

Profiles Research Networking Software Version 2.x.x Upgrade Guide

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Table of Contents

Upgrading from Version 2.x.x to 3.0.0	2
Upgrading from Version 2.0.0 to Version 2.5.1	2
Upgrading from Version 2.5.1 to Version 2.6.0	2
Upgrading from Version 2.6.0 to Version 2.7.0	3
Upgrading from Version 2.7.0 to Version 2.8.0	3
Upgrading from Version 2.8.0 to Version 2.9.0	4
Upgrading from Version 2.9.0 to Version 2.10.0	4
Upgrading from Version 2.10.0 to Version 2.10.1	5
Upgrading from Version 2.10.1 to Version 2.11.0	5
Upgrading from Version 2.11.0 to Version 2.11.1	6
Upgrading from Version 2.11.1 to Version 2.12.0	6
Upgrading from Version 2.12.0 to Version 3.0.0	7

Upgrading from Version 2.x.x to 3.0.0

This document describes how to upgrade from a prior version of profiles to version 3.0.0. This must be done prior to upgrading to later versions.

The Profiles RNS 2.0.0 software file includes instructions on how to upgrade older versions to 2.0.0. Profiles RNS 2.0.0 can be downloaded from <http://profiles.catalyst.harvard.edu/software>. This must be done prior to following the instructions in this document.

Profiles RNS includes database scripts to upgrade prior versions of the database to Profiles RNS 3.0.0. This will preserve data, URIs, mapping tables, and ontology extensions. However, all old .NET code (except for the web.config file) will need to be replaced with the latest version. As a result, you will need to reapply any .NET customizations you have made, such as look-and-feel changes, to the new code.

Below are instructions on how to upgrade from Profiles RNS version 2.0.0 onwards. Note that you cannot upgrade directly from older versions, you must follow each set of database upgrade scripts sequentially. Redundant steps have been crossed out using ~~strike through~~. If you don't wish to upgrade all the way to 3.0.0 you will need to complete some of these steps.

IMPORTANT: Make a backup of your existing Profiles RNS database before applying any of the upgrade steps described below.

Upgrading from Version 2.0.0 to Version 2.5.1

- 1) Open the VersionUpgrade_2.0.0_2.5.1\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.0.0_2.5.1\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Modify lines 25, 26 and 27 so that it points to the location of the PRNS_1.1.owl, ORNG_1.0.owl and InstallData.xml files that came with Profiles RNS 2.7.0 (not older versions of the files). These files have to be on the database server, not your local machine. Click the execute button to run the script. Note that this script makes changes to many of the tables that control data loading and presentation. If you have made changes to any of these tables, then you may have to reapply those changes.
- 3) ~~Follow the instructions in Upgrading from Version 2.5.1 to Version 2.6.0.~~

Upgrading from Version 2.5.1 to Version 2.6.0

- 1) Open the VersionUpgrade_2.5.1_2.6.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.5.1_2.6.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Click the execute button to run the script. Note that this script makes changes to many of the tables that control data loading and presentation. If you have made changes to any of these tables, then you may have to reapply those changes.
- 3) ~~Profiles 2.6.0 requires an upgraded version of Shindigorng.war. There is no need to make any changes to the Tomcat Connectors. If Apache Tomcat 7 is used there is no need to make any changes to Tomcat. If an older version of Apache Tomcat is in use, it must be upgraded to Version 7.~~
 - a. ~~Stop Apache Tomcat~~
 - b. ~~Navigate to the Tomcat webapps folder~~

- ~~c. Delete the shindigorng folder and the existing sindigorng.war file~~
- ~~d. Copy the sindigorng.war file from the version 2.7.0 zip to the webapps folder.~~
- ~~e. Overwrite the existing shindigorng.properties with the file from the version 2.5.1 zip~~
- ~~f. Update the following values (orng.dbURL, orng.dbUser, orng.dbPassword and orng.systemDomain) in the shindigorng.properties file as described in in section 3 of this document.~~
- ~~g. Restart Apache Tomcat~~
- ~~4) Merge the appSettings and ORNG sections of your web.config file with the version in Website\SourceCode\Profiles\Profiles.~~
- ~~5) Follow the instructions in Upgrading from Version 2.6.0.~~

Upgrading from Version 2.6.0 to Version 2.7.0

- 1) Open the VersionUpgrade_2.6.0_2.7.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.6.0_2.7.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Click the execute button to run the script. Note that this script makes changes to many of the tables that control data loading and presentation. If you have made changes to any of these tables, then you may have to reapply those changes.
- ~~3) The Profiles RNS 2.7.0 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.~~
- 4) Edit your existing web.config file to add the following keys:
 - a. `<add key="ShowOtherOptions" value="true"/>`
 - b. `<add key="Login.PresentationXML" value="LoginFormPresentation"/>`
- ~~5) Profiles RNS 2.7.0 does not include any changes to the APIs. These do not need to be upgraded.~~

Upgrading from Version 2.7.0 to Version 2.8.0

- 1) Open the VersionUpgrade_2.7.0_2.8.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.7.0_2.8.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Click the execute button to run the script. Note that this script makes changes to the PresentationXML. If you have previously edited these XML documents, then you may have to reapply those changes.
- ~~3) The Profiles RNS 2.8.0 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.~~

- 4) ~~Profiles RNS 2.8.0 does not include any changes to the APIs. These do not need to be upgraded.~~

Upgrading from Version 2.8.0 to Version 2.9.0

- 1) Open the VersionUpgrade_2.8.0_2.9.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.8.0_2.9.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Modify line 31 so that it points to the location of the PRNS_1.2.owl file that came with Profiles RNS 2.9.0 (not an older version of this file). This file must be on the database server, not your local machine. Click the execute button to run the script. Note that this script makes changes to the PresentationXML. If you have previously edited these XML documents, then you may have to reapply those changes.
- 3) ~~The Profiles RNS 2.9.0 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.~~
- 4) Edit your existing web.config file to add the following keys:
 - a. `<add key="GoogleAnalytics.TrackingID" value="" />`
 - b. `<add key="GrantEndPoint"`
`value="http://profiles.catalyst.harvard.edu/services/NIHGrants/SearchGrants.asp"`
`/>`
- 5) ~~Navigate to the webapps folder of your apache tomcat installation. Stop the apache tomcat service. Delete the shindigorgng folder and replace the shindigorgng.war file with the version in the ProfilesRNS\Website\ORNG folder of this release. Restart tomcat to deploy the new version.~~
- 6) ~~Profiles RNS 2.9.0 does not include any changes to the APIs. These do not need to be upgraded.~~

Upgrading from Version 2.9.0 to Version 2.10.0

- 1) Open the VersionUpgrade_2.9.0_2.10.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.9.0_2.10.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Click the execute button to run the script.
- 3) ~~Open the PubMedDisambiguation_GetPubMEDXML.sql file for your database version. Modify this file for your configuration by replacing \$(YourProfilesDatabaseName) with your database name, and \$(YourProfilesServerName) with your database server name.~~
- 4) ~~Delete or rename and disable your existing PubMedDisambiguation_GetPubMEDXML job and run PubMedDisambiguation_GetPubMEDXML.sql to create a new job. Apply any scheduling you had on the existing job to the new job.~~
- 5) Follow the instructions in "Loading Person Data: Part 5 – Obtaining Funding Data" to add organization names for funding disambiguation.
- 6) ~~Install the ExporterDisambiguation_GetFunding.dstx package for your database version. See "Loading Person Data: Part 1 – Importing SSIS Packages into SQL Server msdb Database" for detailed instructions.~~

- 7) ~~Open the ExporterDisambiguation_GetFunding.sql file. Modify this file for your configuration by replacing \$(YourProfilesDatabaseName) with your database name, and \$(YourProfilesServerName) with your database server name. Run ExporterDisambiguation_GetFunding.sql to create the funding disambiguation job. Apply your chosen schedule to this job.~~
- 8) ~~The Profiles RNS 2.10.0 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.~~
- 9) ~~Profiles RNS 2.10.0 does not include any changes to the APIs. These do not need to be upgraded.~~

Upgrading from Version 2.10.0 to Version 2.10.1

- 1) Open the VersionUpgrade_2.10.0_2.10.1\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) ~~If you are using SQL Server 2008, install the SQL2008\ExporterDisambiguation_GetFunding.dtsx file. See "Loading Person Data: Part 1—Importing SSIS Packages into SQL Server msdb Database" for detailed instructions. This fixes a bug that only exists in the SQL Server 2008 version of this file. No action is needed for other versions of SQL Server.~~
- 3) ~~The Profiles RNS 2.10.1 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.~~
- 4) ~~Profiles RNS 2.10.1 does not include any changes to the APIs. These do not need to be upgraded.~~

Upgrading from Version 2.10.1 to Version 2.11.0

Profiles 2.11.0 includes an upgrade to .Net 4.6.2. If upgrading from 2.10.1 or prior versions you must reconfigure the webserver and replace the web.config file with the 2.11.0 version.

- 1) Open the VersionUpgrade_2.10.1_2.11.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.10.1_2.11.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Modify line 31 so that it points to the location PRNS_1.3.owl included in the VersionUpgrade_2.10.1_2.11.0 folder. This file must be on the database server, not your local machine. Click the execute button to run the script. Note that this script makes changes to the PresentationXML. If you have previously edited these XML documents, then you may have to reapply those changes.
- 3) Follow the instructions in [Configuring the Webserver](#) and [Installing the Website](#) to install Profiles RNS 2.11.0. You will need use the key values and connection string from your existing web.config file. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.

- 4) Follow the instructions in [Installing the APIs](#) to install Profiles RNS 2.11.0 APIs. You will need use the key values and connection strings from your existing web.config files.

Upgrading from Version 2.11.0 to Version 2.11.1

- 1) Open the VersionUpgrade_2.11.0_2.11.1\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.11.0_2.11.1\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Modify lines 31, 32 and 33 so that it points to the location of the MeSH.xml, SemGroups.xml and SemTypes.xml files that came with Profiles RNS 2.11.1 (not older versions of the files). These files have to be on the database server, not your local machine. Click the execute button to run the script. Note that this script makes changes to the PresentationXML. If you have previously edited these XML documents, then you may have to reapply those changes.
- 3) ~~The Profiles RNS 2.11.1 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.~~
- 4) ~~Profiles RNS 2.11.1 does not include any changes to the APIs. These do not need to be upgraded.~~

Upgrading from Version 2.11.1 to Version 2.12.0

- 1) Open the VersionUpgrade_2.11.1_2.12.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.11.1_2.12.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Click the execute button to run the script. Note that this script makes changes to the PresentationXML. If you have previously edited these XML documents, then you may have to reapply those changes.
- 3) Open the VersionUpgrade_2.11.1_2.12.0\ProfilesRNS_Upgrade_Account.sql file in SQL Management Studio, and then click the execute button to run the script. This will add permissions for the App_Profiles10 account to execute new stored procedures. If you connect to the database using a different account, change username in this file.
- 4) ~~Install the ProfilesRNS_CallPRNSWebservice.dtsx package for your database version. See “Loading Person Data: Part 1—Importing SSIS Packages into SQL Server msdb Database” for detailed instructions.~~
- 5) ~~Open the ProfilesRNS_BibliometricsJob.sql file. Modify this file for your configuration by replacing \$(YourProfilesDatabaseName) with your database name, and \$(YourProfilesServerName) with your database server name. Run ProfilesRNS_BibliometricsJob.sql to create the funding bibliometrics job. Apply your chosen schedule to this job.~~
- 6) ~~Install the ProfilesGeoCode.dtsx package for your database version. See “Loading Person Data: Part 1—Importing SSIS Packages into SQL Server msdb Database” for detailed instructions. This will overwrite your existing ProfilesGeoCode SSIS package.~~

- ~~7) Follow the instructions in the Geocoding section of the install document to create a Google API key and add it to the Geocoding job.~~
- 8) The Profiles RNS 2.12.0 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.
- 9) Google Maps will display with a "For development purposes only" watermark until an API key is added. Create an API key as described in the [Geocoding](#) section of this document, and edit your existing web.config file to add the following keys:
 - a. `<add key=" GoogleMapsKey" value="" />`

Upgrading from Version 2.12.0 to Version 3.0.0

- 1) Open the VersionUpgrade_2.12.0_3.0.0\ProfilesRNS_Upgrade_Schema.sql file in SQL Management Studio, and then click the execute button to run the script.
- 2) Open the VersionUpgrade_2.12.0_3.0.0\ProfilesRNS_Upgrade_Data.sql file in SQL Management Studio. Click the execute button to run the script. Note that this script makes changes to the PresentationXML. If you have previously edited these XML documents, then you may have to reapply those changes.
- 3) Open the VersionUpgrade_2.12.0_3.0.0\ProfilesRNS_Upgrade_Account.sql file in SQL Management Studio, and then click the execute button to run the script. This will add permissions for the App_Profiles10 account to execute new stored procedures. If you connect to the database using a different account, change username in this file.
- 4) Open the VersionUpgrade_2.12.0_3.0.0\ProfilesRNS_MigrateWebsiteData.sql file in SQL Management Studio, and follow the instructions in this script.
- 5) Open the VersionUpgrade_2.12.0_3.0.0\ProfilesRNS_MigrateORNGDataToGenericRDF.sql file in SQL Management Studio. Click the execute button to run the script.
- 6) Install the ProfilesRNS_CallPRNSWebservice.dtsx package for your database version. See "Loading Person Data: Part 1 – Importing SSIS Packages into SQL Server msdb Database" for detailed instructions.
- 7) Open the ProfilesRNS_BibliometricsJob.sql file. Modify this file for your configuration by replacing \$(YourProfilesDatabaseName) with your database name, and \$(YourProfilesServerName) with your database server name. Run ProfilesRNS_BibliometricsJob.sql to create the bibliometrics job. Apply your chosen schedule to this job.
- 8) Follow the instructions in the [Geocoding](#) section of this document to create a Google API key and add it to the Geocoding job.
- 9) Delete your existing Geocoding job, then open the ProfilesRNS_GeocodeJob.sql file. Modify this file for your configuration by replacing \$(YourProfilesDatabaseName) with your database name, and \$(YourProfilesServerName) with your database server name. Run ProfilesRNS_GeocodeJob.sql to create the geocoding job. Apply your chosen schedule to this job.

- 10) The Profiles RNS 3.0.0 code is intended to completely replace any previous version. To replace existing code copy the files other than the web.config from the Website\Binary\Profiles folder to your Profiles virtual directory. If you have modified your existing version of Profiles RNS, you will need to merge these changes with the source code in Website\SourceCode\Profiles\Profiles and recompile the code.
- 11) Google Maps will display with a "For development purposes only" watermark until an API key is added. Create an API key as described in the [Geocoding](#) section of this document, and edit your existing web.config file to add the following keys:
- a. ~~<add key="GoogleMapsKey" value="" />~~
- 12) Disable ORNG in the web.config by setting the Enabled value in the ORNG section to false.