublisher</listener-class>  </listener> |
| New Text | <listener>    <listener-class>org.springframework.security.web.session.HttpSessionEventPublisher</listener-class>  </listener> |

1. Save and close the web.xml file.
2. Open the plugin.xml file located here /pentaho-solutions/system/pentaho-interactive-reporting.
3. Search the plugin.xml file for the <content-generator id=”Iadhoc” type=”iadhoc”> block.
4. Below that add the following block:

<content-generator id="iadhocasync" type="iadhocasync">

        <classname>com.pentaho.iadhoc.service.BackgroundJobAdHocGenerator</classname>

        <title>Adhoc Async Report Viewer</title>

</content-generator>

1. Save and close the plugin.xml file.
2. Open the settings.xml file located here server/pentaho-server/pentaho-solutions/system/reporting/settings.xml.
3. Update the query-limit-ui-enabled setting to true and the query-limit setting to 0 as shown in the following example lines of code:

<!-- Enabled or disabled row limit control on UI. No value means disabled.-->

<query-limit-ui-enabled>true</query-limit-ui-enabled>

<!-- The maximum number of rows that will be rendered in a report viewer.-->

<query-limit>0</query-limit>

1. Save and close the settings.xml file.
2. If you modified any of the following system configuration files in the pentaho-solutions/system folder of your previous installation, these modifications must be applied to the same Pentaho 7.0 files:

* jackrabbit/repository.xml
* applicationContext-logging.xml.original
* applicationContext-pentaho-security-jackrabbit.xml.original
* applicationContext-pentaho-security-jdbc.xml.original
* applicationContext-pentaho-security-ldap.xml.original
* applicationContext-pentaho-security-memory.xml.original
* applicationContext-spring-security-cas.xml.original
* applicationContext-spring-security-jackrabbit.xml.original
* applicationContext-spring-security-jdbc.xml.original
* applicationContext-spring-security-ldap.xml.original
* applicationContext-spring-security-memory.xml.original
* applicationContext-spring-security-superuser.xml.original
* applicationContext-spring-security.xml.original
* pentahoObjects.spring.xml.original
* pentahoServices.spring.xml.original
* repository.spring.xml.original
* log4j.xml – which is located at server/pentaho-server/tomcat/webapps/Pentaho/WEB-INF/classes/log4j.xml

***Note****: The upgrade utility contains a set of spring configuration files in their original 6.1.0.7 state. After the utility scripts run, determine the differences between your 6.1 files and these originals, then apply these changes to the 7.0 configuration files.*

***Note****: The jackrabbit/repository.xml file contains database connection information. Please ensure this database connection information is properly carried over from your 6.1 version of the repository file into the 7.0 version of the file.*

1. [Start the BA Server](https://help.pentaho.com/Documentation/7.0/0H0/Start_and_Stop_the_Pentaho_Server_for_Configuration" \o "Start and Stop the Pentaho Server for Configuration).

Make sure not to interrupt the BA Server the first time you start it after restoring your data.

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# Upgrade the Pentaho Data Integration Server

After you finish the prerequisite tasks located in [Before You Begin](https://help.pentaho.com/Documentation/7.0/0T0#Before_You_Begin), there are a few tasks that you will need to complete in order to upgrade to Pentaho 7.0 successfully.

These sections will guide you through the remaining steps of the Pentaho DI upgrade process:

* Backup Your DI Server Configuration and Solutions Files
* Install the Pentaho Server 7.0
* Restore Your DI Server Configuration and Solutions Files
  + Optional Step: Enable Logging Before Restoring Files
* Update the DI Server Configuration
* Update Your Pentaho DI Client Tool
* Test Your DI Server

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## Step 3:  Restore Your DI Server Configuration and Solutions Files

After you have unpacked your Pentaho 7.0 bundle, restore your custom data to your 7.0 instance with the restore utility. Use the following steps to apply the DIServerConfigAndSolutionsRestore utility:

1. Delete all the content in the Pentaho Server 7.0 pentaho-solutions/system/default-content folder.
2. Open a cmd prompt on the DI Server host machine.
3. In the prompt, run the DIServerConfigAndSolutionsRestore utility to restore your data from the .zip files in your user home folder.

|  |  |
| --- | --- |
| ***Windows*** | DIServerConfigAndSolutionsRestore "C:\Program Files\pentaho\server\pentaho-server" |
| ***Linux*** | ./DIServerConfigAndSolutionsRestore.sh /opt/custom software/pentaho/server/pentaho-server |

1. If you are not going to enable logging before restoring files, [update the DI Server configuration](https://help.pentaho.com/Documentation/7.0/0T0/Upgrade_Pentaho_Servers_and_Design_Tools#Step_4:_Update_the_DI_Server_Configuration).

### Optional: Enable Logging Before Restoring Files

Before you restore your DI Server configuration and solutions files, enable logging in the logging configuration file:

1. Locate the /data-integration-server/tomcat/webapps/pentaho/WEB-INF/classes directory and open the log4j.xml file with any text editor.
2. Find the parameter for Threshold and verify its value is set to INFO. If it is not set to INFO, change the value as shown here:

|  |  |
| --- | --- |
| **Old param value** | <param name="Threshold" value="ERROR"/> |
| **New param value** | <param name="Threshold" value="INFO"/> |

1. Verify whether the following category is in the log4j.xml file. If it is not in the file, then add it:

<category name="org.pentaho.platform.engine.core.system.status">

<priority value="INFO"/><priority value="INFO"/>

</category>

1. Save and close the log4j.xml file.

## Step 4: Update the DI Server Configuration

After restoring your DI Server configuration and solution files and enabling the DI Server, update your configuration by making changes to the web.xml file, the licenseManagerAdmin.js file, and any configuration files you modified in your previous installation.

***Note****: You must complete the upgrade process for the BA Server prior to enabling the DI Server.*

1. Open the web.xml file located in the pentaho-server/tomcat/webapps/pentaho/WEB-INF folder.
2. Make the following filter value changes:

|  |  |
| --- | --- |
| Old Text | <filter>  <filter-name>Pentaho Web Context Filter</filter-name>  <filter-class>org.pentaho.platform.web.http.filters.PentahoWebContextFilter</filter-class>  </filter> |
| New Text | <filter>  <filter-name>Pentaho Web Context Filter</filter-name>  <filter-class>com.pentaho.platform.web.http.filters.PentahoEnterpriseWebContextFilter</filter-class>  </filter |

1. In the same web.xml file, make the following filter class value and parameter value changes:

|  |  |
| --- | --- |
| Old Text | <filter>  <filter-name>Spring Security Filter Chain Proxy</filter-name>    <filter-class>org.springframework.security.util.FilterToBeanProxy</filter-class>  <init-param>  <param-name>targetBean</param-name>  <param-value>filterChainProxy</param-value>  </init-param>  </init-param> |
| New Text | <filter>  <filter-name>Spring Security Filter Chain Proxy</filter-name>  <!--@deprecate FilterToBeanProxy in favour of DelegatingFilterProxy-->  <filter-class>org.springframework.web.filter.DelegatingFilterProxy</filter-class>  <init-param>  <param-name>targetBeanName</param-name>  <param-value>filterChainProxy</param-value>  </init-param>  </filter> |

1. And then, make the following listener value changes:

|  |  |
| --- | --- |
| Old Text | <listener>  <listener-class>org.springframework.security.ui.session.HttpSessionEventPublisher</listener-class>  </listener> |
| New Text | <listener>  <listener-class>org.springframework.security.web.session.HttpSessionEventPublisher</listener-class>  </listener> |

1. Save and close the web.xml file.
2. Open the licenseManagerAdmin.js file located in the pentaho-server/pentaho-solution/system/admin-plugin/resources/licenseManagerModule folder.
3. Make the following changes to the context path:

|  |  |
| --- | --- |
| Old Text | window.location = CONTEXT\_PATH + "Home" |
| New Text | window.location = CONTEXT\_PATH + "kettle/status" |

1. Save and close the licenseManagerAdmin.js file.
2. If you modified any of the following system configuration files in the pentaho-solutions/system folder of your previous installation, these modifications must be applied to the same Pentaho 7.0 files:

* jackrabbit/repository.xml
* applicationContext-logging.xml.original
* applicationContext-pentaho-security-jackrabbit.xml.original
* applicationContext-pentaho-security-jdbc.xml.original
* applicationContext-pentaho-security-ldap.xml.original
* applicationContext-pentaho-security-memory.xml.original
* applicationContext-spring-security-cas.xml.original
* applicationContext-spring-security-jackrabbit.xml.original
* applicationContext-spring-security-jdbc.xml.original
* applicationContext-spring-security-ldap.xml.original
* applicationContext-spring-security-memory.xml.original
* applicationContext-spring-security-superuser.xml.original
* applicationContext-spring-security.xml.original
* pentahoObjects.spring.xml.original
* pentahoServices.spring.xml.original
* repository.spring.xml.original
* log4j.xml – which is located at server/pentaho-server/tomcat/webapps/Pentaho/WEB-INF/classes/log4j.xml

***Note****: The upgrade utility contains a set of spring configuration files in their original 6.1.0.7 state. After the utility scripts run, determine the differences between your 6.1 files and these originals, then apply these changes to the 7.0 configuration files.*

***Note****: The jackrabbit/repository.xml file contains database connection information. Please ensure this database connection information is properly carried over from your 6.1 version of the repository file into the 7.0 version of the file.*

1. [Start the DI Server](https://help.pentaho.com/Documentation/7.0/0H0/Start_and_Stop_the_Pentaho_Server_for_Configuration" \o "Start and Stop the Pentaho Server for Configuration).

Make sure not to interrupt the DI Server the first time you start it after restoring your data.