


# **Sterling Warehouse Management System: Upgrade Guide**

Release 8.5

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# Preface

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This manual explains how to upgrade from Sterling Networked Warehouse Management System Release 1.0, or later to Sterling Warehouse Management System Release 8.5.

## Intended Audience

This manual provides assistance to system administrators, database administrators, and implementation personnel when upgrading from Sterling Networked Warehouse Management System Release 1.0 (or later) to Sterling Warehouse Management System Release 8.5.

## Structure

This document contains the following sections:

### **Chapter 1, "Performing a Migration Assessment"**

This chapter examines the differences between Sterling Networked Warehouse Management System Release 1.0 or later and Sterling Warehouse Management System Release 8.5.

### **Chapter 2, "Upgrading to Release 8.5 Along with Selling and Fulfillment Foundation 8.5"**

This chapter describes the sequence of procedures that you must follow to upgrade from Sterling Networked Warehouse Management System Release 1.0 or later to Sterling Warehouse Management System Release 8.5 along with the Selling and Fulfillment Foundation, Release 8.5.

### **Chapter 3, "Upgrading Sterling Warehouse Management System: Business Intelligence"**

This chapter discusses the changes in the Sterling Analytics module in Release 8.5.

## Documentation

For more information about the Sterling Warehouse Management System™ components, see the following manuals:

- *Sterling Warehouse Management System: Release Notes*
- *Sterling Warehouse Management System: Installation Guide*
- *Sterling Warehouse Management System: Overview*
- *Sterling Warehouse Management System: Implementation Guide*
- *Sterling Warehouse Management System: Reports Guide*
- *Sterling Warehouse Management System: Business Intelligence Guide*
- *Sterling Warehouse Management System: Printed Documents Guide*
- *Sterling Warehouse Management System: Billing Activity Reporting Engine Guide*
- *Sterling Warehouse Management System: Upgrade Guide*
- *Sterling Warehouse Management System: Voxware Integration Guide*
- *Sterling Warehouse Management System: Javadocs*

For more information about the Selling and Fulfillment Foundation components, see the following manuals:

- *Selling and Fulfillment Foundation: Release Notes*
- *Selling and Fulfillment Foundation: Installation Guide*
- *Selling and Fulfillment Foundation: Upgrade Guide*
- *Selling and Fulfillment Foundation: Configuration Deployment Tool Guide*
- *Selling and Fulfillment Foundation: Performance Management Guide*
- *Selling and Fulfillment Foundation: High Availability Guide*
- *Selling and Fulfillment Foundation: System Management Guide*
- *Selling and Fulfillment Foundation: Localization Guide*



- *Selling and Fulfillment Foundation: Customization Basics Guide*
- *Selling and Fulfillment Foundation: Customizing APIs Guide*
- *Selling and Fulfillment Foundation: Customizing Console JSP Interface for End User Guide*
- *Selling and Fulfillment Foundation: Customizing the RCP Interface Guide*
- *Selling and Fulfillment Foundation: Customizing User Interfaces for Mobile Devices Guide*
- *Selling and Fulfillment Foundation: Customizing Web UI Framework Guide*
- *Selling and Fulfillment Foundation: Customizing Swing Interface Guide*
- *Selling and Fulfillment Foundation: Extending the Condition Builder Guide*
- *Selling and Fulfillment Foundation: Extending the Database Guide*
- *Selling and Fulfillment Foundation: Extending Transactions Guide*
- *Selling and Fulfillment Foundation: Using Sterling RCP Extensibility Tool Guide*
- *Selling and Fulfillment Foundation: Integration Guide*
- *Selling and Fulfillment Foundation: Product Concepts Guide*
- *Sterling Warehouse Management™ System: Concepts Guide*
- *Selling and Fulfillment Foundation: Application Platform Configuration Guide*
- *Sterling Distributed Order Management™: Configuration Guide*
- *Sterling Supply Collaboration: Configuration Guide*
- *Sterling Global Inventory Visibility™: Configuration Guide*
- *Sterling Catalog Management™: Configuration Guide*
- *Sterling Logistics Management: Configuration Guide*
- *Sterling Reverse Logistics™: Configuration Guide*
- *Sterling Warehouse Management System: Configuration Guide*

- *Selling and Fulfillment Foundation: Application Platform User Guide*
- *Sterling Distributed Order Management: User Guide*
- *Sterling Supply Collaboration: User Guide*
- *Sterling Global Inventory Visibility: User Guide*
- *Sterling Logistics Management: User Guide*
- *Sterling Reverse Logistics: User Guide*
- *Sterling Warehouse Management System: User Guide*
- *Selling and Fulfillment Foundation: Mobile Application User Guide*
- *Selling and Fulfillment Foundation: Business Intelligence Guide*
- *Selling and Fulfillment Foundation: Javadocs*
- *Sterling Selling and Fulfillment Suite: Glossary*
- *Parcel Carrier: Adapter Guide*
- *Selling and Fulfillment Foundation: Multitenant Enterprise Guide*
- *Selling and Fulfillment Foundation: Password Policy Management Guide*
- *Selling and Fulfillment Foundation: Properties Guide*
- *Selling and Fulfillment Foundation: Item Concepts Guide*
- *Selling and Fulfillment Foundation: Pricing Concepts Guide*
- *Business Center: Item Administration Guide*
- *Business Center: Pricing Administration Guide*
- *Business Center: Customization Guide*
- *Business Center: Localization Guide*

## Conventions

The following conventions may be used in this manual:

Convention	Meaning
. . .	Ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
mono-spaced text	Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.
/ or \	Slashes and backslashes are file separators for the Windows, UNIX, and LINUX operating systems. The file separator for the Windows operating system is "\" and the file separator for UNIX and Linux systems is "/". The UNIX convention is used unless otherwise mentioned.
<YANTRA_HOME_OLD>	User-supplied location of the installation directory for previously installed releases. This is only applicable for Releases 7.7, 7.9, and 7.11.
<YFS_HOME_OLD>	This is the <YANTRA_HOME>/Runtime directory of previously installed releases. This is only applicable for Releases 7.7, 7.9, and 7.11.
<INSTALL_DIR>	User-supplied location of the Selling and Fulfillment Foundation installation directory. This is applicable for Release 8.0.
<ANT_HOME>	This is the location of the ANT installation.

**Note:** The Selling and Fulfillment Foundation documentation set uses the following conventions in the context of the product name:

- Yantra is used for Release 7.7 and earlier.
- Sterling Supply Chain Applications is used for Releases 7.9 and 7.11.
- Sterling Multi-Channel Fulfillment Solution is used for Releases 8.0 and 8.2.
- Selling and Fulfillment Foundation for Release 8.5.



# Performing a Migration Assessment

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This chapter explains the changes between each earlier release of the Sterling Networked Warehouse Management System and Sterling Warehouse Management System. Read this chapter to assess the changes required to upgrade to Sterling Warehouse Management System, Release 8.5, and then perform the steps described in [Chapter 2, "Upgrading to Release 8.5 Along with Selling and Fulfillment Foundation 8.5"](#).

[Table 1–1](#) describes the upgrade paths available from Sterling Warehouse Management System Release 1.0 to Sterling Warehouse Management System, Release 8.5 and the supported Selling and Fulfillment Foundation, Release 8.5.

**Note:** Sterling Warehouse Management System 8.5 is also supported on Selling and Fulfillment Foundation, Release 9.0.

**Table 1–1 Upgrade Paths to Release 8.5**

From		To		Path Followed	
Sterling Supply Chain Applications Version	Sterling nWMS/Sterling Warehouse Management System Version	Selling and Fulfillment Foundation Version	Sterling Warehouse Management System Version	Sterling Supply Chain Applications/Selling and Fulfillment Foundation	Sterling nWMS/Sterling Warehouse Management System
7.3	1.0	8.5	8.5	7.3 → 7.5 → 7.5 SP1 → 7.7 → 7.9 → 7.11 → 8.0 → 8.2 → 8.5	1.0 → 2.0 → 2.5 → 2.5.1 → 7.3 → 7.5 → 8.0 → 8.5
7.5	2.0	8.5	8.5	7.5 → 7.5 SP1 → 7.7 → 7.9 → 7.11 → 8.0 → 8.2 → 8.5	2.0 → 2.5 → 2.5.1 → 7.3 → 7.5 → 8.0 → 8.5
7.5 SP1	2.5	8.5	8.5	7.5 SP1 → 7.7 → 7.9 → 7.11 → 8.0 → 8.2 → 8.5	2.5 → 2.5.1 → 7.3 → 7.5 → 8.0 → 8.5
7.7	2.5.1	8.5	8.5	7.7 → 7.9 → 7.11 → 8.0 → 8.2 → 8.5	2.5.1 → 7.3 → 7.5 → 8.0 → 8.5
7.9	7.3	8.5	8.5	7.9 → 7.11 → 8.0 → 8.2 → 8.5	7.3 → 7.5 → 8.0 → 8.5
7.11	7.3 HF7	8.5	8.5	7.11 → 8.0 → 8.2 → 8.5	7.3 → 7.5 → 8.0 → 8.5
7.11	7.5	8.5	8.5	7.11 → 8.0 → 8.2 → 8.5	7.5 → 8.0 → 8.5
8.0	8.0	8.5	8.5	8.0 → 8.2 → 8.5	8.0 → 8.5

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**Note:** While upgrading to Release 8.5 along with Selling and Fulfillment Foundation 9.0, there is an additional upgrade path from 8.5 to 9.0 for Selling and Fulfillment Foundation.

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## 1.1 System Requirements

The system requirements for upgrading to Sterling Warehouse Management System, Release 8.5 are the same as that for upgrading to the Selling and Fulfillment Foundation, Release 8.5.

For more information about the system requirements, see the *Selling and Fulfillment Foundation: Upgrade Guide*.

## 1.2 Important Behavior Changes

The following sections describe the database updates performed when upgrading to Sterling Warehouse Management System, 8.5.

### 1.2.1 Database Update During Migration

During the upgrade process, several tables, along with the data in these tables, may be changed. This section describes the steps necessary to find the tables that have incurred changes.

The following types of database updates can be performed:

- [Factory Setup Migration](#)
- [Custom Data Migration](#)

#### 1.2.1.1 Factory Setup Migration

For a list of tables with factory setup data being changed, please review the following directories:

- For tables with additional factory setup data as part of Sterling Warehouse Management System Add-In:  
<INSTALL\_DIR>/WMS/Migration/WMS\_Add-in/8.0/database/Fact  
orySetup/XMLS/ynw/added

- For tables with changed factory setup data as part of Sterling Warehouse Management System Add-In:  
<INSTALL\_DIR>/WMS/Migration/WMS\_Add-in/8.0/database/FactorySetup/XMLS/ynw/changed
- For tables with deleted factory setup data as part of Sterling Warehouse Management System Add-In:  
<INSTALL\_DIR>/WMS/Migration/WMS\_Add-in/8.0/database/FactorySetup/XMLS/ynw/deleted
- For tables with additional factory setup data as part of Sterling Warehouse Management System:  
<INSTALL\_DIR>/WMS/Migration/WMS/8.0/database/FactorySetup/ynw/added
- For tables with changed factory setup data as part of Sterling Warehouse Management System:  
<INSTALL\_DIR>/WMS/Migration/WMS/8.0/database/FactorySetup/ynw/changed
- For tables with deleted factory setup data as part of Sterling Warehouse Management System:  
<INSTALL\_DIR>/WMS/Migration/WMS/8.0/database/FactorySetup/ynw/deleted

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**Note:** The name of each file in these directories corresponds to the name of the table that is being updated, for example, the YNW\_YFS\_EVENT.xml file corresponds to the YFS\_EVENT table.

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### 1.2.1.2 Custom Data Migration

For a list of tables changed during the Custom Data Migration process using SQL updates, refer to the Important Behavior Changes section of the release that is relevant to your upgrade. In the Important Behavior Changes section, you can find the following information:

- The changes that have taken place during the migration
- The locations of the SQL scripts that have been run or the tables that have been affected



## 1.3 Sterling Warehouse Management System User Interface

Additional Application Consoles user interface features have been introduced between Sterling Warehouse Management System, Release 1.0, and Sterling Warehouse Management System, Release 8.5. However, they are not mentioned in this document because they do not impact migration assessment in any way. For additional information regarding the new features in the Sterling Warehouse Management System Application Consoles, see the *Sterling Warehouse Management System: Release Notes*.

## 1.4 Migrating Alter Scripts

The alter scripts for the Sterling Warehouse Management System entities are generated and executed when upgrading from Sterling Supply Chain Applications, Release 7.3 (or later), to Selling and Fulfillment Foundation, Release 8.5.

## 1.5 Migrating Estimates

Only the factory defaults migration is involved when upgrading to Release 8.5. Therefore, the upgrade tasks complete in minimum time.

## 1.6 Upgrading Custom Components

Custom components are upgraded when upgrading from the Sterling Supply Chain Applications, Release 7.3 (or later) to Selling and Fulfillment Foundation, Release 8.5. Any extensions made by you are copied to the `<INSTALL_DIR>/extensions` directory in the Selling and Fulfillment Foundation, Release 8.5.



# Upgrading to Release 8.5 Along with Selling and Fulfillment Foundation 8.5

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This chapter describes the sequence of procedures that you must follow to upgrade from Sterling Networked Warehouse Management System, Release 1.0 (or later) to Sterling Warehouse Management System, Release 8.5, along with the Selling and Fulfillment Foundation, Release 8.5.

## 2.1 Installing Selling and Fulfillment Foundation, Release 8.5

Before proceeding with the upgrade, ensure that you have installed Selling and Fulfillment Foundation, Release 8.5.

For installation instructions, see the *Selling and Fulfillment Foundation: Installation Guide*.

## 2.2 Installing Sterling Warehouse Management System, Release 8.5

Before proceeding with this upgrade, ensure that you have performed the following tasks:

- Installed Sterling Warehouse Management System 8.5.
- Rebuilt the EAR file with database extensions.

For installation instructions, see the *Sterling Warehouse Management System: Installation Guide*. Before installing the Sterling Warehouse Management System, perform the following tasks:

1. Before upgrading from Release 8.0 to Release 8.5, compare the entity extension files in `<INSTALL_DIR_OLD>/repository/entity/extensions` with the entity extension files in `<INSTALL_DIR_OLD>/extensions/global/entities`. If there are extension files with matching file names, consolidate these files into one file in `<INSTALL_DIR_OLD>/repository/entity/extensions`.
2. For upgrade, Apache Ant is being shipped inside the migration kit directory. Set the `ANT_HOME` environment variable to `<INSTALL_DIR>/Migration/apache-ant-1.7.1`
3. Go to `<INSTALL_DIR>/Migration` directory and execute the following command `chmod -R 755 apache-ant-1.7.1`
4. Ensure that the `<JAVA_HOME>` environment variable points to the folder where the JDK is installed.

## 2.3 Upgrading to the Selling and Fulfillment Foundation, Release 8.5

Before upgrading to Sterling Warehouse Management System, Release 8.5, ensure that you have upgraded to the Selling and Fulfillment Foundation, Release 8.5. The Selling and Fulfillment Foundation, Release 8.5 upgrade performs the following actions for the Sterling Warehouse Management System upgrade tasks:

- Alters the schema
- Copies the current customizations

For more information about upgrading to the Selling and Fulfillment Foundation, Release 8.5, see the *Selling and Fulfillment Foundation: Upgrade Guide*.

## 2.4 Upgrading to Sterling Warehouse Management System, Release 8.5

After you have upgraded to the Selling and Fulfillment Foundation, Release 8.5, you can upgrade the factory defaults for Sterling Warehouse Management System, Release 8.5 Add-in and Sterling Warehouse Management System, Release 8.5.

Upgrading to Sterling Warehouse Management System is a two-step process:

- [Upgrading the Sterling Warehouse Management System Add-In](#)
- [Upgrading Sterling Warehouse Management System](#)

## 2.4.1 Upgrading the Sterling Warehouse Management System Add-In

To upgrade the factory defaults for the Sterling Warehouse Management System 8.5 Add-in, run the following commands from the `<INSTALL_DIR>/WMS/Migration/WMS_Add-in/8.0` folder:

**When migrating from Releases 2.5 or 8.0 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-Dtarget=upgrade-transaction-tables migrate -l <logfile>
```

**When migrating from Releases 2.5.1, 7.3 or 7.5 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>
-Dtarget=upgrade-transaction-tables migrate -l <logfile>
```

To update the SI\_VERSION table for the Sterling Warehouse Management System 8.5 Add-in, run the following commands from the `<INSTALL_DIR>/WMS/Migration/WMS_Add-in/8.0` folder:

**When migrating from Releases 2.5 or 8.0 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-Dtarget=update-application-version migrate -l <logfile>
```

**When migrating from Releases 2.5.1, 7.3 or 7.5 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>
-Dtarget=update-application-version migrate -l <logfile>
```

These commands perform the following tasks:

1. Execute the changes in the factory setup XML.
2. Execute the following tasks:
  - apply-fc-setup
  - pre-transaction-migration
  - migrate-transaction-data
  - post-transaction-migration
  - update-application-version
3. After the tasks are completed, search for all the \*.restart files under the following directories:
  - 8.0/database/FactorySetup/XMLS/ynw
  - 7.5/database/FactorySetup/XMLS/ynw
  - 7.3/database/FactorySetup/XMLS/ynw
  - 2.5.1/database/FactorySetup/XMLS/ynw
  - 2.5/database/FactorySetup/XMLS/ynw
4. Ensure that Completed="Y" for all the tasks.

If Completed="Y", it means that the upgrade tasks are successfully completed. If Completed="N" for any task, contact the Selling and Fulfillment Foundation Technical Support with all the restart files and log files. Do not proceed with the upgrade.
5. Creates the following \*.done files:

In the 8.0/status folder:

  - transaction\_ant\_migration.xml.done
  - transaction\_ant\_postmigration.xml.done
  - transaction\_ant\_premigration.xml.done
  - transaction\_ant\_upgradepreparation.xml.done
  - transaction\_ant\_validation.xml.done
  - transaction\_ant\_ynwapplyfcsetup.xml.done
  - transaction\_ant\_applicationversion.xml.done

If you are upgrading from previous release to 8.5, the same \*.done files will be created in the status folder of each release upto 8.0.

For example, if you are upgrading from 2.5, the \*.done files will be available in the status folder of Releases 2.5, 2.5.1, 7.3, 7.5 and 8.0.

To clean up all the \*.restart and \*.done files before restarting the upgrade, execute the following commands:

**When migrating from Releases 2.5 or 8.0 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-Dtarget=clean-up-for-rerun migrate
```

**When migrating from Releases 2.5.1, 7.3 or 7.5 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>
-Dtarget=clean-up-for-rerun migrate
```

## 2.4.2 Upgrading Sterling Warehouse Management System

To upgrade the factory defaults for Sterling Warehouse Management System, Release 8.5, run the following commands from the <INSTALL\_DIR>/WMS/Migration/WMS/8.0 folder:

**When migrating from Releases 1.0, 2.0, 2.5 or 8.0 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-Dtarget=upgrade-transaction-tables migrate -l <logfile>
```

**When migrating from Releases 2.5.1, 7.3, 7.5 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>
-Dtarget=upgrade-transaction-tables migrate -l <logfile>
```

To update the SI\_VERSION table for the Sterling Warehouse Management System 8.5, run the following commands from the <INSTALL\_DIR>/WMS/Migration/WMS/8.0 folder:

**When migrating from Releases 1.0, 2.0, 2.5 or 8.0 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml  
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>  
-Dtarget=update-application-version migrate -l <logfile>
```

**When migrating from Releases 2.5.1, 7.3 or 7.5 to 8.5, run:**

```
{ANT_HOME}/bin/ant -f ynwmigration.xml  
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>  
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>  
-Dtarget=update-application-version migrate -l <logfile>
```

These commands perform the following tasks:

1. Execute the changes in the factory setup XMLs.

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---

**Note:** The factory setup upgrade is not executed in the activator mode. Therefore, the event handlers and pipeline conditions are not overridden.

---

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2. Execute the following tasks:

- apply-fc-setup
- pre-transaction-migration
- migrate-transaction-data
- post-transaction-migration
- update-application-version

3. After the tasks are completed, search for all the \*.restart files under the following directories:

- 8.0/database/FactorySetup/XMLS/ynw
- 7.5/database/FactorySetup/XMLS/ynw
- 7.3/database/FactorySetup/ynw
- 2.5.1/database/FactorySetup/ynw



- 2.5/database/FactorySetup/ynw
- 2.0/database/FactorySetup/XMLS/ynw
- 1.0/database/FactorySetup/XMLS/ynw

4. Ensure that Completed="Y" for all the tasks.

If Completed="Y", the upgrade tasks are successfully completed. If Completed="N" for any task, contact Selling and Fulfillment Foundation Technical Support with all the restart files and log files. Do not proceed with the upgrade.

5. Create the following \*.done files:

In the 8.0/status folder:

- transaction\_ant\_migration.xml.done
- transaction\_ant\_postmigration.xml.done
- transaction\_ant\_premigration.xml.done
- transaction\_ant\_upgradepreparation.xml.done
- transaction\_ant\_validation.xml.done
- transaction\_ant\_ynwapplyfcsetup.xml.done
- transaction\_ant\_applicationversion.xml.done

If you are upgrading from previous release to 8.5, the same \*.done files will be created in the status folder of each release upto 8.0.

For example, if you are upgrading from 2.5, the \*.done files will be available in the status folder of Releases 2.5, 2.5.1, 7.3, 7.5 and 8.0.

To clean up all the \*.restart and \*.done files before restarting the upgrade, run the following commands:

**When migrating from Releases 1.0, 2.0, 2.5 or 8.0 to 8.5, run:**

```

${ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
-Dtarget=clean-up-for-rerun migrate
    
```

**When migrating from Releases 2.5.1, 7.3 or 7.5 to 8.5, run:**

```

${ANT_HOME}/bin/ant -f ynwmigration.xml
-Druntime.old=<YFS_HOME_OLD> -Druntime=<INSTALL_DIR>
    
```

```
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>  
-Dtarget=clean-up-for-rerun migrate
```

### 2.4.3 Running the Upgrade Using NFS Mounting

Although it is recommended that you run the upgrade from the database server instead of the application server to avoid significant network overhead, you have the option of using NFS mounting. By using NFS mounting you can avoid installing the complete Selling and Fulfillment Foundation suite on the database server.

To use NFS mounting:

1. Create a user on the database server with the same UID and GID as the user who installed the Selling and Fulfillment Foundation on your application server. This user should preferably have the same user name. For example, if the UNIX user used for installing and running Sterling Warehouse Management System, Release 8.5 is "Sterlite" with a UID of 5001 and GID of 101, the user that you create on the database server must have a UID of 5001 and GID of 101, and should preferably be named "Sterlite".
2. Share the <INSTALL\_DIR> directory on the application server.
3. Mount the <INSTALL\_DIR> with the same path on the database server. For example, if your <INSTALL\_DIR> is /apps/yantra on the application server, mount it as /apps/yantra on the database server.
4. Share the <JAVA\_HOME> directory that you are using for the Selling and Fulfillment Foundation from the application server. Because you might have multiple Java versions installed on the application server for various reasons, exercise caution and share the same <JAVA\_HOME> that you are using for the Selling and Fulfillment Foundation.
5. Mount the <JAVA\_HOME> directory with the same path on the database server, for example, if your <JAVA\_HOME> was /apps/java on the application server, mount it as /apps/java on the database server.

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**Note:** NFS mount only the <INSTALL\_DIR> and <JAVA\_HOME> directories. Do not NFS mount other components, especially the database files. NFS mounting is not a good option for write-intensive applications it drastically impacts database performance.

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6. Log in as the Selling and Fulfillment Foundation Administrator on the database server.



# Upgrading Sterling Warehouse Management System: Business Intelligence

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This chapter explains how to upgrade to Sterling Warehouse Management System: Business Intelligence reports 8.5 from the previous versions.

## 3.1 Prerequisites

You should have completed the upgrade to Sterling Warehouse Management System, Release 8.5.

## 3.2 General Changes

The following changes have been made for the Sterling Warehouse Management System, Release 8.5:

- The Sterling Warehouse Management System: Business Intelligence 8.5 is certified on Cognos 8 Business Intelligence 8.4.
- All reports, packages, models, and deployments have been migrated to Cognos 8 BI 8.4.
- Reports extended by you should be upgraded to Cognos 8 BI 8.4.
- In Release 8.5, the Sterling Warehouse Management System is hosted either on single schema or on multischema. However, on upgrading, the Sterling Warehouse Management System will be hosted on a single schema.

### 3.2.1 Data Sources

For earlier releases, as the Sterling Warehouse Management System was hosted on a single database schema, the database views and tables in the Sterling Warehouse Management System: Business Intelligence were modelled under a single data source. Also, the data source was named either as `yantra` (Yantra 7.x) or as `wms` (Sterling Warehouse Management System, 8.0).

As part of Sterling Warehouse Management System: Business Intelligence 8.5 release, the database views and tables are remodelled under the following four data sources that can be further parameterized:

- `wms-meta`
- `wms-configuration-default`
- `wms-master-default`
- `wms-transaction-default`

On upgrading, as the Sterling Warehouse Management System is hosted on a single database schema, all the four data sources point to same database schema. For more information about data sources, refer to the *Sterling Warehouse Management System: Business Intelligence Guide*.

## 3.3 Upgrading to Sterling Warehouse Management System: Business Intelligence 8.5

To upgrade to Sterling Warehouse Management System: Business Intelligence 8.5, you should choose the appropriate scenario from the list provided here.

- [If you have Extended the Model and Reports](#)
- [If you have Extended the Reports and not the Model](#)
- [If you have not Extended the Model and Reports](#)

### 3.3.1 If you have Extended the Model and Reports

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**Note:** In Sterling Warehouse Management System: Business Intelligence 8.5, changes have been made to the Analytics Data Model in order to support Multischema onboarding. Therefore, if you have extended the Analytics Data Model in the earlier versions, it may not be compatible with the current version of the Analytics Data Model. Thus, after upgrading, you must redo the extension of the Analytics Data Model.

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#### Steps to Upgrade

1. Upgrade to Cognos 8 Business Intelligence 8.4.  
For more information about upgrading to Cognos 8 Business Intelligence 8.4 from Cognos 7x, refer the *Cognos 8 Business Intelligence Installation and Configuration Guide*.
2. Take a backup of the existing packages, and delete them. When you delete the existing packages, you lose the extension changes, and must redo them after upgrade.
3. Install Sterling Warehouse Management System: Business Intelligence 8.5. Ensure that the new installation directory is different from the old Analytics installation directory.  
The new installation directory will be `YNW_ANALYTICS_HOME`. Refer to the old Analytics Installation directory as `OLD_YNW_ANALYTICS_HOME`.
4. Deploy Sterling Warehouse Management System: Business Intelligence 8.5. After deploying, you will see the WMS-Analytics package in the Cognos Content Manager.
5. Redo the Analytics Data Model extension. For more information about extending the Analytics Data Model, refer to the *Sterling Warehouse Management System: Business Intelligence Guide*.

### 3.3.2 If you have Extended the Reports and not the Model

If you are upgrading from Sterling Warehouse Management System, Release 7.x, refer to [Section 3.3.2.1, "Upgrading from Sterling Warehouse Management System, Release 7.x to Sterling Warehouse](#)

Management System, Release 8.5.", else refer to Section 3.3.2.2, "Upgrading from Sterling Warehouse Management System, Release 8.0 to Sterling Warehouse Management System, Release 8.5."

### 3.3.2.1 Upgrading from Sterling Warehouse Management System, Release 7.x to Sterling Warehouse Management System, Release 8.5.

#### Case 1

If you have extended only the reports (not the model) without following the procedure explained in the *Sterling Warehouse Management System: Business Intelligence Guide*, perform the steps provided here in order to upgrade.

#### Steps to Upgrade

1. Upgrade to Cognos 8 Business Intelligence 8.4.

For more information about upgrading to Cognos 8 Business Intelligence 8.4, refer to the *Cognos 8 Business Intelligence Installation and Configuration Guide*.

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**Note:** The new analytics installation directory will be `YNW_ANALYTICS_HOME`. Refer to the old Analytics Installation directory as `OLD_YNW_ANALYTICS_HOME`. Ensure that the `YNW_ANALYTICS_HOME` directory points to the new Analytics installation, and the `OLD_YNW_ANALYTICS_HOME` directory points to the Older Analytics installation.

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2. Extended reports should be upgraded to Cognos 8 BI 8.4 using Report Studio. Ensure that all the extended reports are locally saved in the `OLD_YNW_ANALYTICS_HOME/reports` directory.
3. Install Sterling Warehouse Management System: Business Intelligence 8.5. For information about installing the Sterling Analytics 8.5, refer to the *Sterling Warehouse Management System: Business Intelligence Guide*.



4. Deploy the Sterling Warehouse Management System Analytics 8.5. At the end of this exercise there will be two packages in the Content Manager:
  - nWMS-Analytics (existing)
  - WMS-Analytics (new)

### Upgrading the Extended Reports

1. Create a new folder `reports_extn` in `YNW_ANALYTICS_HOME`. Copy all the extended reports from the `OLD_YNW_ANALYTICS_HOME/reports` folder to this new folder. Only extended reports should be copied.
2. Open Report Studio for the WMS-Analytics package. Open each one of these extended reports from the `reports_extn` folder and save them under WMS-Analytics package and a new folder `wms_extn`. Also, locally save these reports under the `reports_extn` folder inside `YNW_ANALYTICS_HOME`.

Change the package name of these reports from nWMS-Analytics to WMS-Analytics. This can be done by navigating to Report Studio > File > Report Packages and selecting WMS-Analytics.

Note that performing this step changes the package name from nWMS-Analytics to WMS-Analytics in the report XMLs.

3. Ensure that all the extended reports are saved in the new WMS-Analytics package. (You can now delete the nWMS-Analytics package from Cognos Content Manager.) Now Cognos Content Manager will have one package with two folders:
  - WMS-Analytics/WMS, containing the out-of-the-box reports
  - WMS-Analytics/WMS\_extn, containing the extended reports

### Case 2

If you have extended only the reports (not the model) as per the procedure explained in the *Sterling Warehouse Management System: Business Intelligence Guide*, perform the steps described here.

### Steps to Upgrade

1. Upgrade to Cognos 8 Business Intelligence 8.4.

2. For more information about upgrading to Cognos 8 Business Intelligence 8.4, refer to the *Cognos 8 Business Intelligence Installation and Configuration Guide*.

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**Note:** The new analytics installation directory will be `YNW_ANALYTICS_HOME`. Refer to the old Analytics Installation directory as `OLD_YNW_ANALYTICS_HOME`. Ensure that the `YNW_ANALYTICS_HOME` directory points to the new Analytics installation, and the `OLD_YNW_ANALYTICS_HOME` directory points to the Older Analytics installation.

---

---

3. Extended reports should be upgraded to Cognos 8 BI 8.4 using Report Studio. Ensure that all the extended reports are locally saved in the `OLD_YNW_ANALYTICS_HOME/reports_ext` directory.
4. Install Sterling Warehouse Management System Analytics 8.5. For information about installing the Sterling Analytics 8.5, refer to the *Sterling Warehouse Management System: Business Intelligence Guide*.
5. Deploy the Sterling Warehouse Management System Analytics 8.5. At the end of this exercise there will be two packages in the Content Manager:
  - nWMS-Analytics (existing) - this package contains the nWMS-Analytics/WMS and the nWMS-Analytics/WMS\_extn folders.
  - WMS-Analytics (new)

### Upgrading the Extended Reports

1. Copy the `reports_extn` folder from `OLD_YNW_ANALYTICS_HOME` to `YNW_ANALYTICS_HOME`.
2. Open Report Studio for the WMS-Analytics package. Open each one of these extended reports from the `YNW_ANALYTICS_HOME/reports_extn` folder and save them under WMS-Analytics package and a new folder `WMS_extn`. Also, locally save these reports under the `reports_extn` folder inside `YNW_ANALYTICS_HOME`.

Change the package name of these reports from nWMS-Analytics to WMS-Analytics. This can be done by navigating to Report Studio > File > Report Packages and selecting WMS-Analytics.

Note that performing this step changes the package name from nWMS-Analytics to WMS-Analytics in the report XMLs.

3. Ensure that all the extended reports are saved in the new WMS-Analytics package. (You can now delete the nWMS-Analytics package from Cognos Content Manager.) Now Cognos Content Manager will have one package with two folders:
  - WMS-Analytics/WMS, containing the out-of-the-box reports
  - WMS-Analytics/WMS\_extn, containing the extended reports

### **3.3.2.2 Upgrading from Sterling Warehouse Management System, Release 8.0 to Sterling Warehouse Management System, Release 8.5.**

#### **Steps to Upgrade**

1. Upgrade to Cognos 8 Business Intelligence 8.4.

For more information about upgrading to Cognos 8 Business Intelligence 8.4, refer to the *Cognos 8 Business Intelligence Installation and Configuration Guide*.

**Notes:**

- It is assumed that the reports are extended as per the procedure explained in the *Sterling Warehouse Management System: Business Intelligence Guide*.
- The new installation directory will be `YNW_ANALYTICS_HOME`. Refer to the old Analytics Installation directory as `OLD_YNW_ANALYTICS_HOME`. Ensure that the `YNW_ANALYTICS_HOME` directory points to the new Analytics installation, and the `OLD_YNW_ANALYTICS_HOME` directory points to the Older Analytics installation.

2. Extended reports should be upgraded to Cognos 8 BI 8.4 using Report Studio. Ensure that all the extended reports are locally saved in the `OLD_YNW_ANALYTICS_HOME/reports_ext` directory.
3. Install Sterling Warehouse Management System Analytics 8.5. For more information about installing the Sterling Analytics 8.5, refer to the *Sterling Warehouse Management System: Business Intelligence Guide*.
4. Deploy the Sterling Warehouse Management System Analytics 8.5. At the end of this exercise the WMS-Analytics package will contain the latest changes in the Content Manager.
5. Copy `reports_extn` folder from `OLD_YNW_ANALYTICS_HOME` to `YNW_ANALYTICS_HOME`. At the end of this exercise, the package structure of WMS-Analytics will be as follows:
  - `WMS-Analytics/WMS`, containing the latest out-of-the-box reports
  - `WMS-Analytics/WMS_extn`, containing the extended reports

### 3.3.3 If you have not Extended the Model and Reports

If you are upgrading from Sterling Warehouse Management System, Release 7.x, refer to [Section 3.3.3.1, "Upgrading from Sterling Warehouse Management System, Release 7.x to Sterling Warehouse Management System, Release 8.5."](#), else refer to [Section 3.3.3.2, "Upgrading from Sterling Warehouse Management System, Release 8.0 to Sterling Warehouse Management System, Release 8.5."](#)

### 3.3.3.1 Upgrading from Sterling Warehouse Management System, Release 7.x to Sterling Warehouse Management System, Release 8.5.

If you have not extended the model and reports, Cognos Content Manager will have only the nWMS-Analytics package.

#### Steps to Upgrade:

1. Upgrade to Cognos 8 Business Intelligence 8.4.

For more information about upgrading to Cognos 8 Business Intelligence 8.4 from Cognos 7x, refer to the *Cognos 8 Business Intelligence Installation and Configuration Guide*.

2. Install Sterling Warehouse Management System Analytics 8.5. For information about installing the Sterling Analytics 8.5, refer to the *Sterling Warehouse Management System: Business Intelligence Guide*.
3. After installation, the new installation directory will be YNW\_ANALYTICS\_HOME.
4. Deploy the Sterling Warehouse Management System Analytics 8.5. At the end of this exercise there will be two packages in the Content Manager:
  - nWMS-Analytics (existing)
  - WMS-Analytics (new)
5. Delete the nWMS-Analytics package.

### 3.3.3.2 Upgrading from Sterling Warehouse Management System, Release 8.0 to Sterling Warehouse Management System, Release 8.5.

If you have not extended the model and reports, Cognos Content Manager will have only the WMS-Analytics package.

#### Steps to Upgrade

1. Upgrade to Cognos 8 Business Intelligence 8.4.

For more information about upgrading to Cognos 8 Business Intelligence 8.4 from Cognos 8 Business Intelligence 8.4, refer to the *Cognos 8 Business Intelligence Installation and Configuration Guide*.

2. Install Sterling Warehouse Management System Analytics 8.5. For information about installing the Sterling Analytics 8.5, refer to the *Sterling Warehouse Management System: Business Intelligence Guide*.
3. After installation, the new installation directory will be YNW\_ANALYTICS\_HOME.
4. Deploy the Sterling Warehouse Management System Analytics 8.5. At the end of this exercise, the WMS-Analytics package will contain the latest changes in the Content Manager.

### 3.4 Postmigration Activities

This section explains the postmigration activities that must be performed to support Sterling Warehouse Management System: Business Intelligence 8.5 on Selling and Fulfillment Foundation 9.0 after upgrading from Selling and Fulfillment Foundation 8.5.

If you upgraded in single-schema mode, no change is required in the existing Cognos setup.

If you upgraded in multischema mode and upgraded all colonies in your multischema environment, the Sterling Warehouse Management System: Business Intelligence 8.5 installation running on Selling and Fulfillment Foundation 8.5 will work well, and you do not have to make any additional changes.

If you upgraded in multischema mode and upgraded one or more colonies in your multischema environment without migrating all colonies, you must install a new instance of Cognos 8 Business Intelligence 8.4. This is because each version of Selling and Fulfillment Foundation requires a separate instance of Cognos 8 Business Intelligence 8.4. For more information about Cognos 8 Business Intelligence 8.4 installation, refer to the Cognos 8 Business Intelligence Installation and Configuration Guide.

After installing the new Cognos server, deploy Business Intelligence from Sterling Warehouse Management System Release 8.5, HF3 or later. For more information about deploying Sterling Warehouse Management: Business Intelligence refer to the Sterling Warehouse Management System: Business Intelligence Guide.



