**MPO IPT Installation Plan**

1. Stop all Feith Services and Web Servers
	1. Stop Apache Service
	2. Stop Tomcat Service
	3. Stop Feith Harrier
	4. Stop Feith Raptor
	5. Stop Feith Reports iQ
	6. Stop Feith Rules Engine
	7. Stop Feith UTR Engine
	8. Stop Feith Vortex
2. Backup Service Directories
	1. Back up EDSTOR
	2. Back up Harrier Directory
	3. Back up Raptor Directory
	4. Back up Reports iQ Directory
	5. Back up Rex Directory
	6. Back up UTR Directory
	7. Back up Vortex Directory
3. Backup Web Directories
	1. Backup Apache
	2. Back up Apache Tomcat
		1. Back up Tomcat Java Options in the Tomcat Manager
	3. Back up Auditor iQ
	4. Back up Central Rendering Engine
	5. Back up Dashboard iQ Server
	6. Back up Document Viewer
	7. Back up Feith Developer Server
	8. Back up Feith Drive
	9. Back up Forms iQ Server
	10. Back up Reports iQ Manager
	11. Back up RMA Workplace 9.2.1.1.1
	12. Back up RMA Workplace-Admin 9.2.1.1.1
	13. Back up WebFDD
4. Database
	1. Drop FDD Database
	2. Create new FDD Database with character set AL32UTF8
	3. Confirm Database character set is AL32UTF8
		1. If not, drop the empty database and recreate it
	4. Run the Feith Oracle Maker Script version 9.2.6
		1. Confirm Database Character Set is AL32UTF8
		2. Line 44: You will need to change the password for SYS to your SYS Password
		3. Line 176: You will need to change the password for User ‘fdd’ to something that respects your password complexity rules
		4. Lines 40 through 211 need to be run as SYS
		5. Line 213: connect to the database as User FDD using the password from step 3
		6. Line 218: change the fdd password to the password from step 3
		7. Line 218-268: Modify the storage paths to a location of your choosing
		8. Line 218-268: Modify the table size and growth size if needed
		9. Run lines 218-269 as user FDD
		10. Line 275: You will need to change the password for User ‘cold’ to something that respects your password complexity rules
		11. Line 281: You will need to change the password for User ‘rex’ to something that respects your password complexity rules
		12. Line 288: You will need to change the password for User ‘formsiq’ to something that respects your password complexity rules
		13. Line 294: You will need to change the password for User ‘raptor’ to something that respects your password complexity rules
		14. Line 300: You will need to change the password for User ‘harrier’ to something that respects your password complexity rules
		15. Line 306: You will need to change the password for User ‘utr1’ to something that respects your password complexity rules
		16. Line 312: You will need to change the password for User ‘feithsync1’ to something that respects your password complexity rules
		17. Line 318: You will need to change the password for User ‘reportsiq’ to something that respects your password complexity rules
		18. Line 327: You will need to change the password for User ‘autocat’ to something that respects your password complexity rules
		19. Line 333: You will need to change the password for User ‘dataservices to something that respects your password complexity rules
		20. Run Line 270 to end of the script as User ‘fdd’
5. Uninstall Services
	1. COLD
	2. FPX
	3. Harrier
	4. Raptor
	5. Reports iQ Service
	6. Rex
	7. Vortex
6. Services
	1. Run EDSTOR 1.51 as administrator and do a repair
	2. Run COLD 9.2.5.13 as administrator
		1. Compare new configuration file to the back up
	3. Run FPX 7.0 as administrator
		1. Compare new configuration file to the back up
	4. Run Harrier 9.2.3.1 as administrator
		1. Compare new configuration file to the back up
	5. Run Raptor 9.2.4.4 as administrator and do a repair
		1. Compare new configuration file to the back up
	6. Run Reports iQ Service 9.2.6.2.4 as administrator and do a repair
		1. Compare new configuration file to the back up
	7. Run Rex 8.1.5.0 as administrator
		1. Compare new configuration file to the back up
	8. Run Vortex 5.10 as administrator and do a repair
		1. Compare new configuration file to the back up
7. FTS Components
	1. Run Elasticsearch 1.7.4 installer as Administrator
		1. Refer to ES installation documentation
			1. Name the ElasticSearchCluster: **fdd**
			2. Expected Number of Nodes is: **1**
			3. **\***This\* ElasticSearch node is: **fdd1**
			4. **\***OTHER\* ES Hosts leave blank
			5. Number of Shards: **5**
			6. Number of replicas: **0**
			7. Choose name for your ES index for FDD: (connect string)
		2. Add server entry in FCP Servers Table for ES
	2. Run UTR 9.2.5.1 as Administrator
8. Webserver Components
	1. Uninstall the following components
		1. Java 7u45
		2. GS 9.06
		3. Central Rendering Engine 9.2.1.1.21
		4. Dashboard iQ Server 9.2.1.1.1
		5. Document Viewer 9.2.1.1.23
		6. Developer Server 9.2.1.1.43
		7. Forms iQ Server
		8. Reports iQ Manager 8.1.6.1
		9. WebFDD
	2. Install
		1. Java 7u71
		2. GS 9.18
		3. Run Auditor 9.2.6.1.2 as Administrator
			1. Compare configuration file to backup
		4. Run CentralRenderingEngine 9.2.4.1.33 as Administrator
			1. Compare configuration file to backup
			2. Need to double-check gs path, there was an issue with the installer
		5. Run Dashboard Server 9.2.4.1.11 as Administrator
			1. Compare configuration file to backup
		6. Run Document Viewer 9.2.4.2.1 as Administrator
			1. Compare configuration file to backup
		7. Run Feith Developer 9.2.4.1.48 as Administrator
			1. Compare configuration file to backup
				1. Confirm guest user is uncommented in configuration file and password is updated
			2. Modify tomcat/conf/catalina/dataservices.xml
				1. sessionCookiePath="/apps"
		8. Run Forms iQ Server 9.2.4.1 as Administrator
			1. Compare configuration file to backup
		9. Run Reports iQ Manager 9.2.6.2.4 as Administrator
			1. Compare configuration file to backup
		10. Run WebFCP 9.2.4.1.6 as Administrator
			1. Compare configuration file to backup
		11. Run WebFDD 9.2.1.10.5 as Administrator
			1. Compare configuration file to backup
9. Admin Tools
	1. Uninstall the following
		1. Dashboard Designer
		2. Feith Control Panel
		3. FDD Client
		4. Forms iQ Designer
		5. Feith Developer Client
		6. Print to FDD
		7. RMA iQ Administrator
		8. Workflow iQ Manager
	2. Install the following as administrator
		1. Dashboard iQ Designer 9.2.6.2b94
		2. FCP 9.2.2.11b438
		3. FDD 9.2.0.6
		4. Feith Developer Client 9.2.2.6
		5. Feith Forms iQ 9.2.4.1
		6. RMA iQ Administrator 9.2.1.3b60
		7. WFM 9.2.2.3
10. Import Auditor Components
	1. Import Auditor Report Templates using Reports iQ Manager
	2. Import Auditor Dashboards using Dashboard Designer
11. Import RMA Objects
	1. Confirm FDD is a workflow user using Feith Control Panel
	2. Import RMA Workflows
		1. Do not publish workflows
	3. Run RMAStoredProcedures.txt as FDD using SQL Developer
	4. Publish RMA Workflows
12. Import IPT Solution
	1. Import IP Tracker Groups
		1. In the FCP Groups module, import “IP Tracker Groups 216-09-21.xml”
		2. Add the following permissions to the public group using Feith Control Panel
			1. Index
			2. View
			3. Print
			4. Create Document Note
			5. Modifying Index Values
			6. Add Page
			7. Search File Cabinets
			8. Edit Supplemental Marking Assignment
			9. Edit Classification Attributes
	2. Import IP Tracker Look Up Tables
		1. In the FCP Lookup Tables module, import “Lookup lookup.xml”
	3. Import IP Tracker File Cabinets
		1. In the FCP File Cabinet module, import the following file cabinets
			1. FC IPT\_DOCS\_FC.xml
			2. FC IPT\_HELP\_DOCUMENTS\_FC.xml
			3. FC IPT\_REPORTS\_FC.xml
			4. FC IPT\_TEMPLATES\_FC.xml
			5. FC IPT\_USPTO\_STATEMENTS\_FC.xml
			6. FC IPT\_WORKFLOW\_ITEMS\_FC.xml
	4. Database
		1. Run the following Database Scripts using SQL Developer as FDD in the following order
			1. 1. IP Tracker Data Model OUTPUT 2016-09-15.sql
			2. 2. IP Tracker Data Model DATA 2016-09-15\_v3.sql
			3. 3. IP Tracker Data Model GRANTS 2016-09-22.sql
			4. 4. AdditionalGrants.sql
	5. Import IP Tracker Virtual File Cabinets
		1. Using the FCP File Cabinets module import the following VFCs
			1. FC Invention Disclosure Forms.xml
			2. FC IPT Check Register Workflow.xml
			3. FC IPT Document Uploads Workflow.xml
			4. FC IPT Global Help.xml
			5. FC IPT IDF Workflow.xml
			6. FC IPT Job Review Workflow.xml
			7. FC IPT Job Workflow.xml
			8. FC IPT Patent Workflow.xml
			9. FC IPT Register Lines Workflow.xml
			10. FC IPT Signatures Workflow.xml
			11. FC IPT Spend Plan Workflow.xml
			12. FC IPT Tasks Workflow.xml
			13. FC IPT\_SPEND\_PLAN\_ASSOCIATIONS.xml
	6. Import IP Tracker Workflows
		1. IPT Check Register Workflow
		2. IPT Document Upload Workflow
		3. IPT IDF Workflow
		4. IPT Job Application Sub-Flow
		5. IPT Job Maintenance Sub-Flow
		6. IPT Job Review Workflow
		7. IPT Job Workflow
		8. IPT Patent Workflow
		9. IPT Register Lines Workflow
		10. IPT Signatures Workflow
		11. IPT Spend Plan Workflow
		12. IPT Tasks Workflow2
	7. Import IP Tracker Report Templates
		1. Navigate to the Reports iQ Manger using a web browser
		2. Once logged in, click my templates
		3. Click the ‘New Report’ button in the upper right
		4. Click upload and select and select an rpt file from the explorer window
		5. Use the below tables to populate the data for the report templates
			1. IPT Pending Royalty Payments

|  |  |
| --- | --- |
| **File Name:** | IPT Pending Royalty Payments.rpt |
| **Template Name:** | IPT Pending Royalty Payments |
| **Access Group:** | public - all users |
| **Document Type:** | Standard Template |
| **Default Format:** | PDF (pdf) |
| **Status:** | Active |
| **Parameters :** | **Name** | **Description** | **Type** |
|   | end\_date | End Date for Report | Date |
|   | start\_date | Start Date for Report | Date |

* + - * 1. Once complete click ok
			1. IPT RPT IDF Document

|  |  |
| --- | --- |
| **File Name:** | ipt\_rpt\_idf\_document.rpt |
| **Template Name:** | ipt\_rpt\_idf\_document.rpt |
| **Access Group:** | fdd - Feith Systems |
| **Document Type:** | Standard Template |
| **Default Format:** | PDF (pdf) |
| **Status:** | Active |
| **Parameters :** | **Name** | **Description** | **Type** |
|   | idf\_id | IDF ID | Integer |

\*You **need** the .rpt for the template name for this report

* + - * 1. Once complete click ok
			1. IPT Spend Plan

|  |  |
| --- | --- |
| **File Name:** | ipt\_spend\_plan.rpt |
| **Template Name:** | ipt\_spend\_plan |
| **Access Group:** | public - all users |
| **Document Type:** | Standard Template |
| **Default Format:** | PDF (pdf) |
| **Status:** | Active |
| **Parameters :** | **Name** | **Description** | **Type** |
|   | splan\_id | Spend Plan ID | Integer |

* + - * 1. Once complete click ok
	1. Import IP Tracker Developer Objects
		1. Open Feith Developer
			1. Import the MultipleObjects\_2016\_10\_07-15\_38.fdo
	2. Import the IP Tracker Dashboards
		1. Open Feith Dashboard iQ Designer
			1. Import Dashboard Admin\_Dashboard.xml
				1. Confirm Permissions to screenshot included in migration in /8-Solution/9. Dashboards
		2. Open Feith Dashboard iQ Designer
			1. Dashboard OGC\_Dashboard.xml
				1. Confirm Permissions to screenshot included in migration in /8-Solution/9. Dashboards
		3. Open Feith Dashboard iQ Designer
			1. Dashboard TTP\_Dashboard.xml
				1. Confirm Permissions to screenshot included in migration in /8-Solution/9. Dashboards