Information Builders

iWay

Omni-HealthData™ Upgrade Guide

Version 3.1

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Preface

This documentation provides prerequisites and instructions to upgrade Omni-HealthData™ on Windows and Linux platforms.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Upgrading Omni Server and Omni-HealthData Governance Console on Windows Platforms	Describes how to upgrade the primary components of Omni-HealthData on Windows platforms.
2	Upgrading Omni Server and Omni-HealthData Governance Console on Linux Platforms	Describes how to upgrade the primary components of Omni-HealthData on Linux platforms.

Documentation Conventions

The following table lists and describes the documentation conventions that are used in this manual.

Convention	Description

`THIS TYPEFACE`
or
`this typeface`
	Denotes syntax that you must type exactly as shown.

this typeface	Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.
underscore	Indicates a default setting.
Key + Key	Indicates keys that you must press simultaneously.
{}	Indicates two or three choices. Type one of them, not the braces.
|	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.

Convention	Description
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
. . .	Indicates that there are (or could be) intervening or additional commands.

Related Publications

Visit our Technical Documentation Library at *http://documentation.informationbuilders.com*. You can also contact the Publications Order Department at (800) 969-4636.

Customer Support

Do you have questions about this product?

Join the Focal Point community. Focal Point is our online developer center and more than a message board. It is an interactive network of more than 3,000 developers from almost every profession and industry, collaborating on solutions and sharing every tips and techniques. Access Focal Point at *http://forums.informationbuilders.com/eve/forums*.

You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our website, *http://www.informationbuilders.com*. It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of *www.informationbuilders.com* also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

Call Information Builders Customer Support Services (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 A.M. and 8:00 P.M. EST to address all your questions. Information Builders consultants can also give you general guidance regarding product capabilities. Be prepared to provide your six-digit site code (*xxxx.xx*) when you call.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

Help Us to Serve You Better

To help our consultants answer your questions effectively, be prepared to provide specifications and sample files and to answer questions about errors and problems.

The following table lists the environment information that our consultants require.

Platform	
Operating System	
OS Version	
JVM Vendor	
JVM Version	

The following table lists additional questions to help us serve you better.

Request/Question	Error/Problem Details or Information
Did the problem arise through a service or event?	
Provide usage scenarios or summarize the application that produces the problem.	
When did the problem start?	
Can you reproduce this problem consistently?	
Describe the problem.	
Describe the steps to reproduce the problem.	
Specify the error messages.	

Request/Question	Error/Problem Details or Information
Any change in the application environment: software configuration, EIS/database configuration, application, and so forth?	
Under what circumstance does the problem *not* occur?	

The following is a list of error and problem files that might be applicable.

- ❑ Input documents (XML instance, XML schema, non-XML documents)
- ❑ Transformation files
- ❑ Error screen shots
- ❑ Error output files
- ❑ Trace files
- ❑ Service Manager package to reproduce problem
- ❑ Custom functions and agents in use
- ❑ Diagnostic Zip
- ❑ Transaction log

For information on tracing, see the *iWay Service Manager User's Guide*.

User Feedback

In an effort to produce effective documentation, the Technical Content Management staff welcomes your opinions regarding this document. Please use the Reader Comments form at the end of this document to communicate your feedback to us or to suggest changes that will support improvements to our documentation. You can also contact us through our website, *http://documentation.informationbuilders.com/connections.asp*.

Thank you, in advance, for your comments.

iWay Software Training and Professional Services

Interested in training? Our Education Department offers a wide variety of training courses for iWay Software and other Information Builders products.

For information on course descriptions, locations, and dates, or to register for classes, visit our website, *http://education.informationbuilders.com*, or call (800) 969-INFO to speak to an Education Representative.

Interested in technical assistance for your implementation? Our Professional Services department provides expert design, systems architecture, implementation, and project management services for all your business integration projects. For information, visit our website, *http://www.informationbuilders.com/consulting*.

Chapter 1

Upgrading Omni Server and Omni-HealthData Governance Console on Windows Platforms

This chapter describes how to upgrade the primary components of Omni-HealthData version 3.1 on Windows platforms.

In this chapter:

- Upgrading Omni Server
- Installing a New Version of Omni-HealthData Governance Console
- Deploying Your Current Production Bundle on the Upgraded Omni Server
- Upgrading Your Current Production Bundle
- Reinitializing Your WSO2 Identity Server Configuration
- Reinitializing Your MData in Omni-HealthData Governance Console

Upgrading Omni Server

This section describes how to upgrade Omni Server, which consists of the following steps:

1. Backup your MData in Omni-HealthData Governance Console.

   For more information, see *How to Backup Your MData in Omni-HealthData Governance Console* on page 12.

2. Backup configuration properties updated in the Omni Console.

   For more information, see *How to Backup Configuration Properties Updated in the Omni Console* on page 12.

3. Stop all services and the controller.

   For more information, see *How to Stop All Services and the Controller* on page 13.

4. Stop Omni-HealthData Governance Console (Apache Tomcat and WSO2 Identity Server).

   For more information, see *How to Stop Omni-HealthData Governance Console (Apache Tomcat and WSO2 Identity Server)* on page 14.

5. Backup the Omni-HealthData Governance Console home directory.

   For more information, see *How to Backup the Omni-Health Data Governance Console Home Directory* on page 15.

6. Backup the omnigen home directory.

   For more information, see *How to Backup the Omnigen Home Directory* on page 15.

7. Backup Omni-HealthData databases.

   For more information, see *How to Backup Omni-HealthData Databases* on page 15.

8. Create the *omnihealthdata_upgrade* and *omnirepo_upgrade* databases.

   For more information, see *How to Create the omnihealthdata_upgrade and omnirepo_upgrade Databases* on page 15.

9. Download and install a new version of Omni-HealthData.

   For more information, see *How to Download and Install a New Version of Omni-HealthData* on page 15.

Procedure: How to Backup Your MData in Omni-HealthData Governance Console

1. Log on to Omni-HealthData Governance Console (OHDGC) to download metadata using your browser.

   For example:

   `http://omnihealthdata.ibi.com:9090/ogc`

2. Log on using the preauthorized WSO2 Identity Server local (primary) credentials.

   For example:

   - Username: **primary/super_a**
   - Password: **supera123**

3. Click *Administration* in the top menu, then select *Download Metadata* from the navigation bar.
4. Save the MData.xml file in the location where you store your backups.

Backup Configuration Properties Updated in the Omni Console

This section describes how to backup configuration properties that have been updated in the Omni Console.

Procedure: How to Backup Configuration Properties Updated in the Omni Console

1. Using your browser, open the Omni Console by entering the following URL:

   `https://yourhost.yourdomain.com:9500`

   For example:

```
https://omnihealthdata.ibi.com:9500
```

Note: You cannot use *localhost* in the URL. You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

2. Log on using the following credentials:
   - ❏ Username: **ibi**
   - ❏ Password: **ibi**
3. Make a note of any properties that were updated in the Configuration section, which can be accessed in the left pane.
4. Navigate to the *\omnihealthdata\properties* directory.

   For example:

   ```
   C:\omni\product\omnihealthdata\properties
   ```

5. Update the corresponding properties in the *og_configurations.properties* file based on any changes to the properties identified in step 3.
6. Save the *og_configurations.properties* file.

Procedure: How to Stop All Services and the Controller

1. Ensure that no work orders are currently running in the Omni Console.
2. Navigate to the *OmniServer* home directory.

   For example:

   ```
   C:\omni\product\omnihealthdata\omnigen\OmniServer
   ```

3. Open a command prompt window and type the following command to stop all services:

   ```
   omni stop-all
   ```

4. Upon successful notification that all services are stopped, enter the following command to stop the controller:

   ```
   omni stop-controller
   ```

Procedure: How to Stop Omni-HealthData Governance Console (Apache Tomcat and WSO2 Identity Server)

1. If Windows services are implemented:
   a. Open the Windows Services manager.
   b. Stop all services created by Omni-HealthData Governance Console (OHDGC).

      For example:

      ```
      iWay_ogc_*_<current_release>
      ```

2. If Windows Services are not implemented:
   a. Navigate to the OHDGC installation directory.

      For example:

      ```
      C:\omni\product\omnihealthdata\ohdgc
      ```

   b. Navigate to the location of the *tomcat.bat* file.

      For example:

      ```
      C:\omni\product\omnihealthdata\ohdgc\ogc\bin\ibi\
      ```

   c. Open a command prompt, enter the following command, then press *Enter* to stop Apache Tomcat:

      ```
      tomcatstop.exe
      ```

   d. When Apache Tomcat has stopped, open the WSO2 Identity Server Management Console in a browser by entering the following URL:

      ```
      https://yourhost.yourdomain.com:9443
      ```

      For example:

      ```
      https://omnihealthdata.ibi.com:9443
      ```

      Note: You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

   e. Log on using the following credentials:

      - Username: **admin**
      - Password: **admin**

   f. Click *Shutdown/Restart* in the Manage section of the left navigation panel.
   g. Click *Graceful Shutdown* to stop the WSO2 Identity Server.

Procedure: How to Backup the Omni-Health Data Governance Console Home Directory

1. Navigate to the *omnihealthdata* subdirectory where your base installation is located.

   For example:

   ```
   C:\omni\product\omnihealthdata\
   ```

2. Rename the *ohdgc* directory to:

   ```
   ohdgc_<project_revision>
   ```

Procedure: How to Backup the Omnigen Home Directory

1. Navigate to the *omnihealthdata* subdirectory where your base install is located.

   For example:

   ```
   C:\omni\product\omnihealthdata\
   ```

2. Rename the *omnigen* directory to:

   ```
   omnigen_<project_revision>
   ```

Procedure: How to Backup Omni-HealthData Databases

Upon successful shutdown of the WSO2 Identity Server, backup the corresponding *omnihealthdata* and *omnirepo* databases for the Omni-HealthData (OHD) environment you want to upgrade.

Procedure: How to Create the omnihealthdata_upgrade and omnirepo_upgrade Databases

1. If the *omnihealthdata_upgrade* database already exists, then drop this database.
2. Recreate the *omnihealthdata_upgrade* database, following the same instructions found in the *Installation Prerequisites* section of the *Omni-HealthData™ Installer User's Guide* for the *omnihealthdata* database.
3. If the *omnirepo_upgrade* database already exists, then drop this database.
4. Recreate the *omnirepo_upgrade* database, following the same instructions found in the *Installation Prerequisites* section of the *Omni-HealthData™ Installer User's Guide* for the *omnirepo* database.

Procedure: How to Download and Install a New Version of Omni-HealthData

1. Download the latest binary package (ohdbinarypackage*bin.zip) from the Information Builders Technical Support Center (*http://techsupport.informationbuilders.com*).
2. Unzip the *ohdbinarypackage* into the *omnihealthdata* subdirectory where your base install is located.

For example:

```
C:\omni\product\omnihealthdata
```

3. Navigate to the omnihealthdata\properties subdirectory.

   For example:

   ```
   C:\omni\product\omnihealthdata\properties
   ```

4. Ensure that the memory settings in the *og_configurations.properties* file reflect the current production settings from the Omni Console. If not, then you must update them.

5. If the *og_configurations_upgrade.properties* file does not exist, then create it by copying the *og_configurations.properties* file, and saving it as *og_configurations_upgrade.properties*, after updating the following entries:

   ```
   ogs.db.url=jdbc:sqlserver://<host>/omnihealthdata_upgrade;
        sendStringParametersAsUnicode=false
   dq.db.url= jdbc:sqlserver://<host>/omnirepo_upgrade;
        sendStringParametersAsUnicode=false
   hv.db.url= jdbc:sqlserver://<host>/omnihealthdata_upgrade;
        sendStringParametersAsUnicode=false
   ```

6. Navigate to the created *omnigen* home directory.

   For example:

   ```
   C:\omni\product\omnihealthdata\omnigen
   ```

7. Navigate to the *sample_configuration* directory and compare the *og_configurations.properties* file with the existing *og_configurations.properties* file in the following subdirectory:

   ```
   C:\omni\product\omnihealthdata\properties
   ```

   If any new properties have been added to the file with your new release, manually copy them into both the following files and save them:

   ```
   C:\omni\product\omnihealthdata\properties\og_configurations.properties
   ```

   ```
   C:\omni\product\omnihealthdata\properties
   \og_configurations_upgrade.properties
   ```

8. Navigate back to the *omnigen* home directory.

9. Run the following configuration command:

   ```
   omnigen configure -Dconfiguration.properties=C:\omni\product\
   omnihealthdata\properties\og_configuration_upgrade.properties
   ```

Installing a New Version of Omni-HealthData Governance Console

This section describes how to install a new version of Omni-HealthData Governance Console (OHDGC) on Windows platforms.

Procedure: How to Install Omni-HealthData Governance Console

1. Navigate to the *omnigen* home directory.

   For example:

   ```
   C:\omni\product\omnihealthdata\omnigen
   ```

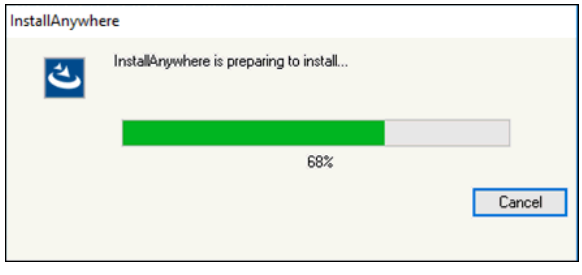
2. Navigate to the *omnihealthdatagc* directory.

   For example:

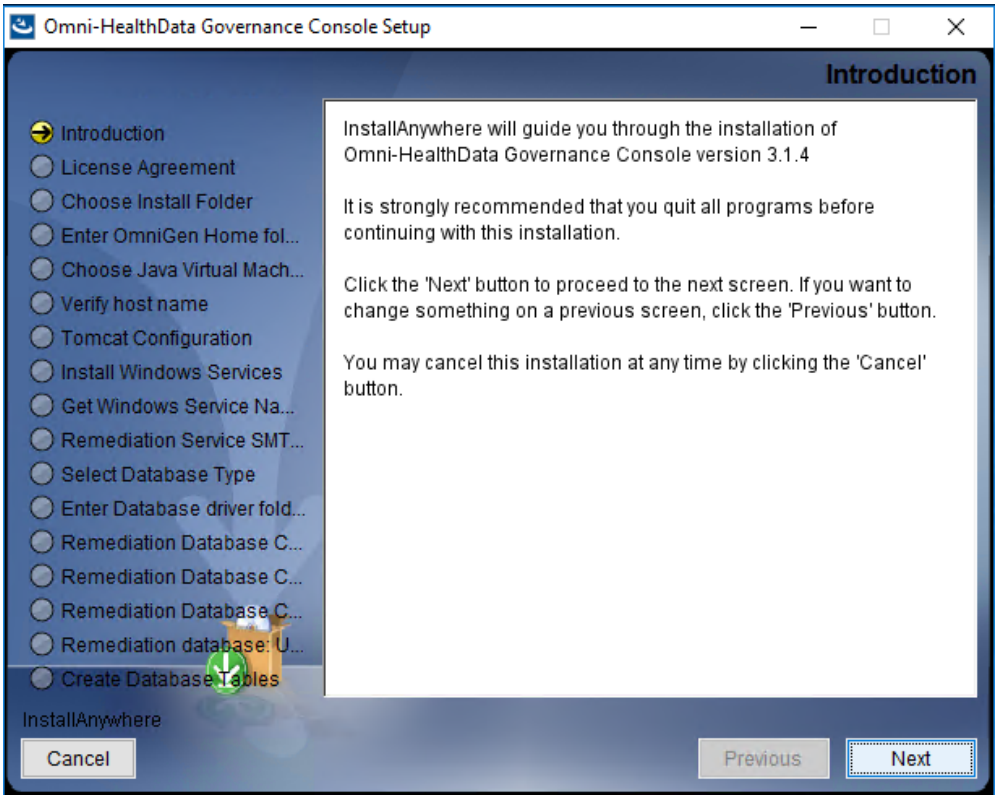
   ```
   C:\omni\product\omnihealthdata\omnigen\omnihealthdatagc
   ```

3. Right-click the *OHDGCInstallerWindows.exe* file, and select *Run as administrator* from the context menu.

   The InstallAnywhere window opens, as shown in the following image.

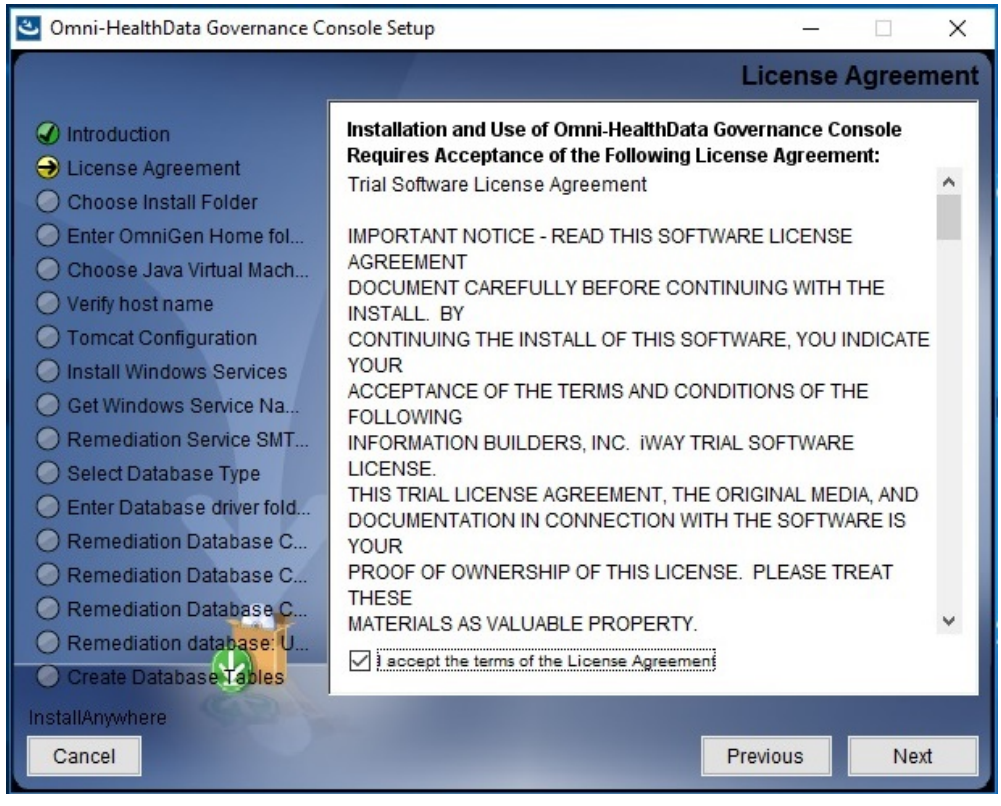


When the installation is ready, the Introduction pane opens, as shown in the following image.



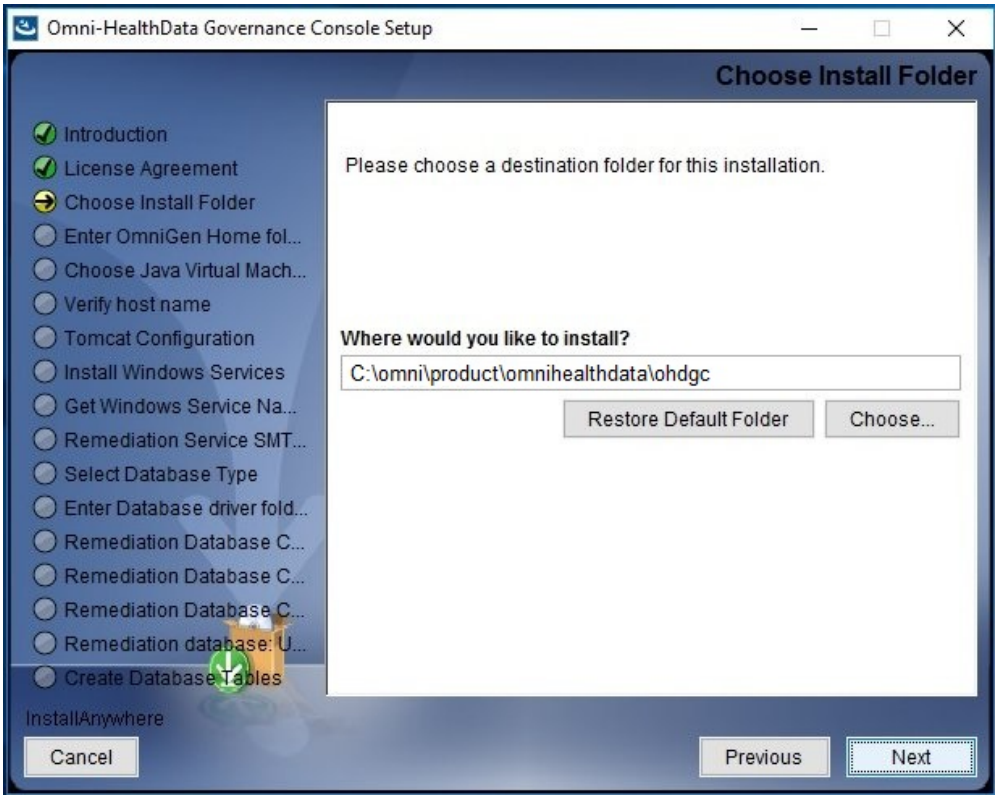
4. Click *Next* to continue.

The License Agreement pane opens, as shown in the following image.



5. Read the License Agreement, select the *I accept the terms of the License Agreement* check box, and then click *Next*.

The Choose Install Folder pane opens, as shown in the following image.



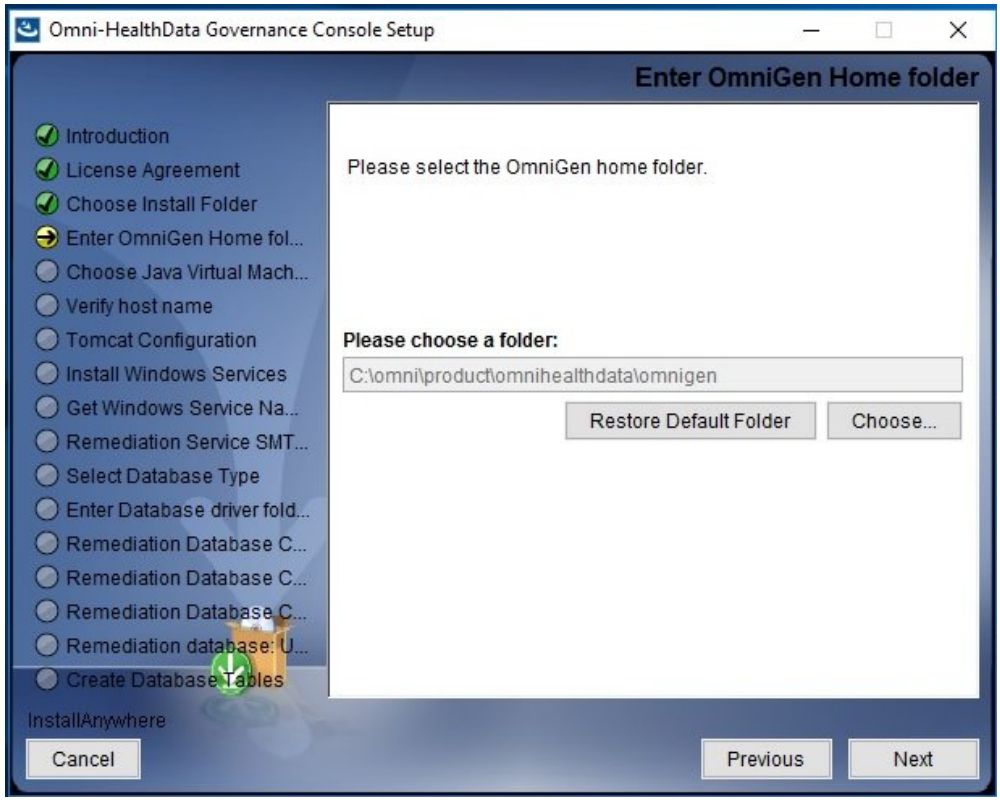
6. In the *Where would you like to install?* field, enter the location where you want to install Omni-HealthData Governance Console (OHDGC) components.

   For example:

   ```
   C:\omni\product\omnihealthdata\ohdgc
   ```

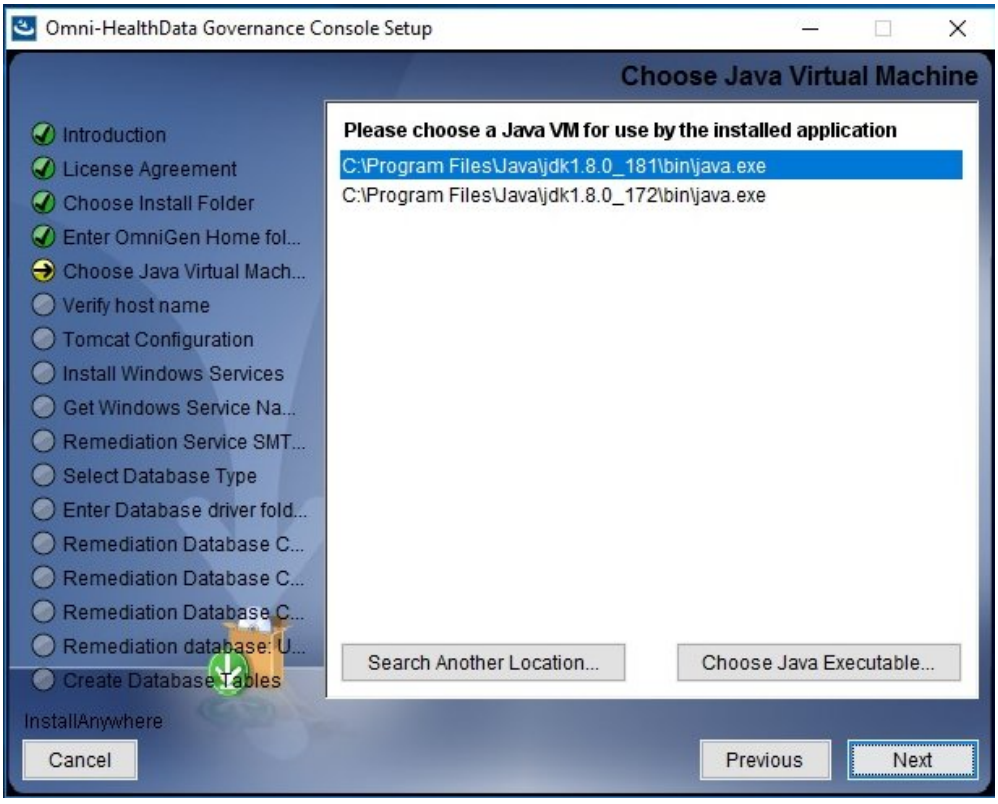
7. Click *Next*.

The Enter OmniGen Home folder pane opens, as shown in the following image.



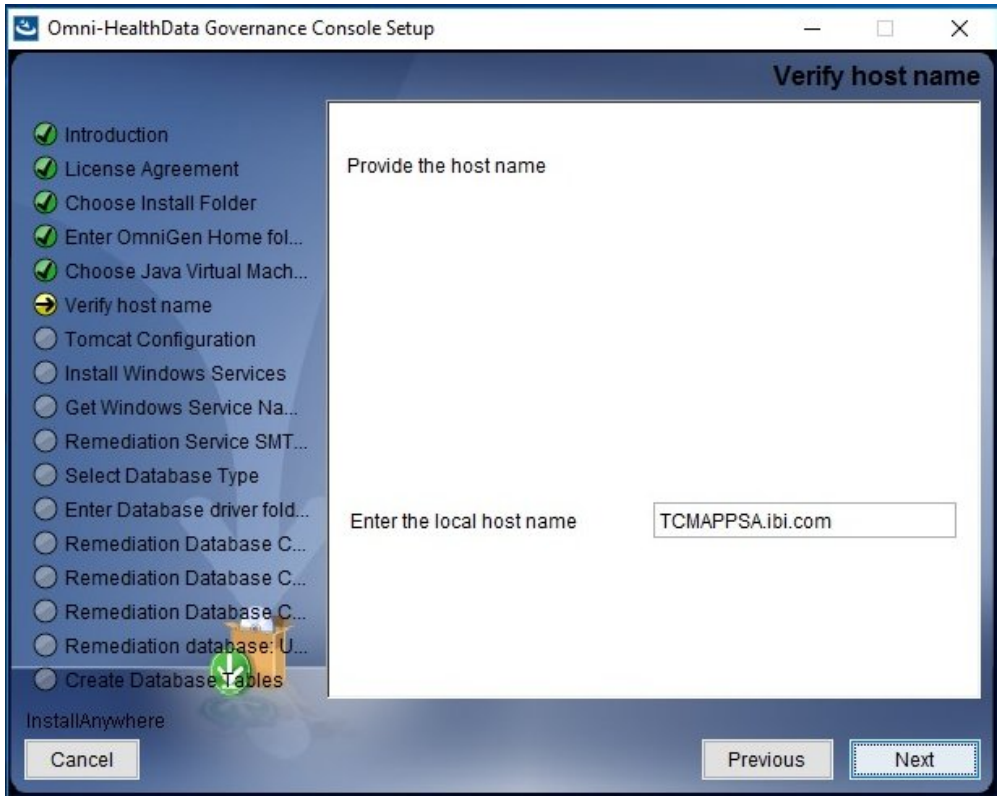
8. In the *Please choose a folder* field, enter (or browse to) the location you specified for the *omnigen* home folder, and then click *Next*.

The Choose Java Virtual Machine pane opens, as shown in the following image.



9. Ensure that the Java version selected is version 1.8 or higher, and then click *Next*.

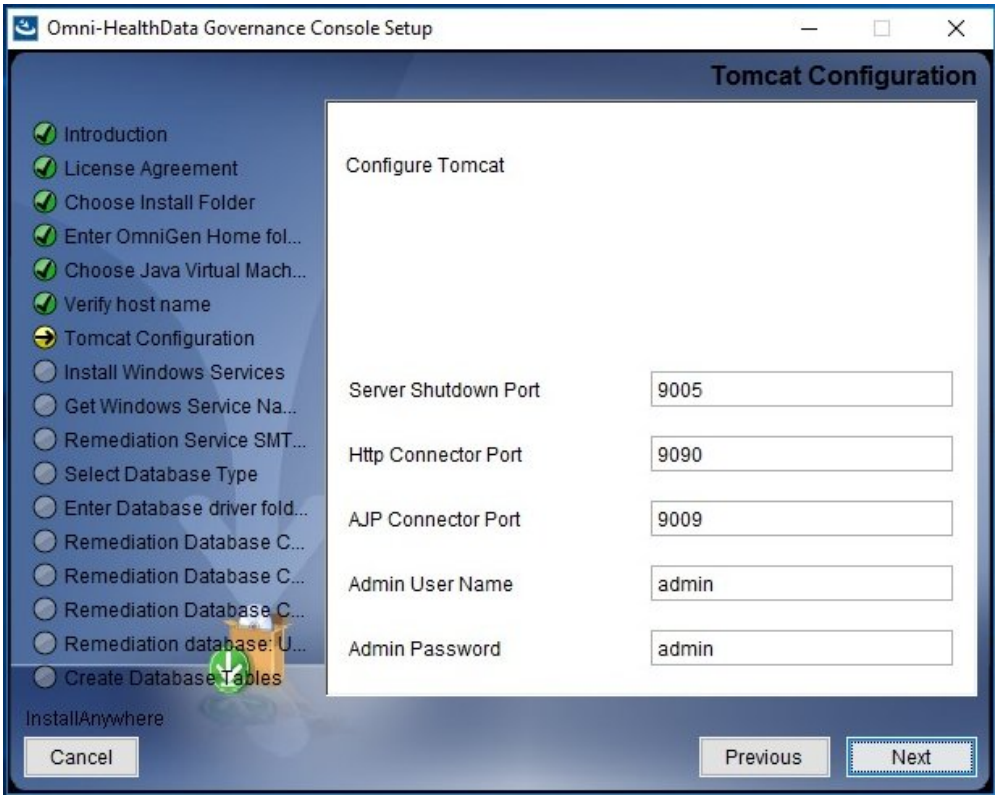
The Verify host name pane opens, as shown in the following image.



The default host name is this machine on which you are currently installing.

10. Enter the local host name in the designated field, and then click *Next*.

The Tomcat Configuration pane opens, as shown in the following image.

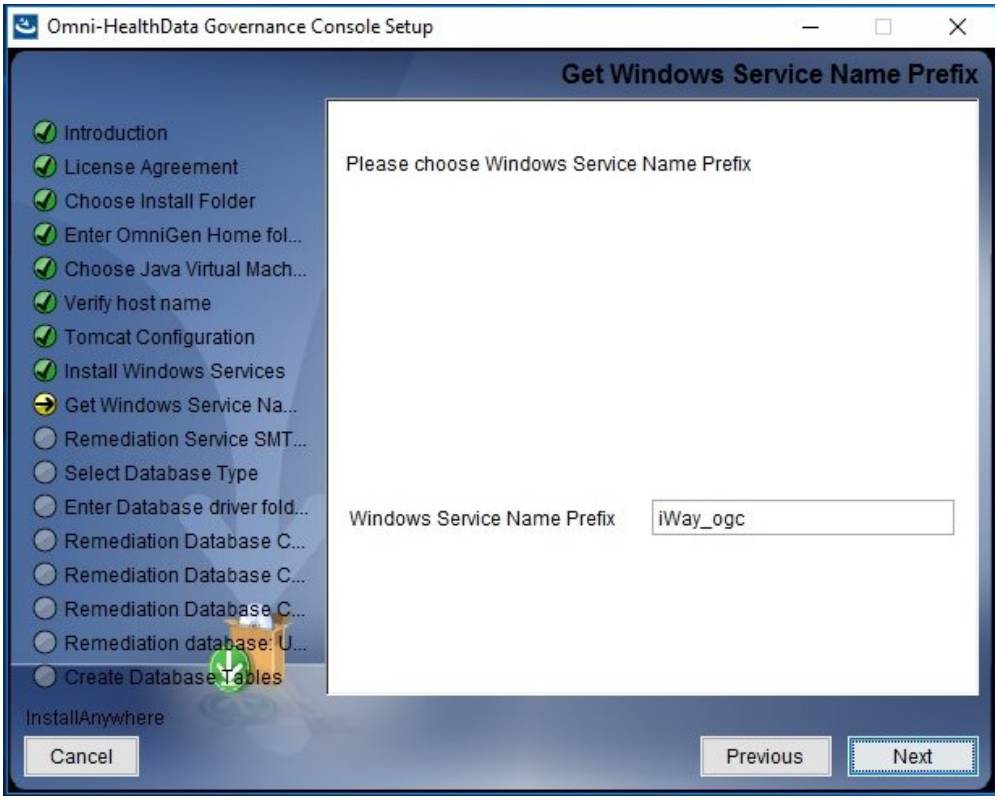


11. Verify the port values that are indicated by default and modify accordingly if required.
12. Click *Next*.

The Install Windows Services pane opens, as shown in the following image.

13. Select *Yes* if you would like to have WSO2 and Apache Tomcat components for OHDGC installed as Windows services.
14. Click *Next*.

The Get Windows Service Name Prefix pane opens, as shown in the following image.

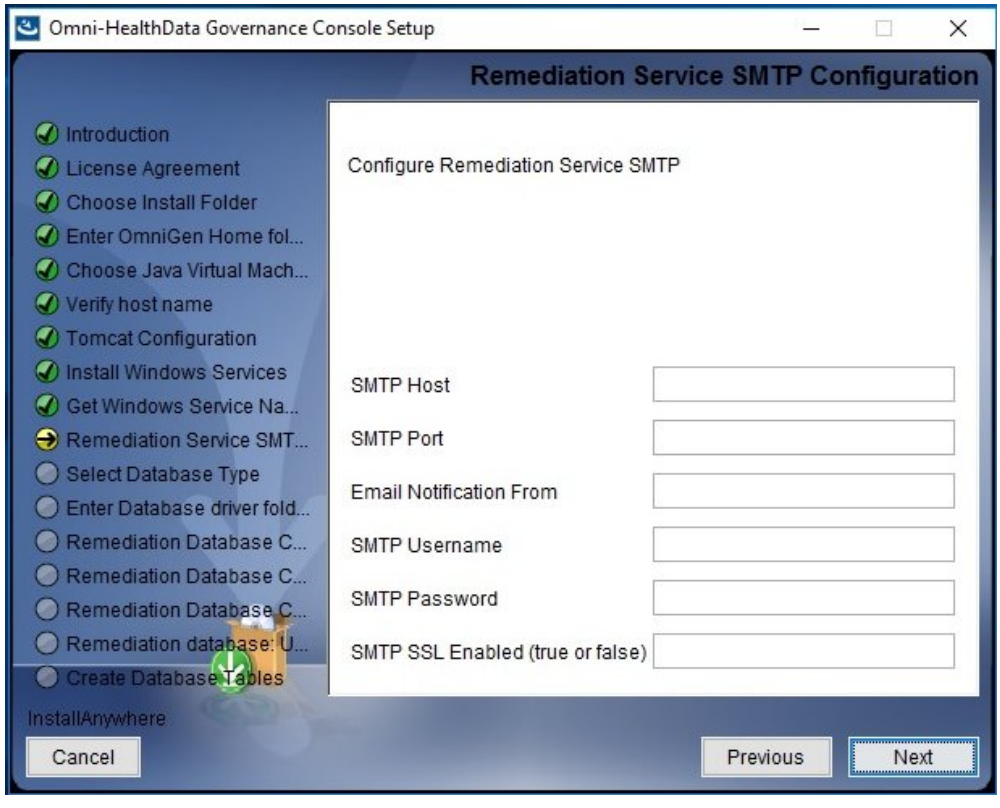


If you selected to install WSO2 and Apache Tomcat components as Windows services, then, by default, *iWay_ogc* is the prefix that will be used. You can specify a different prefix as required.

Note: It is recommended to append an identifier to the *iWay_ogc* prefix that matches your Omni-HealthData release number (for example, *_314* or *_315*). Older Windows services can then be easily identified and deleted as they are retired from use.

15. Click *Next*.

The Remediation Service SMTP Configuration pane opens, as shown in the following image.



16. Leave the parameter values blank unless you want to configure SMTP for your remediation service, and then click *Next*.
17. To configure SMTP for your remediation service, provide values for the following parameters as they apply to your SMTP email server:

    - **SMTP Host.** Host name of your SMTP server (for example, *smtp.ibi.com*).
    - **SMTP Port.** SMTP port on that server (usually port 25).
    - **Email Notification From.** Email address from which the assignment email will originate (for example, *OmniGen_Remediation@ibi.com*).
    - **SMTP Username.** User name for accessing the email server.
    - **SMTP Password.** Password associated with the user name for accessing the email server.

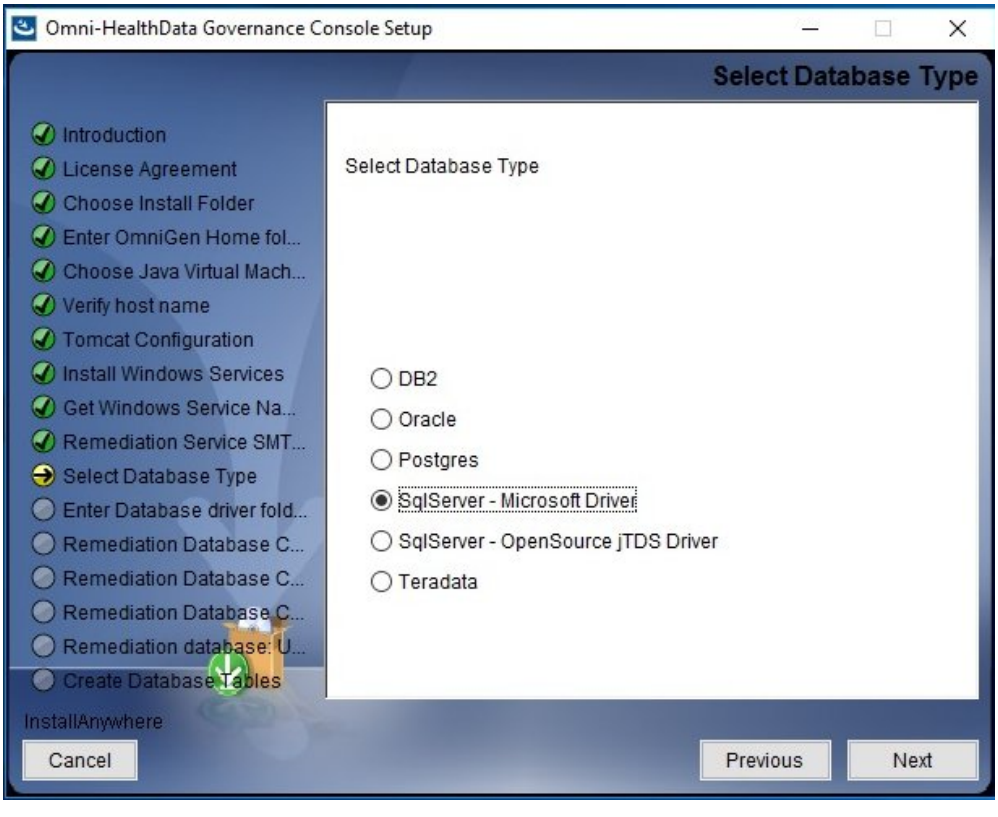
- **SMTP SSL Enabled (true or false).** Specify *true* if your email server supports or requires SSL authentication.

In addition, each user who will receive email notifications must have a valid email address in their WSO2 Identity Server (WSO2 IS) user profile.

- Each LDAP user with the *Data Steward* or *Data Supervisor* role, and who will receive Assignment emails, must have a valid email address in their Active Directory profile. When it makes the LDAP connection, WSO2 IS will bring back those email addresses to its *Local User Store* profile of the user.
- Each hardcoded user in the WSO2 IS *Primary* domain must have an email in their WSO2 IS user profile.

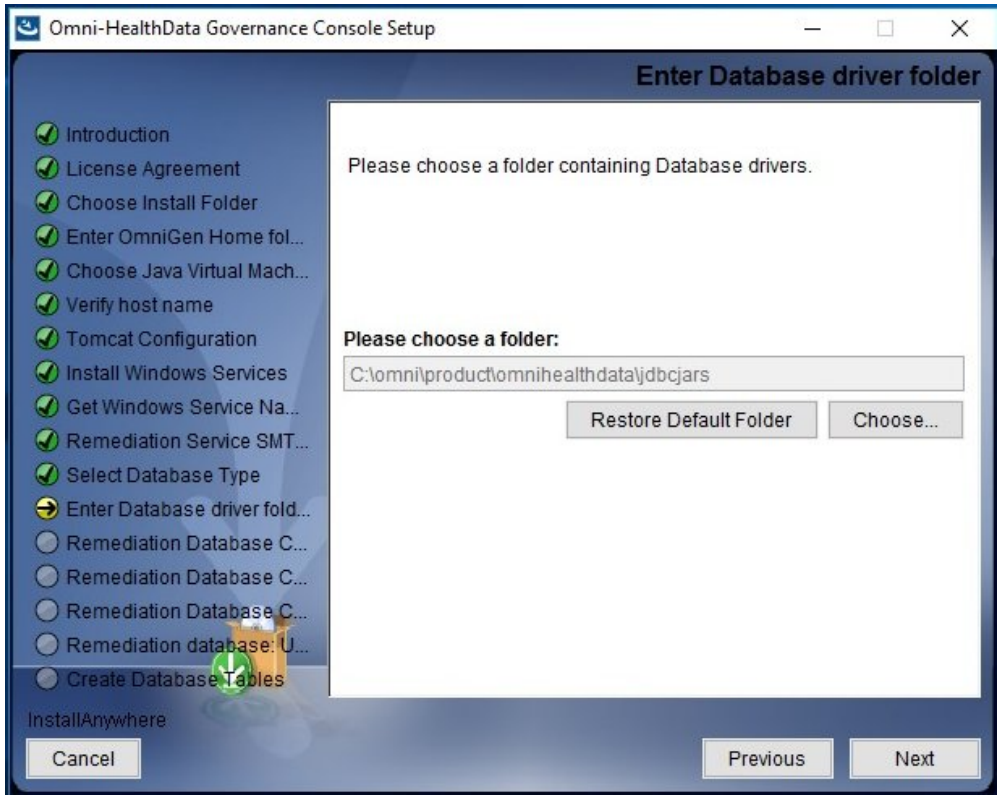
18. Click *Next* to continue.

The Select Database Type pane opens, as shown in the following image.



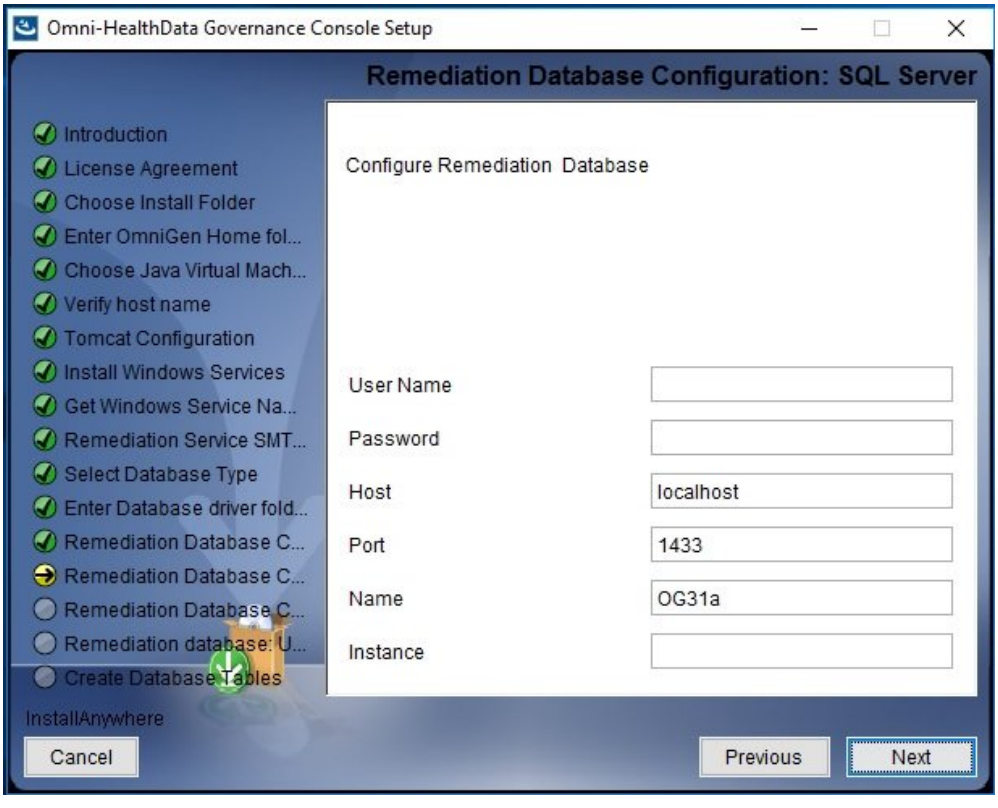
19. Select the type of database from the list that you want to use with OHDGC, and then click *Next*.

The Enter Database driver folder pane opens, as shown in the following image.



20. Specify the location of your JDBC .jar file(s), and then click *Next*.

The Remediation Database Configuration pane opens for your selected database type, as shown in the following image.

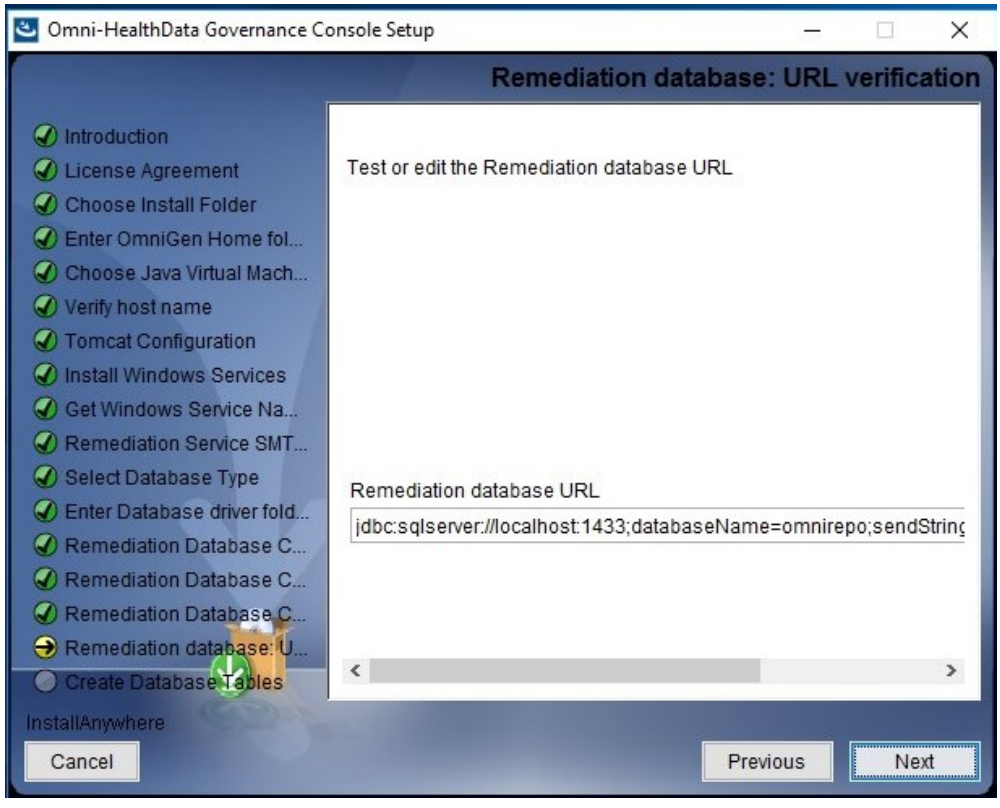


21. Review the information to ensure that it matches the corresponding entry in the *og_configuration.properties* file.

    The database name should be your existing production Remediation database name, for example, *OG31a*.

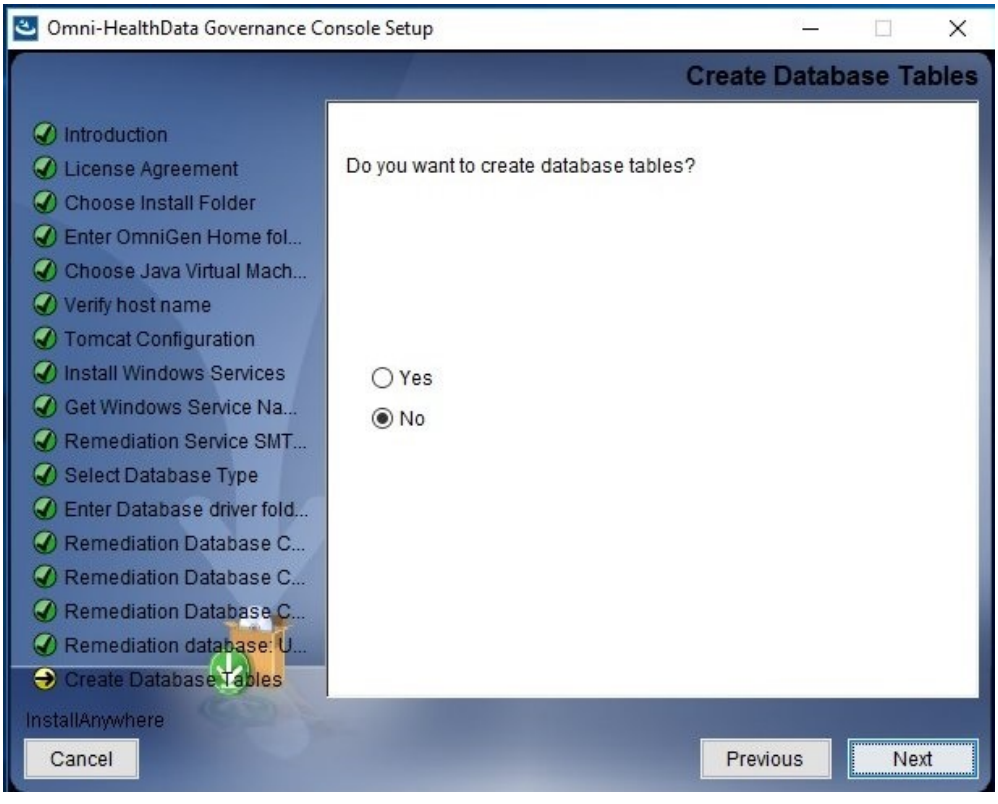
22. Click *Next* to continue.

The Remediation database: URL verification pane opens, as shown in the following image.



23. Specify the remediation database URL string that matches the corresponding entry in the *og_configuration.properties* file, and then click *Next*.

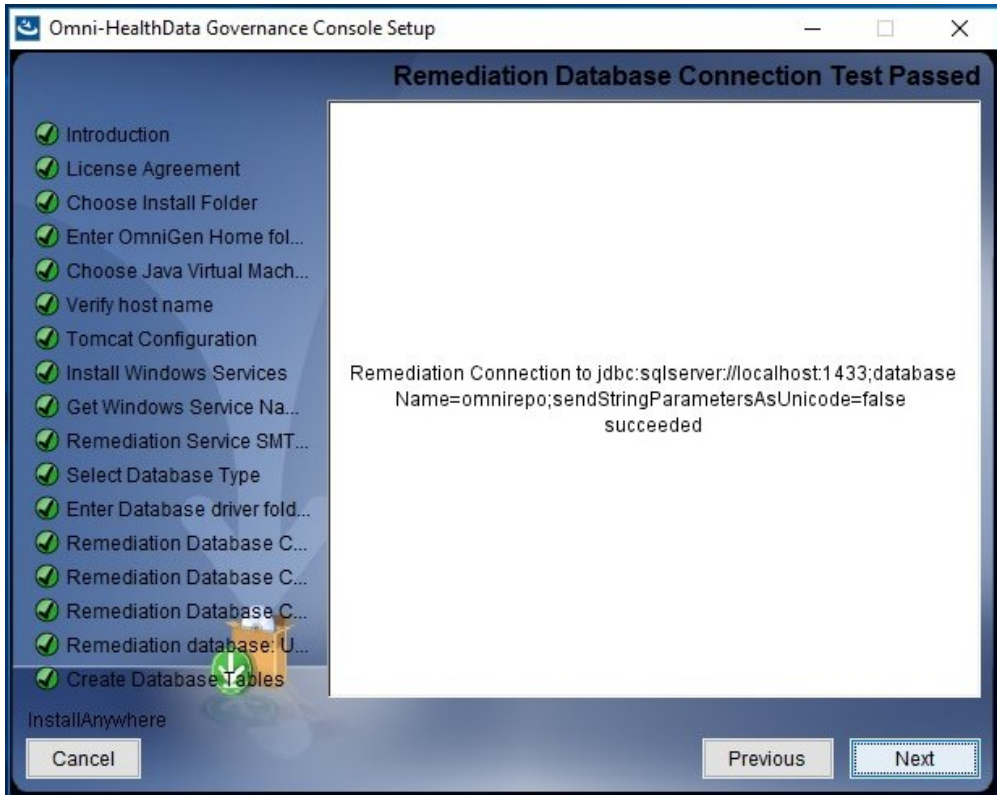
The Create Database Tables pane opens, as shown in the following image.



24. Select *No* to not create the Remediation database tables, and then click *Next*.

    Note: Since the remediation tables already exist, there is no need to create them. By selecting *No*, you will also preserve your existing remediation data.

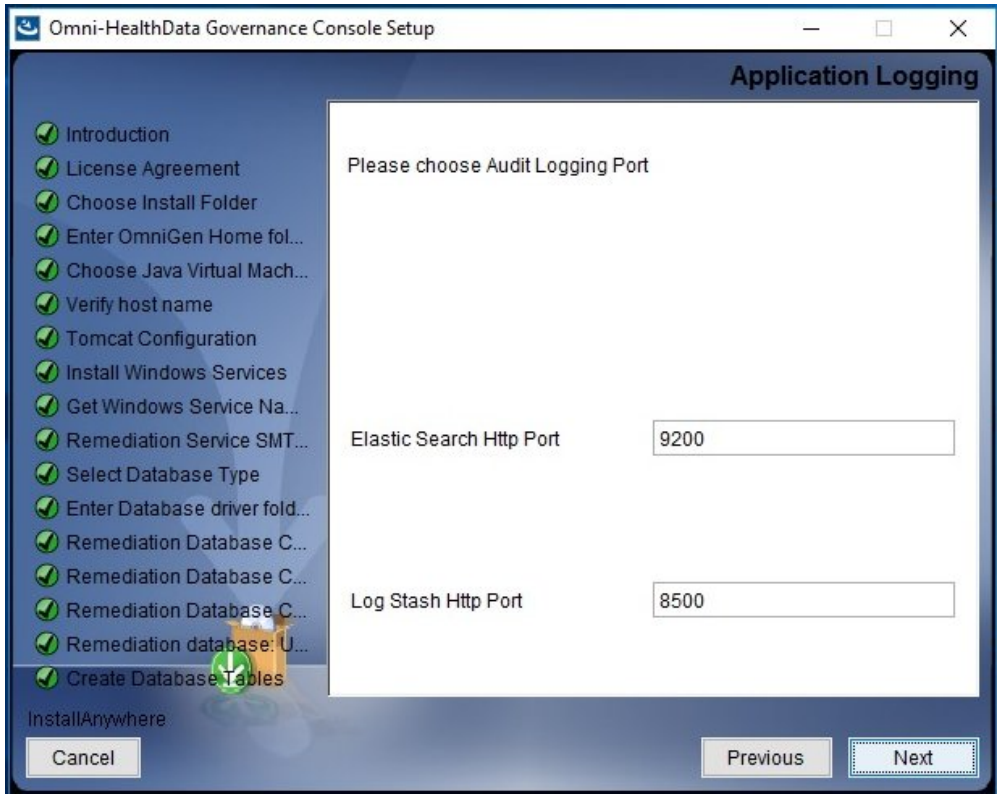
If the database URL string that you specified is correct and your database is available, the Remediation Database Connection Test Passed pane opens, as shown in the following image.



25. Click *Next* to continue.

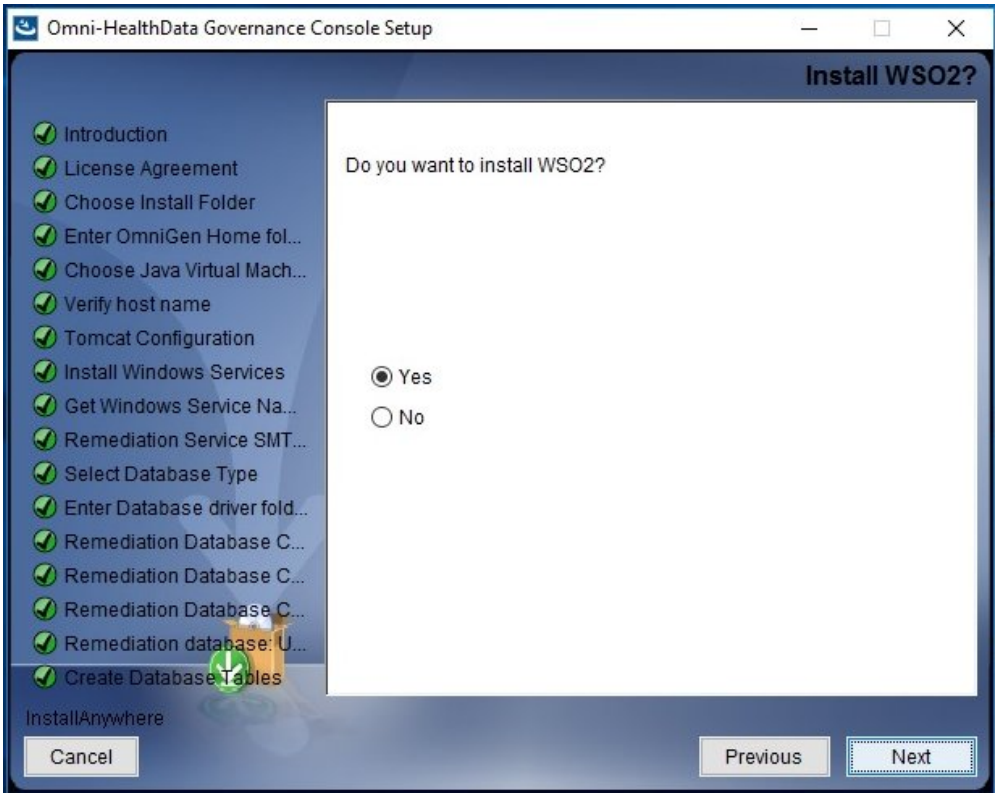
The Install User Audit Logging pane opens, as shown in the following image.

26. If you select *Yes* and click *Next*, you must specify port values for Elastic Search and Log Stash in the Application Logging pane, as shown in the following image.



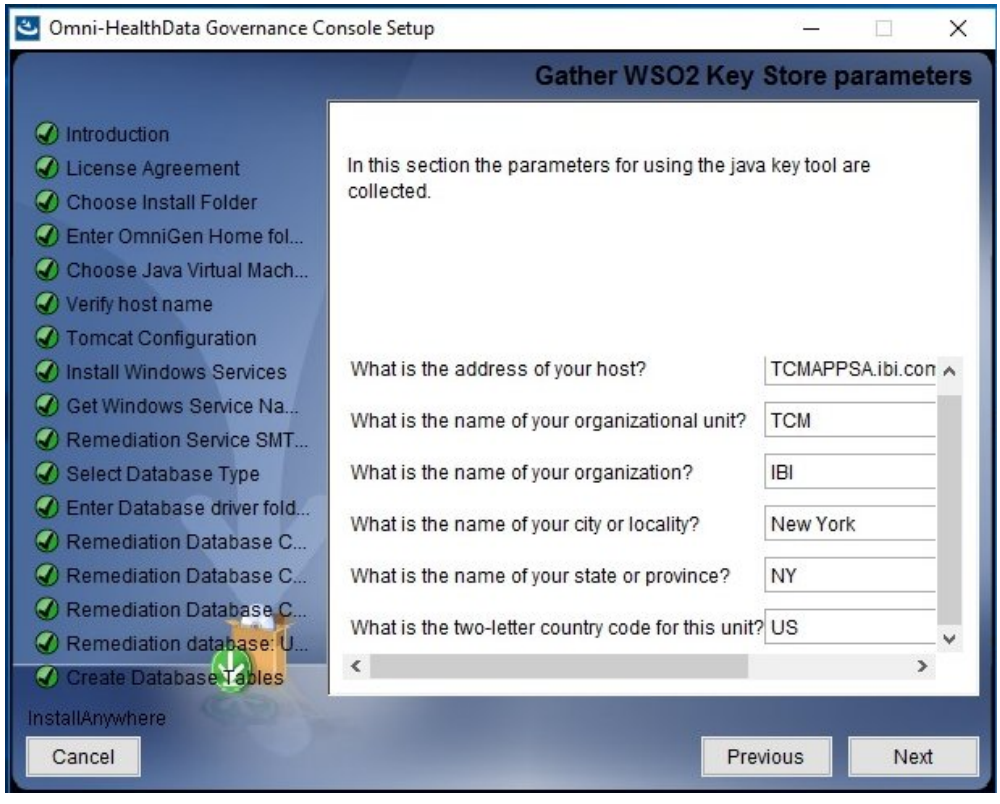
27. Click *Next* to continue.

The Install WSO2 pane opens, as shown in the following image.



28. Select *Yes*, and then click *Next*.

The Gather WSO2 Key Store parameters pane opens, as shown in the following image.

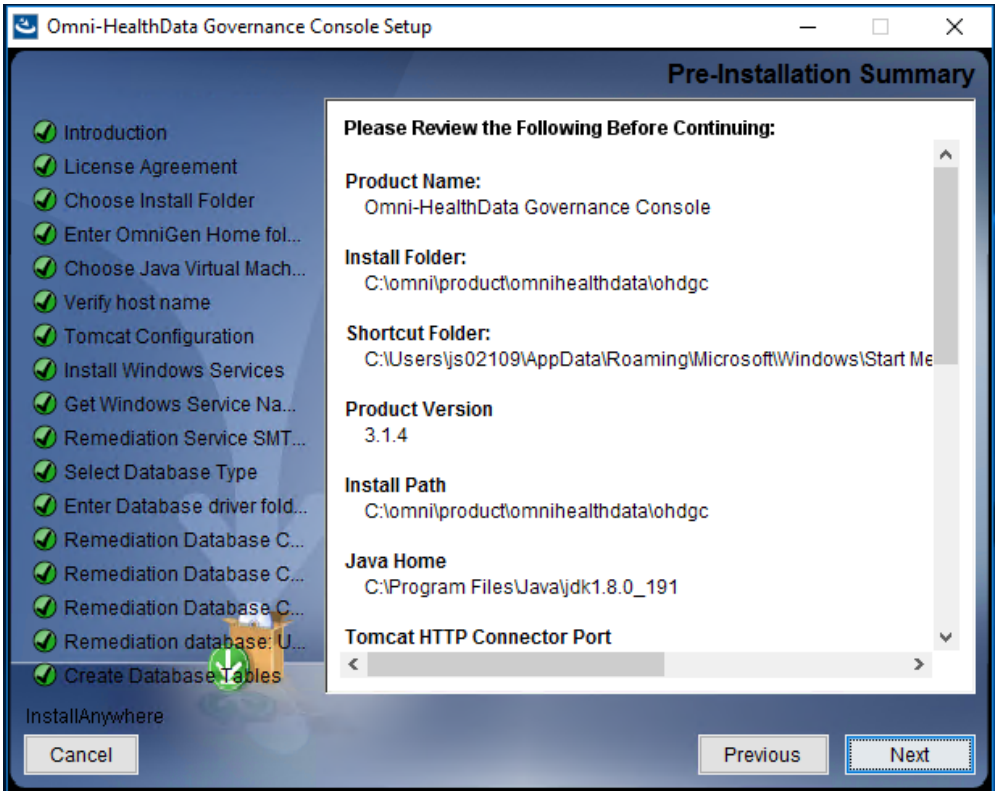


29. Collect the parameters to generate the certificate for WSO2 IS.

    These parameters are used to build a unique certificate to secure the communication between Omni-HealthData Governance Console (OHDGC) and WSO2 Identity Server (IS). Ensure that the address of your host is correct (not *localhost*), and then enter values for the remaining parameters.

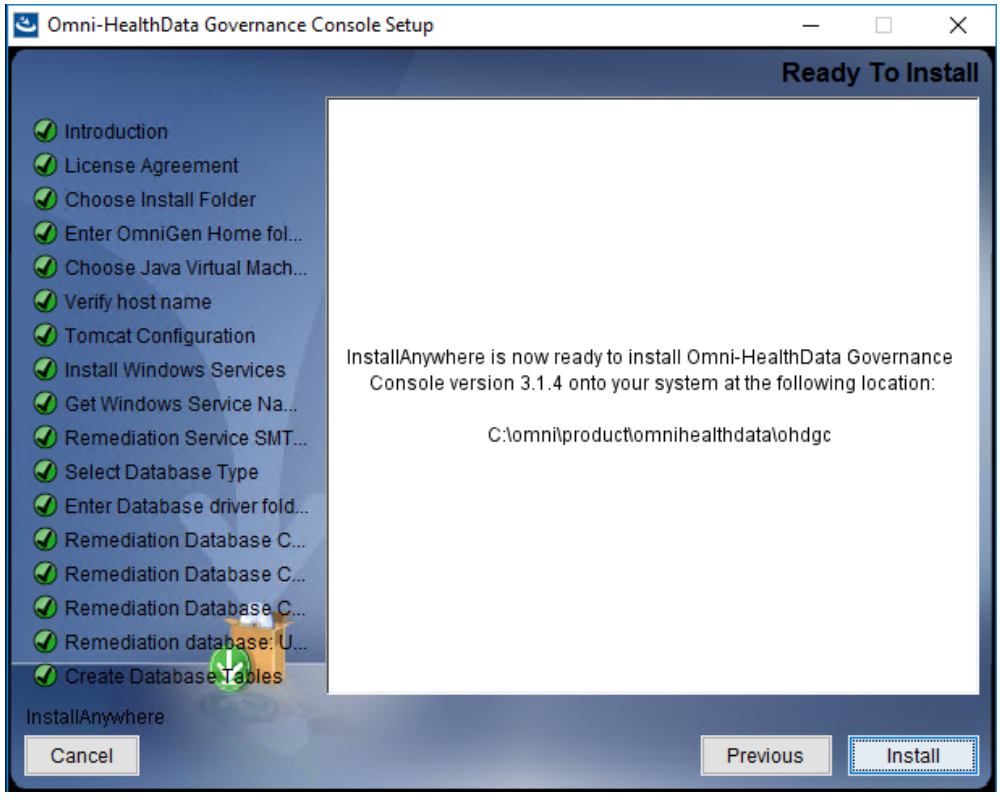
30. Click *Next* to continue.

The Pre-Installation Summary pane opens, as shown in the following image.



31. Review the installation settings that you specified for OHDGC and then click *Next* to continue.

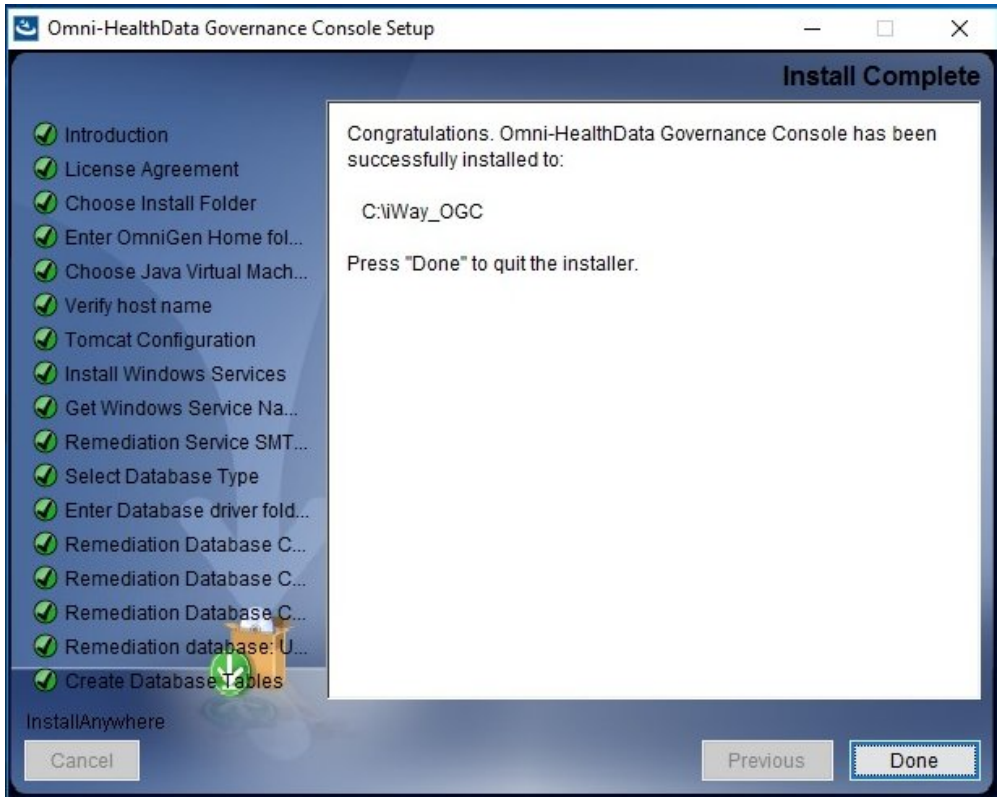
The Ready To Install pane opens, indicating that the configuration for installation is complete, as shown in the following image.



32. Click *Install* to proceed with the installation.

The Installing Omni-HealthData Governance Console pane opens, which displays the progress of your OHDGC installation, as shown in the following image.

The Omni-HealthData Governance Console (OHDGC) installation is complete when the Install Complete pane is displayed, as shown in the following image.



33. Click *Done*.

Deploying Your Current Production Bundle on the Upgraded Omni Server

This section describes how to deploy your current production bundle on the upgraded Omni Server.

Procedure: How to Deploy Your Current Production Bundle on the Upgraded Omni Server

1. Navigate to the *OmniServer* home directory.

   For example:

   ```
   C:\omni\product\omnihealthdata\omnigen\OmniServer
   ```

2. Enter the following command to stop the controller:

   ```
   omni start-controller
   ```

3. Using your browser, open the Omni Console by entering the following URL:

   ```
   https://yourhost.yourdomain.com:9500
   ```

   For example:

   ```
   https://omnihealthdata.ibi.com:9500
   ```

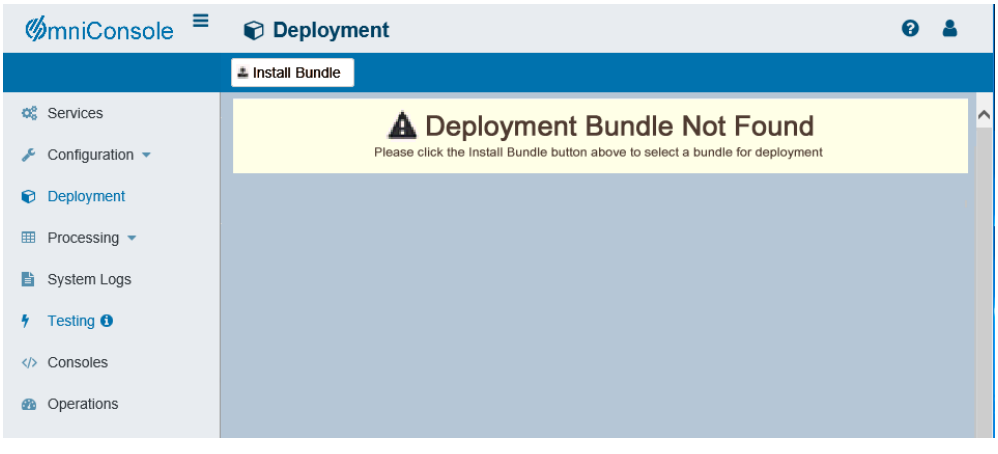
   Note: You cannot use *localhost* in the URL. You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

4. Log on using the following credentials:

   - Username: **ibi**
   - Password: **ibi**

5. Deploy the bundle by clicking *Deployment* in the left pane.

   The Deployment pane opens, with the message *Deployment Bundle Not found*, as shown in the following image.

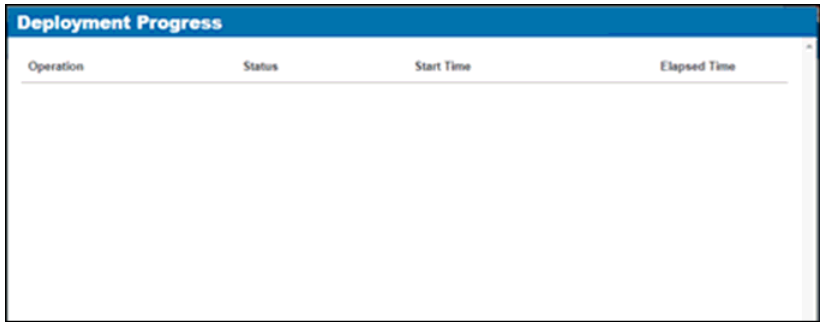


6. Click *Install Bundle*.

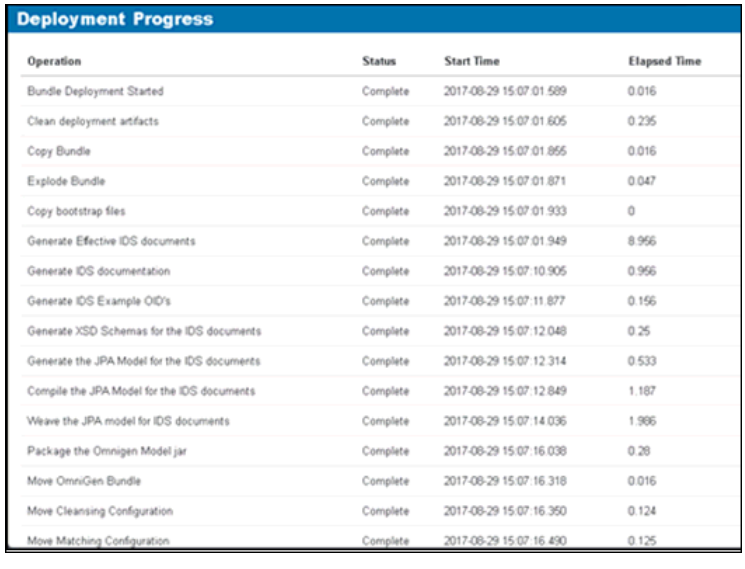
   The Open dialog box is displayed.

7. Navigate to the location of your current production deployment bundle file.
8. Select your current production deployment bundle file and click *Open*.

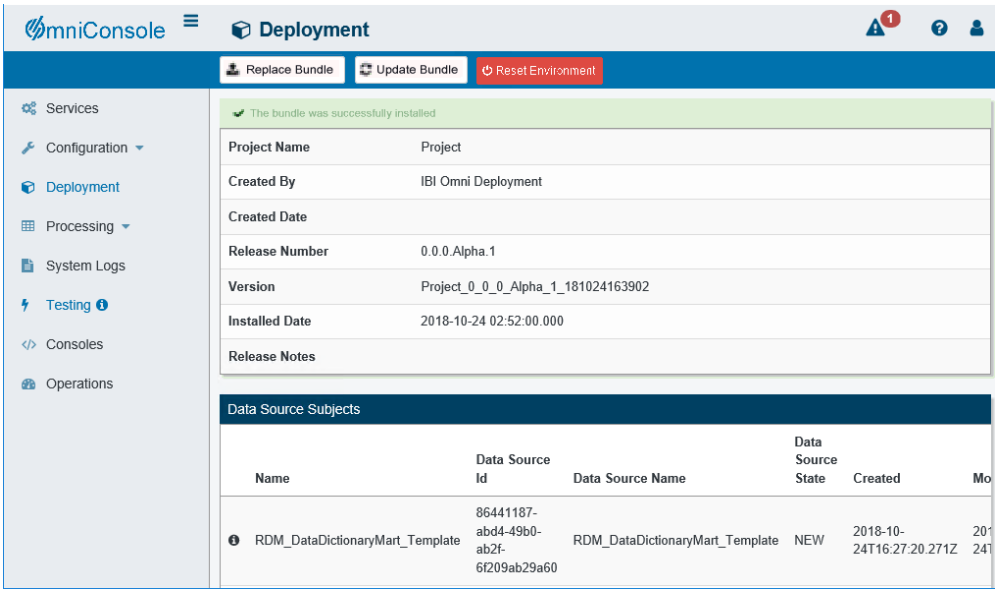
A blank Deployment Progress window opens, as shown in the following image.



The Deployment Progress window will start to display information and progress during the whole deployment process, as shown in the following image.



When the process is completed, a *successfully installed* message is displayed, as shown in the following image.



Upgrading Your Current Production Bundle

This section describes how to upgrade your current production bundle with the changes that are supplied with your upgrade.

Procedure: How to Upgrade Your Current Production Bundle

1. Navigate to the location of the default deployment bundle file that ships with your upgrade.

   The default bundle can be found in the *omnihealthdatabundle* folder under your *omnigen* home directory. For example:

   ```
   C:\omni\product\omnihealthdata\omnigen\omnihealthdatabundle
   ```

2. Save the default bundle to the location where you manage your deployment bundles.
3. Replace the mastering folder in the default bundle with the mastering folder from your current production bundle.
4. Save the bundle according to your naming conventions as your upgraded production bundle.

Procedure: How to Deploy Your Upgraded Production Bundle

1. Navigate to the *omnigen* home directory.

   For example:

   ```
   C:\omni\product\omnihealthdata\omnigen
   ```

2. Type the following command to stop the controller:

   ```
   omni stop-controller
   ```

3. Run the following command, setting the server back to your production configuration:

   ```
   omnigen configure -Dconfiguration.properties=C:\omni\product\
   omnihealthdata\properties\og_configuration.properties
   ```

4. Copy (backup) the following folders:

   ```
   \omnigen\OmniServer\bundle
   \omnigen\OmniServer\cmd
   \omnigen\OmniServer\dbms
   ```

5. Copy the permanent iWay Data Quality Center (DQC) licenses from your backup to your new implementation.

   ```
   \omnigen\OmniServer\mastering\runtime\license_keys
   ```

6. Open a command prompt and enter the following command, then press *Enter*:

   ```
   omni start-controller
   ```

   Note: When installation has completed, a BUILD Successful message appears, but the startup process continues for a few minutes. You must wait for this process to complete before proceeding to the next step.

7. Using your browser, open the Omni Console by entering the following URL:

   ```
   https://yourhost.yourdomain.com:9500
   ```

   For example:

   ```
   https://omnihealthdata.ibi.com:9500
   ```

   Note: You cannot use *localhost* in the URL. You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

8. Log on using the following credentials:

   - Username: **ibi**

- Password: **ibi**

9. Deploy the bundle by clicking *Deployment* in the left pane.

   The Deployment pane opens, with the *Update Bundle* option.

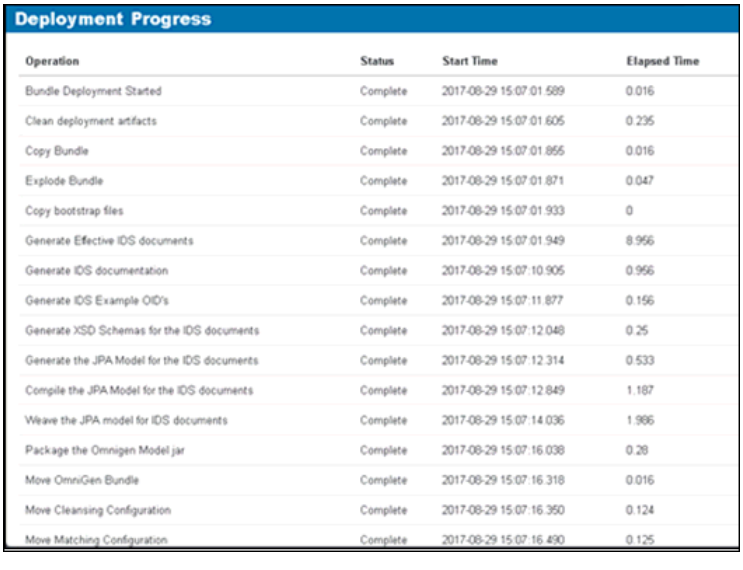
10. Click *Update Bundle*.

    The Open dialog box is displayed.

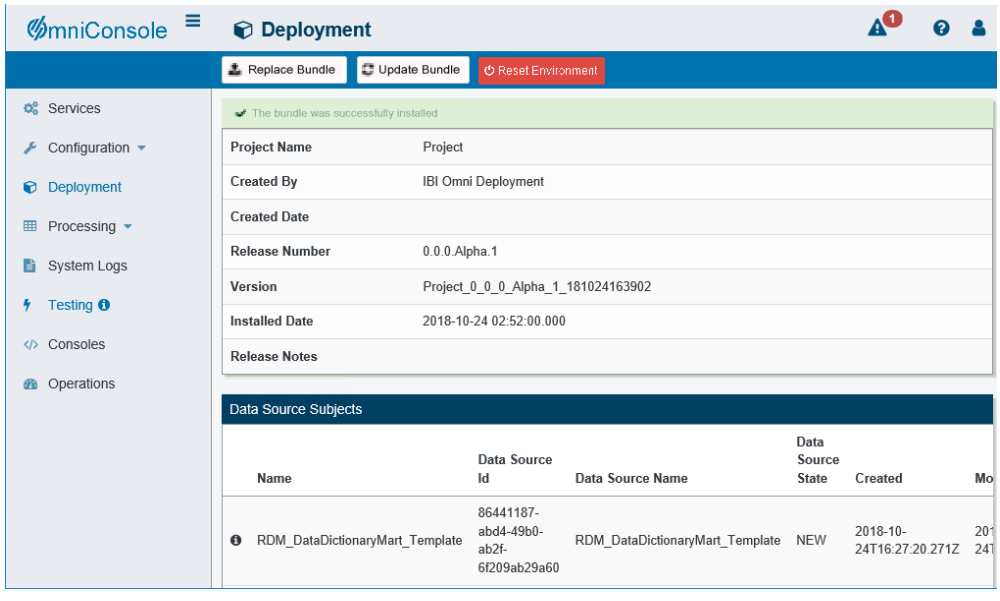
11. Navigate to the location of your upgraded production deployment bundle file.
12. Select your deployment bundle file and click *Open*.

    A blank Deployment Progress window opens, as shown in the following image.

The Deployment Progress window will start to display information and progress during the whole deployment process, as shown in the following image.

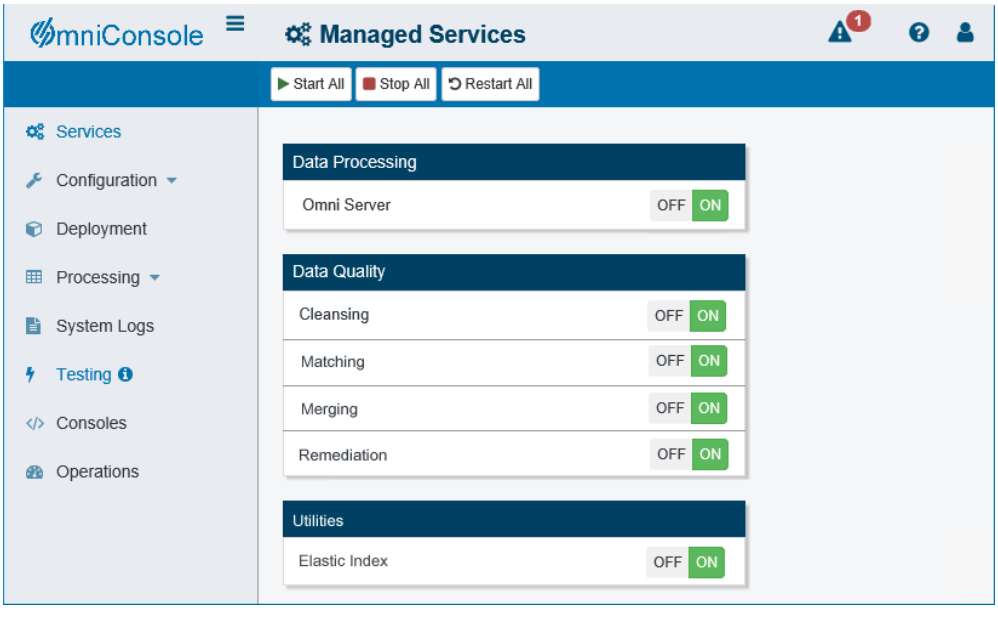


When the process is completed, a *successfully installed* message is displayed, as shown in the following image.



13. Start Omni Server and the related services by clicking *Services* in the left pane and then clicking *Start All*.

If the memory on your system is insufficient, you can also start each service one at a time. Start from the Utilities section and work upwards, as shown in the following image.



14. After starting the Matching service for the first time, you must navigate to the `repos_<subject>_wgid` and `repos_<subject>_wpk` tables in the *omnirepo* database, and drop their corresponding indexes, as they are not required and will impact performance:

    - `repos_<subject>_wgid_ix0`
    - `repos_<subject>_wpk_ix0`

Reinitializing Your WSO2 Identity Server Configuration

This section describes how to reinitialize your WSO2 Identity Server configuration.

Procedure: How to Reinitialize Your WSO2 Configuration

1. Navigate to the following directory:

   `C:\omni\product\omnihealthdata\ohdgc\ogc\bin\tools`

2. Replace the following wso2_is folder with your backup copy of the wso2_is folder:

   `C:\omni\product\omnihealthdata\ohdgc\ogc\bin\tools\wso2_is`

Reinitializing Your MData in Omni-HealthData Governance Console

This section describes how to reinitialize your MData in Omni-HealthData Governance Console (OHDGC).

Procedure: How to Reinitialize Your MData in OHDGC

1. If Windows services are implemented:
    1. Open the Windows Services manager.
    2. Copy the properties for the following services from:

       `iWay_ogc_<old_release>_*`

       to:

       `iWay_ogc_<new_release>_*_`

    3. Start the <*new_release*> services:

       For example:

       `iWay_ogc_<new_release>_*`

    4. Turn off the following properties for the <*old_release*> services:

       `iWay_ogc`

    5. Remove the <*old_release*> services at your convenience.

       For example:

       `iWay_ogc_<old_release>_*`

2. If Windows services are not implemented:
    1. Navigate to the Omni-HealthData Governance Console (OHDGC) installation directory.

       For example:

       `C:\omni\product\omnihealthdata\ohdgc`

    2. Navigate to the following subdirectory:

       `C:\omni\product\omnihealthdata\ohdgc\ogc\bin\ibi`

    3. Enter the following command in the command prompt:

       `ogcstart.exe`

3. Navigate to the following directory:

   `C:\omni\product\omnihealthdata\ohdgc\ogc\bin\ibi`

4. Log on to OHDGC and load the metadata using your browser.

   For example:

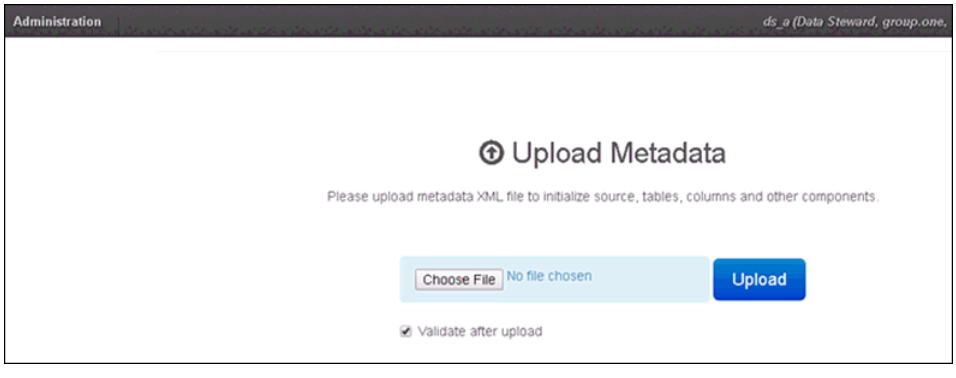
   `http://omnihealthdata.ibi.com:9090/ogc`

5. Log on using the preauthorized WSO2 Identity Server local (primary) credentials, which can be used to perform other startup actions until site-specific credentials and permissions are added.

   For example:

   - Username: **primary/super_a**
   - Password: **supera123**

   The Upload Metadata pane opens, as shown in the following image.



6. Click *Choose File* and navigate to the following folder:

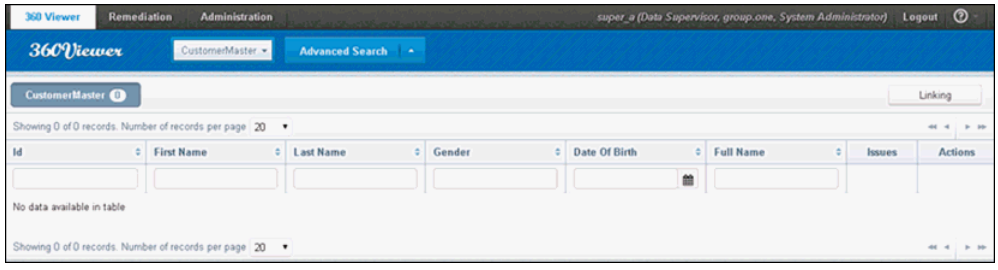
   `<OHDGCInstall_Dir>\ogc\bin\ibi\mdata`

   For example:

   `C:\omni\product\omnihealthdata\ogc\bin\ibi\mdata`

7. Select the *MData.xml* file.
8. Ensure that the *Validate after upload* check box is selected, then click *Upload*.

OHDGC opens and displays the 360 Viewer page, as shown in the following image.



Omni Server and OHDGC are now upgraded and ready for use.

Chapter 2

Upgrading Omni Server and Omni-HealthData Governance Console on Linux Platforms

This chapter describes how to upgrade the primary components of Omni-HealthData version 3.1 on Linux platforms.

In this chapter:

- Upgrading Omni Server
- Installing a New Version of Omni-HealthData Governance Console
- Deploying Your Current Production Bundle on the Upgraded Omni Server
- Upgrading Your Current Production Bundle
- Reinitializing Your WSO2 Identity Server Configuration
- Reinitializing Your MData in Omni-HealthData Governance Console

Upgrading Omni Server

This section describes how to upgrade Omni Server, which consists of the following steps:

1. Backup your MData in Omni-HealthData Governance Console.

   For more information, see *How to Backup Your MData in Omni-HealthData Governance Console* on page 54.

2. Backup configuration properties updated in the Omni Console.

   For more information, see *How to Backup Configuration Properties Updated in the Omni Console* on page 54.

3. Stop all services and the controller.

   For more information, see *How to Stop All Services and the Controller* on page 55.

4. Stop Omni-HealthData Governance Console (Apache Tomcat and WSO2 Identity Server).

   For more information, see *How to Stop Omni-HealthData Governance Console (Apache Tomcat and WSO2 Identity Server)* on page 55.

5. Backup the Omni-HealthData Governance Console home directory.

   For more information, see *How to Backup the Omni-HealthData Governance Console Home Directory* on page 56.

6. Backup the omnigen home directory.

   For more information, see *How to Backup the Omnigen Home Directory* on page 56.

7. Backup Omni-HealthData databases.

   For more information, see *How to Backup the Omni-HealthData Databases* on page 57.

8. Create the *omnihealthdata_upgrade* and *omnirepo_upgrade* databases.

   For more information, see *How to Create the omnihealthdata_upgrade and omnirepo_upgrade Databases* on page 57.

9. Download and install a new version of Omni-HealthData.

   For more information, see *How to Download and Install a New Version of Omni-HealthData* on page 57.

Procedure: How to Backup Your MData in Omni-HealthData Governance Console

1. Log on to Omni-HealthData Governance Console (OHDGC) to download metadata using your browser.

   For example:

   `http://omnihealthdata.ibi.com:9090/ogc`

2. Log on using the preauthorized WSO2 Identity Server local (primary) credentials.

   For example:

   - Username: **primary/super_a**
   - Password: **supera123**

3. Click *Administration* in the top menu, then select *Download Metadata* from the navigation bar.
4. Save the MData.xml file in the location where you store your backups.

Backup Configuration Properties Updated in the Omni Console

This section describes how to backup configuration properties that have been updated in the Omni Console.

Procedure: How to Backup Configuration Properties Updated in the Omni Console

1. Using your browser, open the Omni Console by entering the following URL:

   `https://yourhost.yourdomain.com:9500`

   For example:

```
https://omnihealthdata.ibi.com:9500
```

Note: You cannot use *localhost* in the URL. You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

2. Log on using the following credentials:
   - ❏ Username: **ibi**
   - ❏ Password: **ibi**
3. Make a note of any properties that were updated in the Configuration section, which can be accessed in the left pane.
4. Navigate to the */omnihealthdata/properties* directory.

   For example:

   ```
   data/omni/product/omnihealthdata/properties
   ```

5. Update the corresponding properties in the *og_configurations.properties* file based on any changes to the properties identified in step 3.
6. Save the *og_configurations.properties* file.

Procedure: How to Stop All Services and the Controller

1. Ensure that no work orders are currently running in the Omni Console.
2. Navigate to the *OmniServer* home directory.

   For example:

   ```
   /data/omni/product/omnihealthdata/omnigen/OmniServer
   ```

3. Open a terminal window and type the following command to stop all services:

   ```
   ./omni.sh stop-all
   ```

4. Upon successful notification that all services are stopped, enter the following command to stop the controller:

   ```
   ./omni.sh stop-controller
   ```

Procedure: How to Stop Omni-HealthData Governance Console (Apache Tomcat and WSO2 Identity Server)

1. Navigate to the OHDGC installation directory.

   For example:

```
/data/omni/product/omnihealthdata/ohdgc
```

2. Navigate to the location of the *tomcatstop.sh* file.

   For example:

   ```
   /data/omni/product/omnihealthdata/ohdgc/ogc/bin/ibi/
   ```

3. Open a terminal window, enter the following command, then press *Enter* to stop Apache Tomcat:

   ```
   ./tomcatstop.sh
   ```

4. When Apache Tomcat has stopped, open the WSO2 Identity Server Management Console in your browser by entering the following URL:

   ```
   https://yourhost.yourdomain.com:9443
   ```

   For example:

   ```
   https://omnihealthdata.ibi.com:9443
   ```

   Note: You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

5. Log on using the following credentials:

   - Username: **admin**
   - Password: **admin**

6. Click *Shutdown/Restart* in the Manage section of the left navigation panel.
7. Click *Graceful Shutdown* to stop the WSO2 Identity Server.

Procedure: How to Backup the Omni-HealthData Governance Console Home Directory

1. Navigate to the *omnihealthdata* subdirectory where your base installation is located.

   For example:

   ```
   /data/omni/product/omnihealthdata
   ```

2. Rename the *ohdgc* directory to:

   ```
   ohdgc_<project_revision>
   ```

Procedure: How to Backup the Omnigen Home Directory

1. Navigate to the *omnihealthdata* subdirectory where your base installation is located.

   For example:

```
/data/omni/product/omnihealthdata
```

2. Rename the *omnigen* directory to:

   ```
   omnigen_<project_revision>
   ```

Procedure: How to Backup the Omni-HealthData Databases

Upon successful shutdown of the WSO2 Identity Server, backup the corresponding *omnihealthdata* and *omnirepo* databases for the Omni-HealthData (OHD) environment you want to upgrade.

Procedure: How to Create the omnihealthdata_upgrade and omnirepo_upgrade Databases

1. If the *omnihealthdata_upgrade* database already exists, then drop this database.
2. Recreate the *omnihealthdata_upgrade* database, following the same instructions found in the *Installation Prerequisites* section of the *Omni-HealthData™ Installer User's Guide* for the *omnihealthdata* database.
3. If the *omnirepo_upgrade* database already exists, then drop this database.
4. Recreate the *omnirepo_upgrade* database, following the same instructions found in the *Installation Prerequisites* section of the *Omni-HealthData™ Installer User's Guide* for the *omnirepo* database.

Procedure: How to Download and Install a New Version of Omni-HealthData

1. Download the latest binary package (ohdbinarypackage*bin.tar) from the Information Builders Technical Support Center (*http://techsupport.informationbuilders.com*).
2. Unzip the *ohdbinarypackage* into the *omnihealthdata* subdirectory where your base install is located.

   For example:

   ```
   /data/omni/product/omnihealthdata
   ```

3. Navigate to the omnihealthdata/properties subdirectory.

   For example:

   ```
   /data/omni/product/omnihealthdata/properties
   ```

4. Ensure that the memory settings in the *og_configurations.properties* file reflect the current production settings from the Omni Console. If not, then you must update them.
5. If the *og_configurations_upgrade.properties* file does not exist, then create it by copying the *og_configurations.properties* file, and saving it as *og_configurations_upgrade.properties*, after updating the following entries:

```
ogs.db.url=jdbc:postgresql://localhost:5432/omnihealthdata_upgrade
dq.db.url=jdbc:postgresql://localhost:5432/omnirepo_upgrade
hv.db.url=jdbc:postgresql://localhost:5432/omnihealthdata_upgrade
```

6. Navigate to the created *omnigen* home directory.

   For example:

   ```
   /data/omni/product/omnihealthdata/omnigen
   ```

7. Navigate to the *sample_configuration* directory and compare the *og_configurations.properties* file with the existing *og_configurations.properties* file in the following subdirectory:

   ```
   /data/omni/product/omnihealthdata/properties
   ```

   If any new properties have been added to the file with your new release, manually copy them into the following files and save them both:

   ```
   /data/omni/product/omnihealthdata/properties/
   og_configurations.properties

   /data/omni/product/omnihealthdata/properties/
   og_configurations_upgrade.properties
   ```

8. Navigate back to the *omnigen* home directory.
9. Run the following configuration command:

   ```
   ./omnigen.sh configure -Dconfiguration.properties=/data/omni/product/
   omnihealthdata/properties/og_configuration_upgrade.properties
   ```

Installing a New Version of Omni-HealthData Governance Console

This section describes how to install a new version of Omni-HealthData Governance Console (OHDGC) on Linux platforms.

Procedure: How to Upgrade Omni-HealthData Governance Console

1. Navigate to the *omnigen* home directory.

   For example:

   ```
   /data/omni/product/omnihealthdata/omnigen
   ```

2. Navigate to the *omnihealthdatagc* directory.

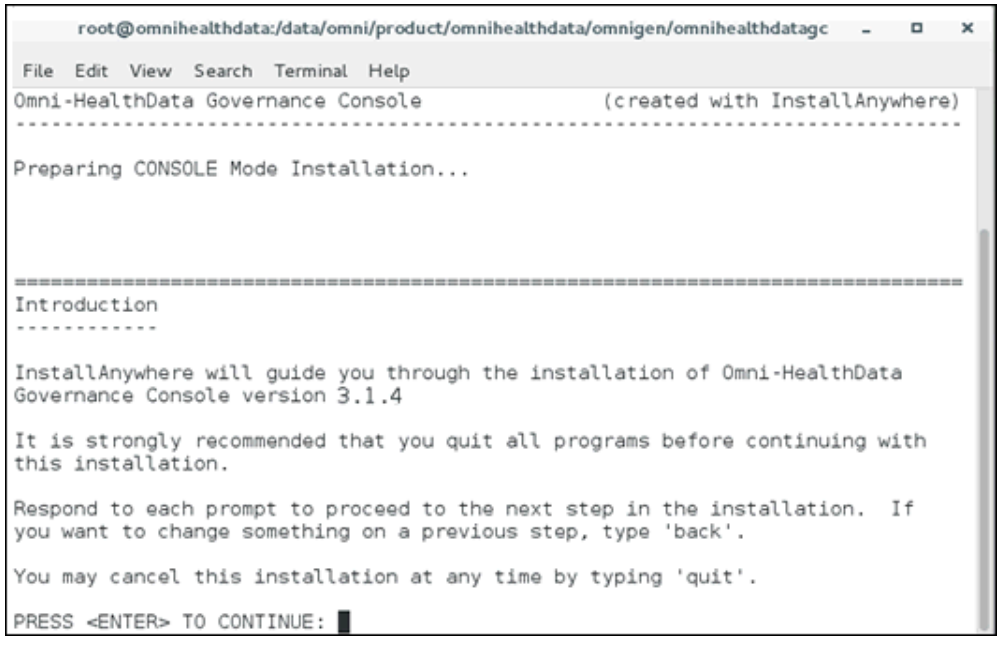
   For example:

   ```
   /data/omni/product/omnihealthdata/omnigen/omnihealthdatagc
   ```

3. Enter the following command to run OHDGC installer in console mode:

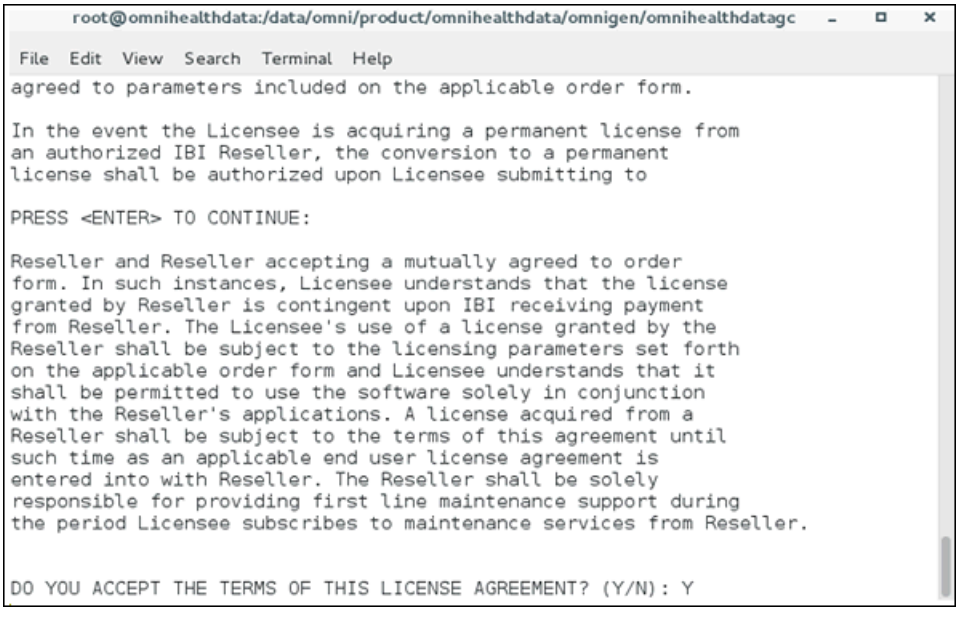
   ```
   ./OHDGCInstallerLinux*.bin
   ```

   OHDGC installer starts and displays the Introduction pane, as shown in the following image.



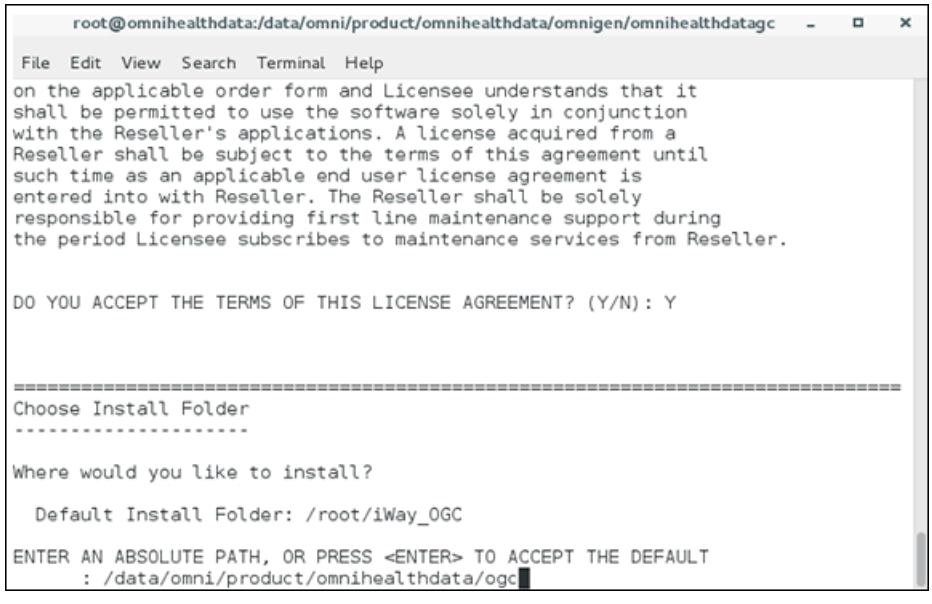
4. Press *Enter* to continue.

The License Agreement Terms and Conditions pane opens, as shown in the following image.



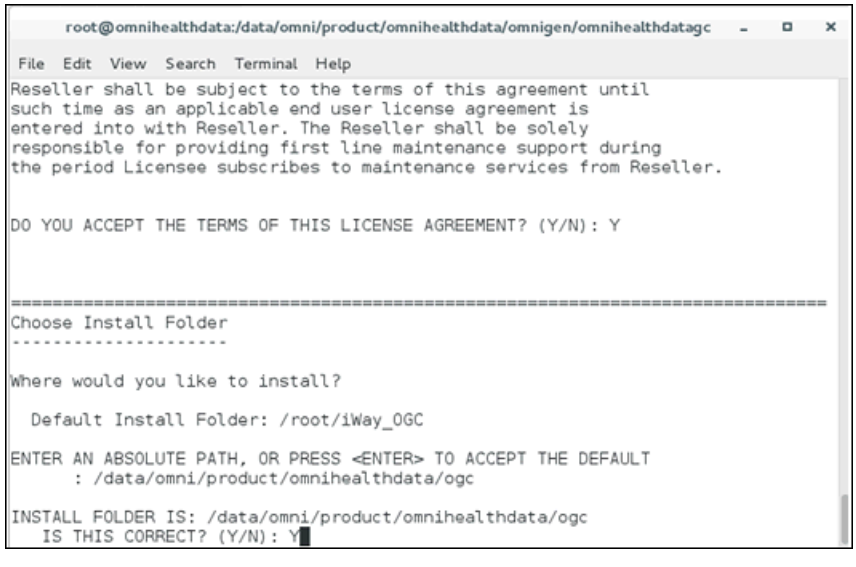
5. Read the terms of the license agreement and continue to press *Enter* until you reach the last section of the license agreement.
6. Enter *Y* to accept the terms of the license agreement and then and press *Enter* to continue.

The Choose Install Folder pane opens, as shown in the following image.



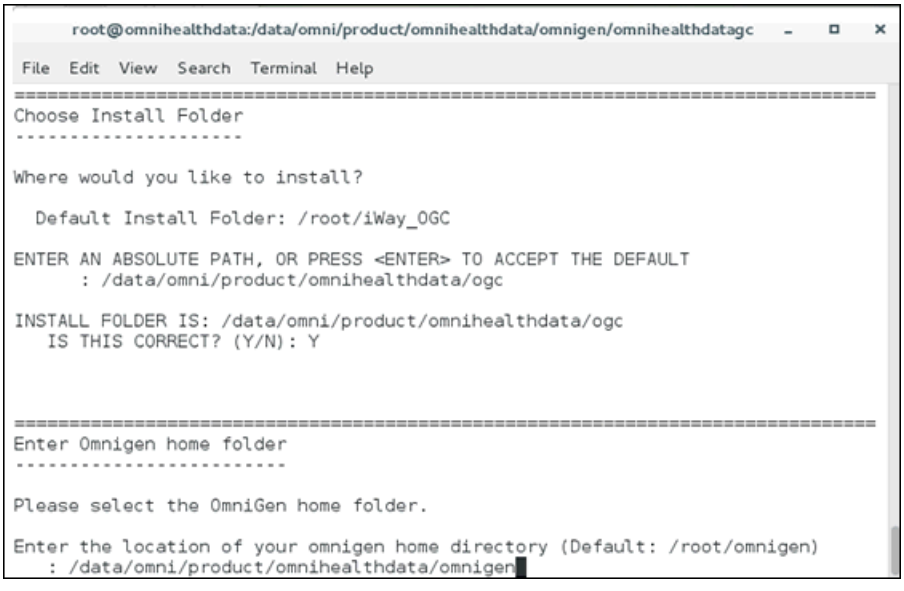
7. Enter the desired installation location (for example, */data/omni/product/omnihealthdata/ohdgc*), and then press *Enter* to continue.

   A prompt to confirm the path is displayed, as shown in the following image.



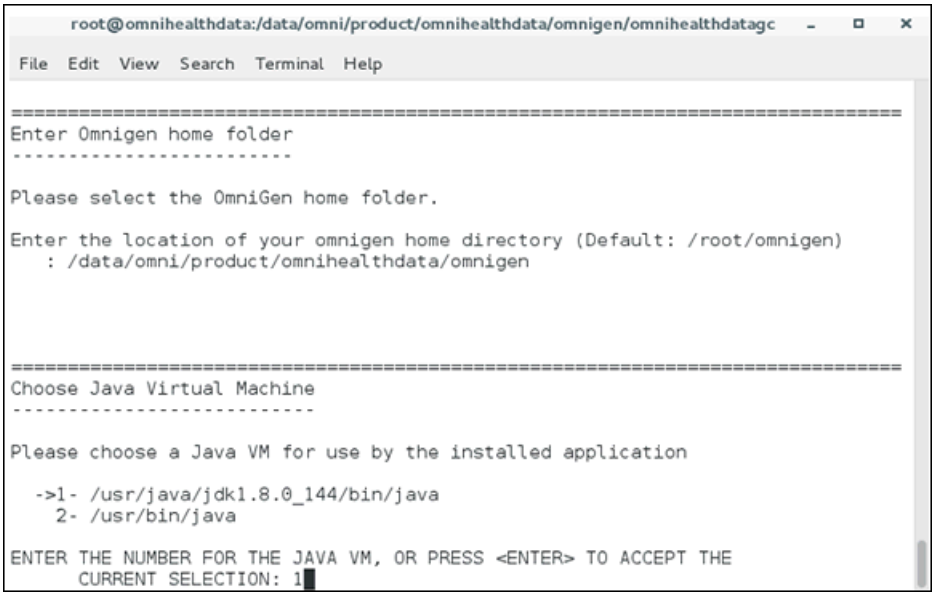
8. Select *Y* to confirm and then press *Enter* to continue.

The Enter Omnigen home folder pane opens, as shown in the following image.



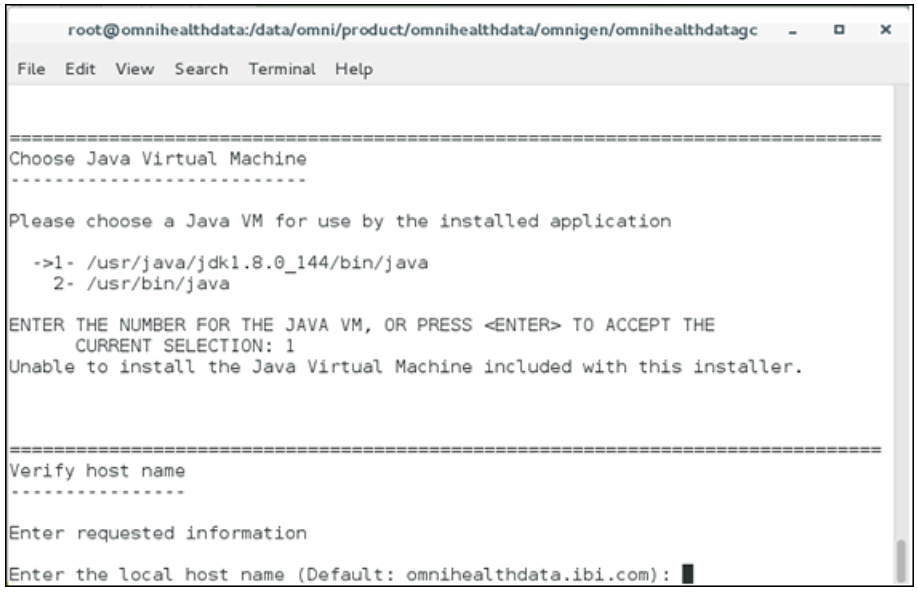
9. Enter the location of your *omnigen* home directory (for example, */data/omni/product/omnihealthdata/omnigen*), and then press *Enter* to continue.

   The Choose Java Virtual Machine pane opens, as shown in the following image.



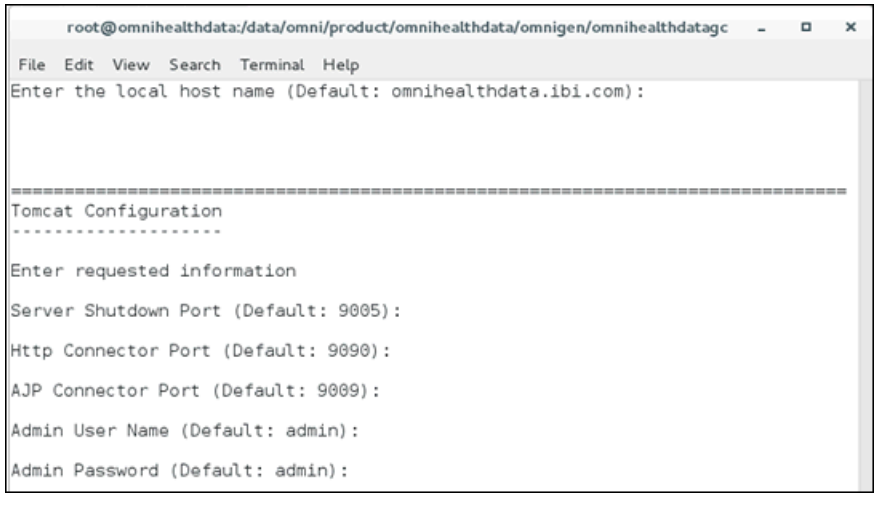
10. Ensure that the Java version located is version 1.8 or higher, and then press *Enter* to continue.

    The Verify host name pane opens, as shown in the following image.



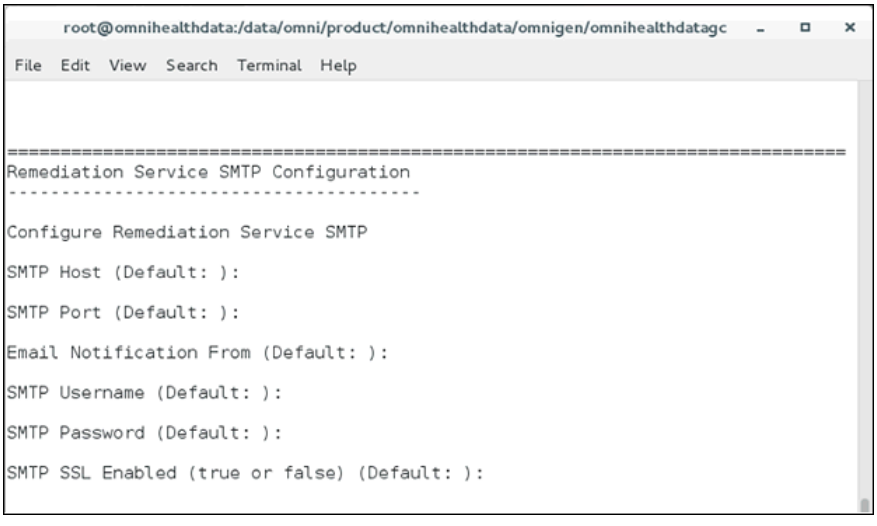
11. Change the local host name or accept the default value specified in the *og_configuration_update.properties* file, and then press *Enter* to continue.

    The Tomcat Configuration pane opens, as shown in the following image.



12. Verify the default ports, user name, and password, or modify the parameters accordingly, and then press *Enter* to continue.

    The Remediation Service SMTP Configuration pane opens, as shown in the following image.



13. Leave the parameter values blank unless you are adding an email option.

    a. To enable the email option, provide values for the following parameters as they apply to your SMTP email server:

    - **SMTP Host.** Host name of your SMTP server (for example, *smtp.ibi.com*).
    - **SMTP Port.** SMTP port on that server (usually port 25).
    - **Email Notification From.** Email address from which the assignment emails will originate (for example, *OmniGen_Remediation@ibi.com*).
    - **SMTP Username.** User name for accessing the email server.
    - **SMTP Password.** Password associated with the user name for accessing the email server.
    - **SMTP SSL Enabled (true or false).** Specify *true* if your email server supports or requires SSL authentication.

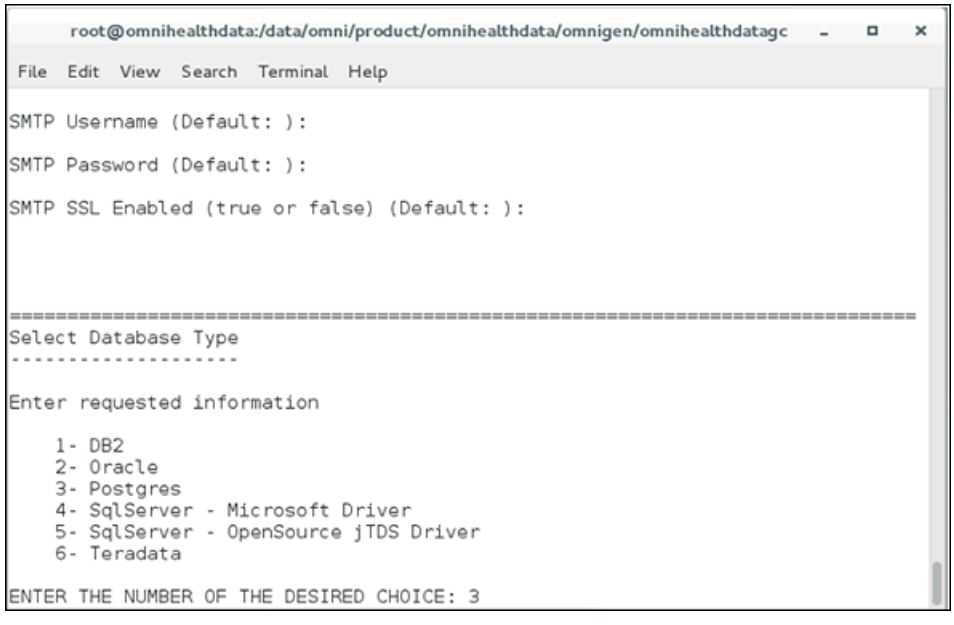
    b. Press *Enter* to continue.

In addition, each user who will receive email notifications must have a valid email address in their WSO2 Identity Server (WSO2 IS) user profile.

- Each LDAP user with the *Data Steward* or *Data Supervisor* role, and who will receive Assignment emails, must have a valid email address in their Active Directory profile. When it makes the LDAP connection, WSO2 IS will bring back those email addresses to its *Local User Store* profile of the user.
- Each hardcoded user in the WSO2 IS *Primary* domain must have an email in their WSO2 IS user profile.

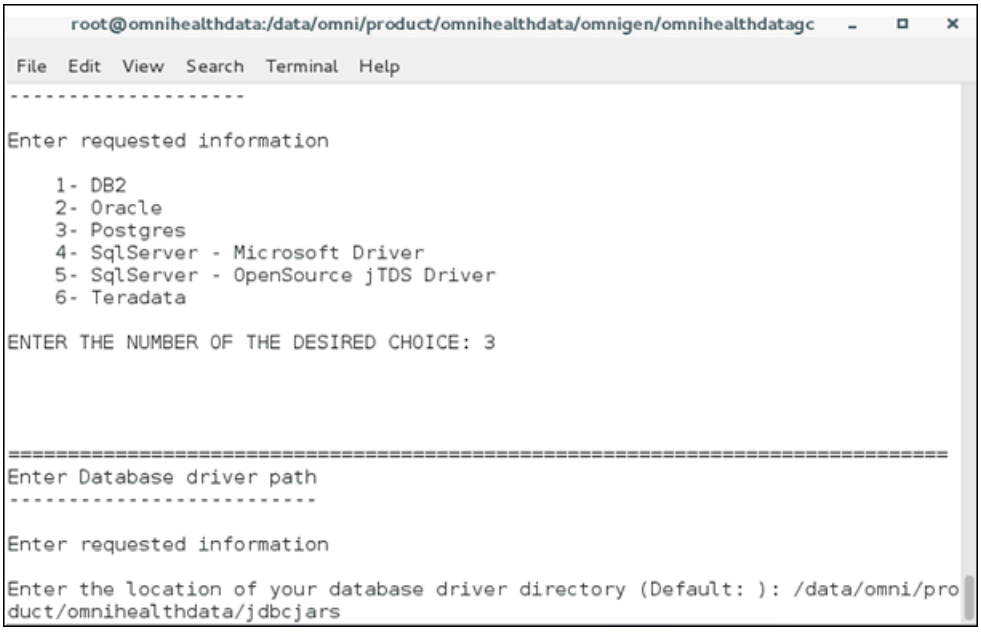
14. Press *Enter* to continue.

    The Select Database Type pane opens, as shown in the following image.



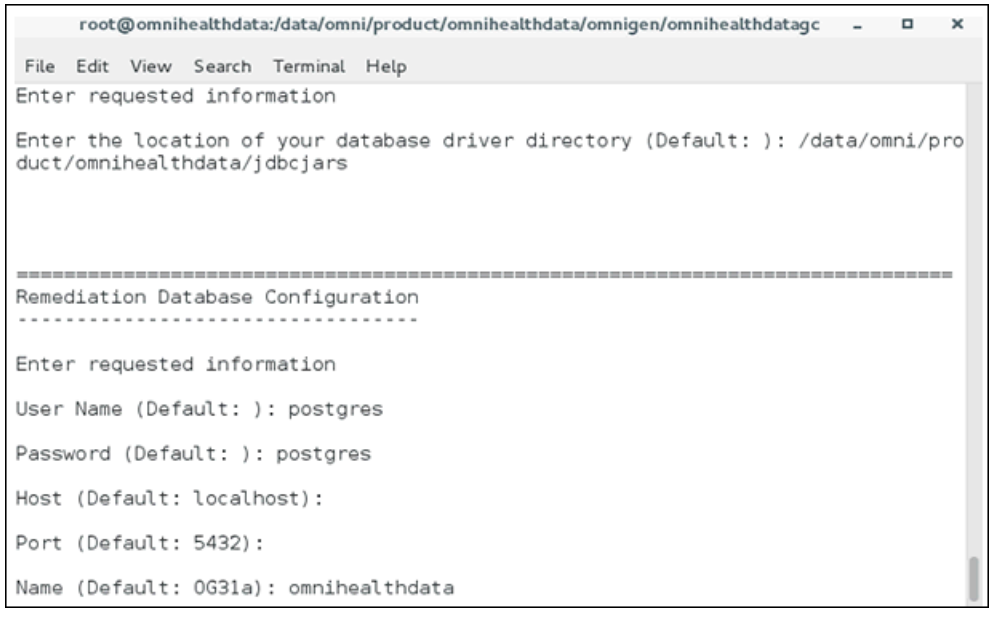
15. Select the appropriate database type, and then press *Enter*.

The Enter Database driver path pane opens, as shown in the following image.



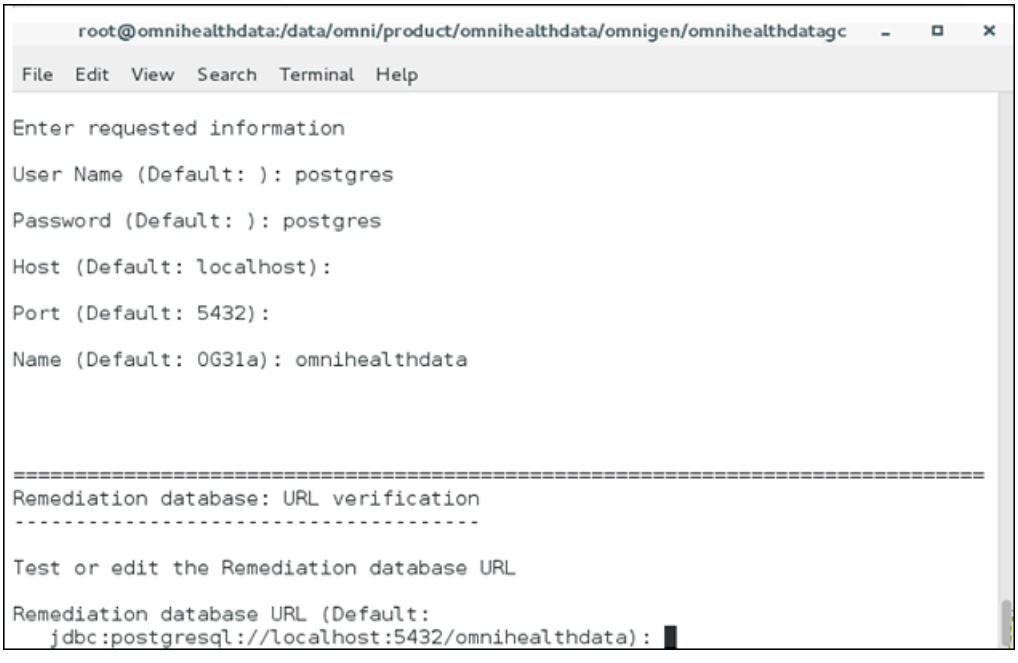
16. Specify the location of your JDBC .jar file(s) and then press *Enter*.

The Remediation Database Configuration pane opens, as shown in the following image.



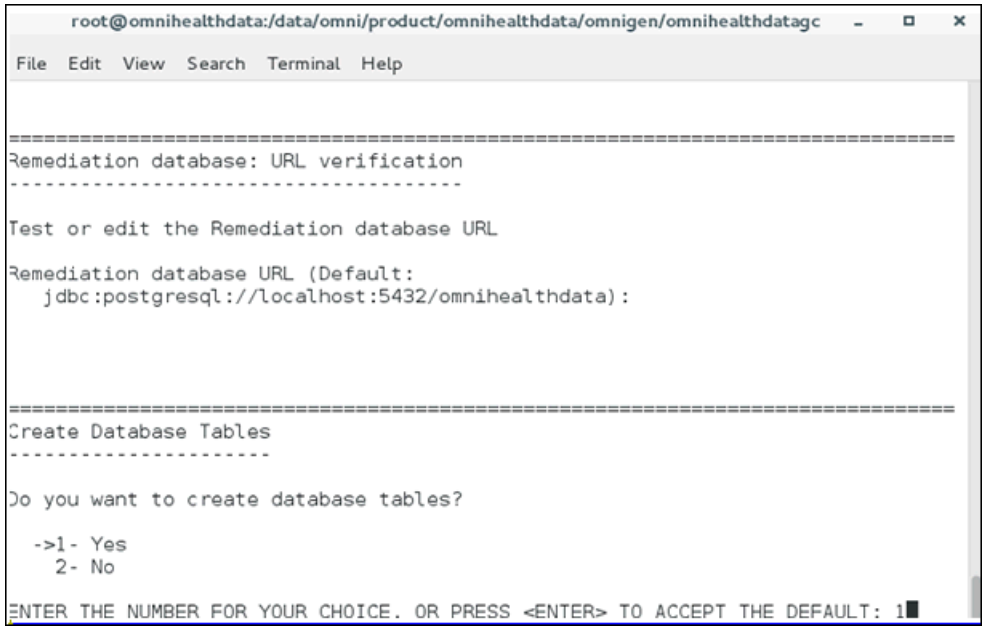
17. Ensure that the Name parameter points to your omnihealthdata database connection.

The Remediation database: URL Verification pane opens, as shown in the following image.



18. Press *Enter* to continue.

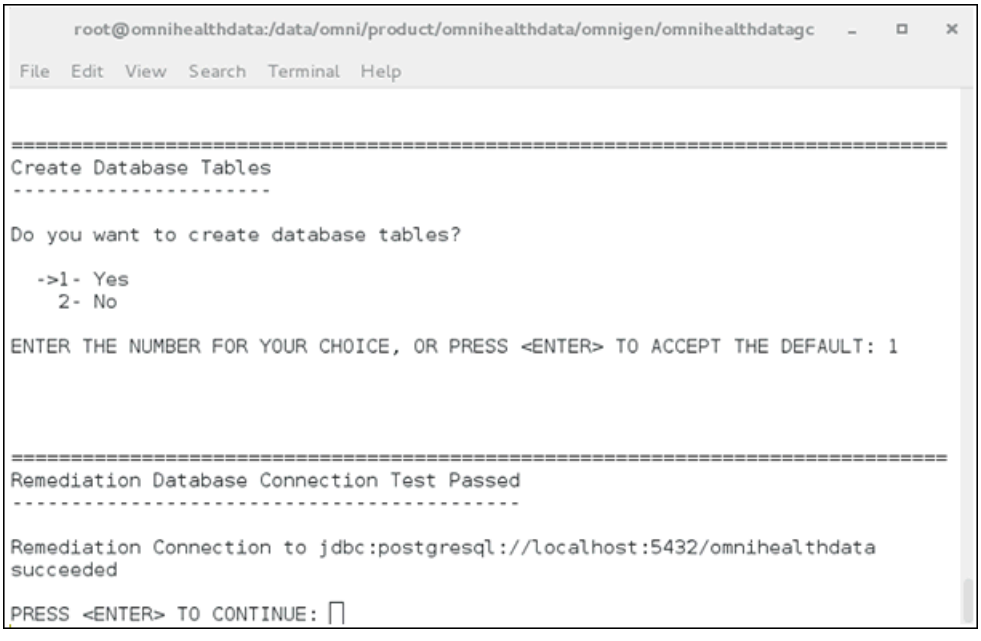
The Create Database Tables pane opens, as shown in the following image.



19. Specify *No* to create the tables for the Remediation database, and then press *Enter* to continue.

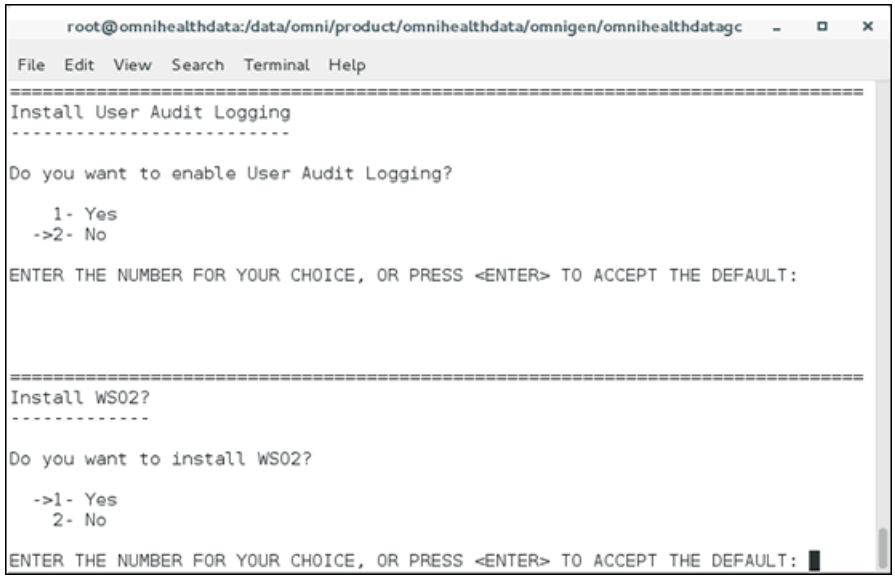
    Note: It is extremely important that you select *No* so that your existing database is preserved.

The following image shows test connection results for the specified database.



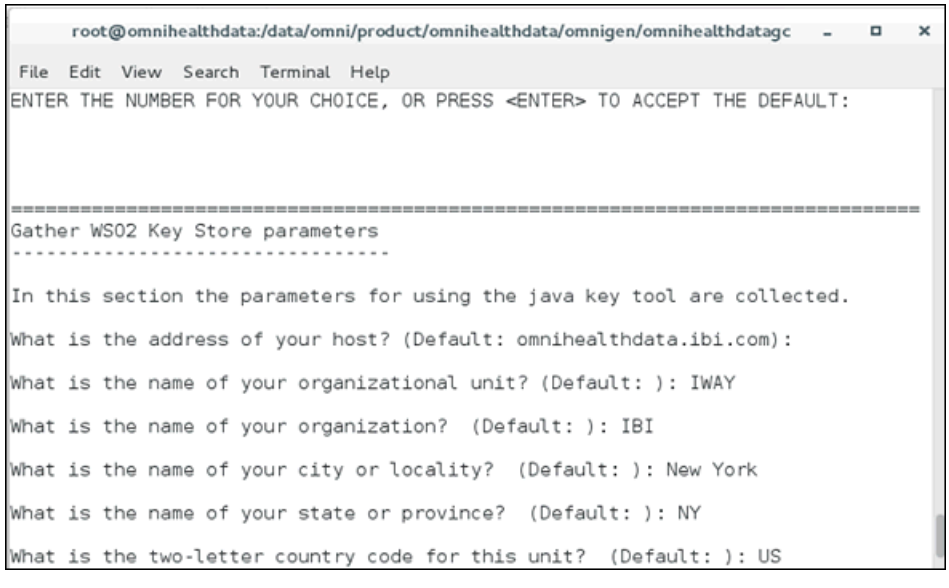
20. Press *Enter* to continue.

The Install User Audit Logging and Install WSO2 pane opens, as shown in the following image.



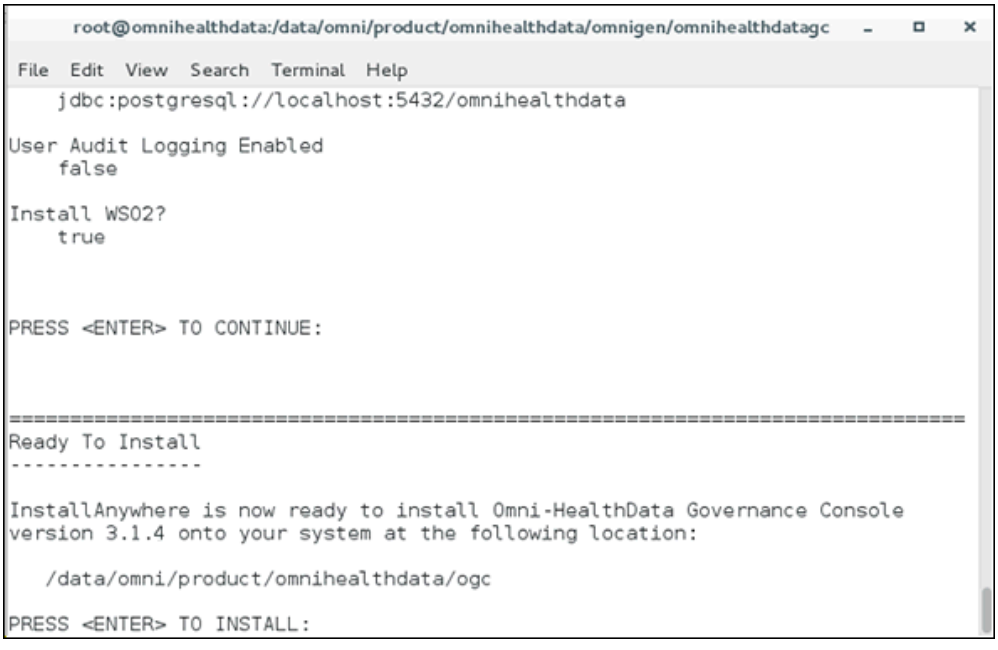
21. Specify *2 - No* where prompted to install User Audit Logging, *1 - Yes* where prompted to install WSO2, and then press *Enter* to continue.

    The Gather WSO2 Key Store parameters pane opens, as shown in the following image.



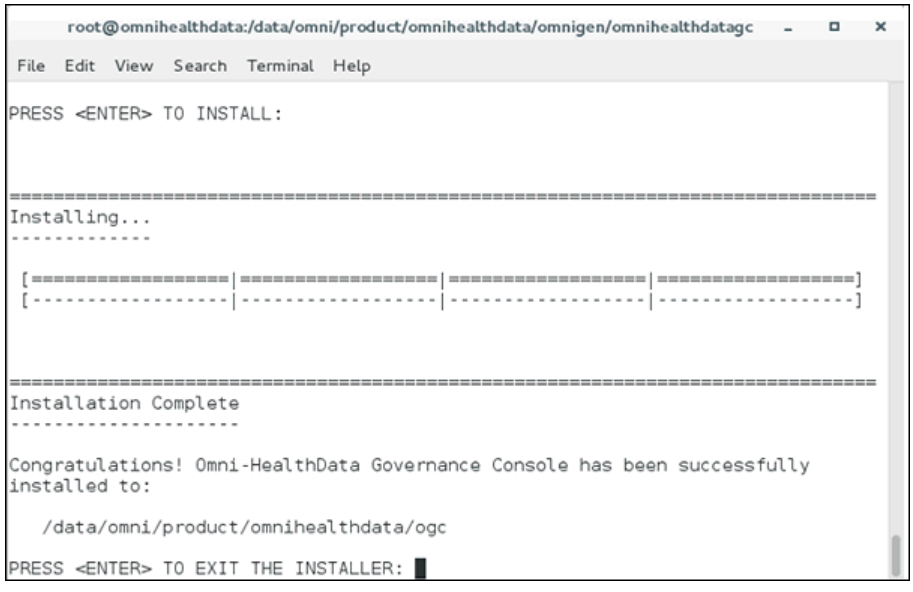
22. Verify the default for the address of the host, populate appropriate entries for the other prompts, and then press *Enter* to continue.

    The Ready To Install pane opens, as shown in the following image.



23. Press *Enter* to begin the installation.

Allow the process to complete, at which point, the Installation Complete pane will be displayed, as shown in the following image.



24. Press *Enter* to exit OHDGC installer.

Deploying Your Current Production Bundle on the Upgraded Omni Server

This section describes how to deploy your current production bundle on the upgraded Omni Server.

Procedure: How to Deploy Your Current Production Bundle on the Upgraded Omni Server

1. Navigate to the *OmniServer* home directory.

   For example:

   `/data/omni/product/omnihealthdata/omnigen/OmniServer`

2. Enter the following command to stop the controller:

   `./omni.sh start-controller`

3. Using your browser, open the Omni Console by entering the following URL:

   `https://yourhost.yourdomain.com:9500`

   For example:

   `https://omnihealthdata.ibi.com:9500`

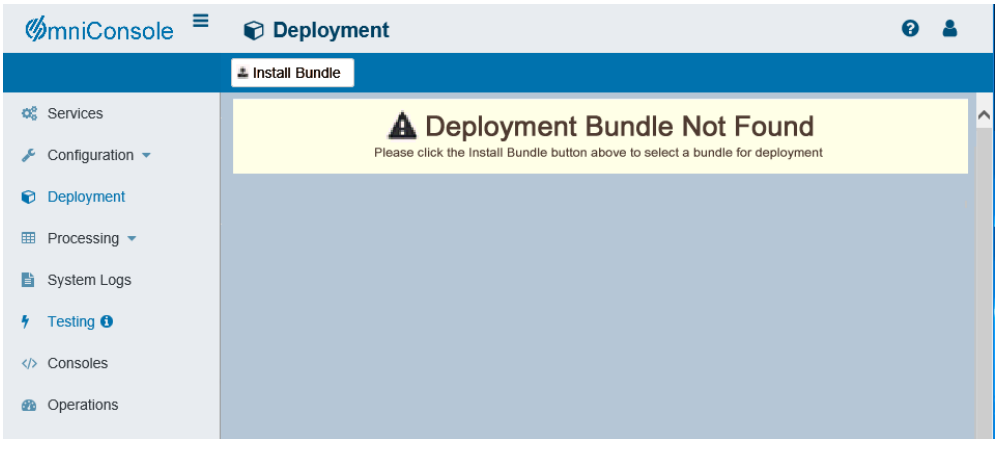
Note: You cannot use *localhost* in the URL. You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

4. Log on using the following credentials:

   - Username: **ibi**
   - Password: **ibi**

5. Deploy the bundle by clicking *Deployment* in the left pane.

   The Deployment pane opens, with the message *Deployment Bundle Not found*, as shown in the following image.

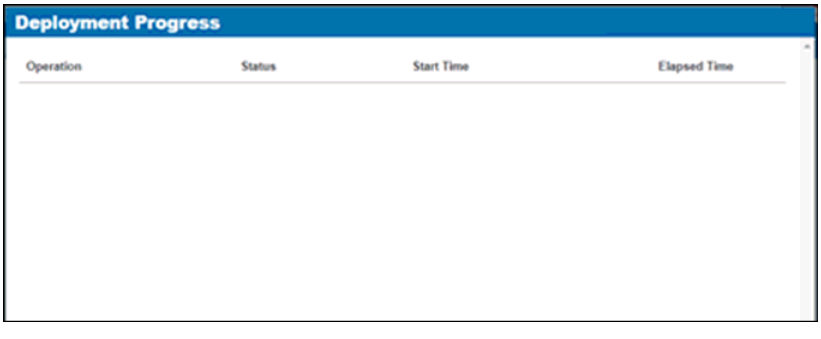


6. Click *Install Bundle*.

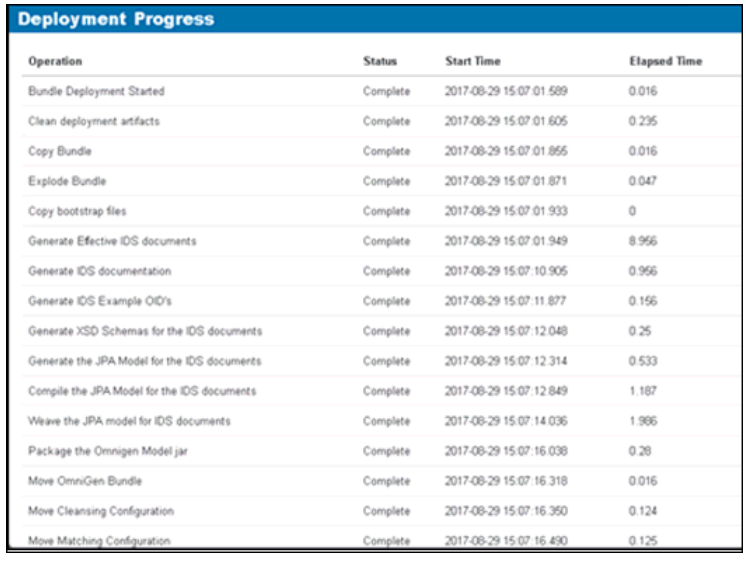
   The Open dialog box is displayed.

7. Navigate to the location of your current production deployment bundle file.
8. Select your current production deployment bundle file and click *Open*.

   A blank Deployment Progress window opens, as shown in the following image.



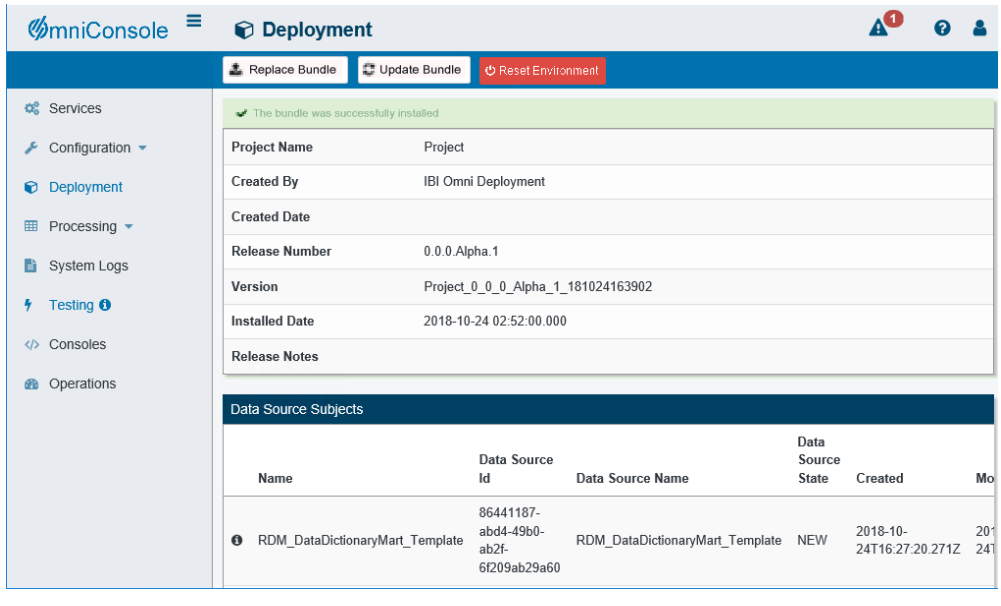
The Deployment Progress window will start to display information and progress during the whole deployment process, as shown in the following image.



Deployment Progress

Operation	Status	Start Time	Elapsed Time
Bundle Deployment Started	Complete	2017-08-29 15:07:01.589	0.016
Clean deployment artifacts	Complete	2017-08-29 15:07:01.605	0.235
Copy Bundle	Complete	2017-08-29 15:07:01.855	0.016
Explode Bundle	Complete	2017-08-29 15:07:01.871	0.047
Copy bootstrap files	Complete	2017-08-29 15:07:01.933	0
Generate Effective IDS documents	Complete	2017-08-29 15:07:01.949	8.956
Generate IDS documentation	Complete	2017-08-29 15:07:10.905	0.956
Generate IDS Example OID's	Complete	2017-08-29 15:07:11.877	0.156
Generate XSD Schemas for the IDS documents	Complete	2017-08-29 15:07:12.048	0.25
Generate the JPA Model for the IDS documents	Complete	2017-08-29 15:07:12.314	0.533
Compile the JPA Model for the IDS documents	Complete	2017-08-29 15:07:12.849	1.187
Weave the JPA model for IDS documents	Complete	2017-08-29 15:07:14.036	1.986
Package the Omnigen Model jar	Complete	2017-08-29 15:07:16.038	0.28
Move OmniGen Bundle	Complete	2017-08-29 15:07:16.318	0.016
Move Cleansing Configuration	Complete	2017-08-29 15:07:16.350	0.124
Move Matching Configuration	Complete	2017-08-29 15:07:16.490	0.125

When the process is completed, a *successfully installed* message is displayed, as shown in the following image.



Upgrading Your Current Production Bundle

This section describes how to upgrade your current production bundle with the changes that are supplied with your upgrade.

Procedure: How to Upgrade Your Current Production Bundle

1. Navigate to the location of the default deployment bundle file that ships with your upgrade.

   The default bundle can be found in the *omnihealthdatabundle* folder under your *omnigen* home directory. For example:

   ```
   \data\omni\product\omnihealthdata\omnigen\omnihealthdatabundle
   ```

2. Save the default bundle to the location where you manage your deployment bundles.
3. Replace the mastering folder in the default bundle with the mastering folder from your current production bundle.
4. Save the bundle according to your naming conventions as your upgraded production bundle.

Procedure: How to Deploy Your Upgraded Production Bundle

1. Navigate to the *omniserver* home directory.

   For example:

   ```
   /data/omni/product/omnihealthdata/omnigen/OmniServer
   ```

2. Type the following command to stop the controller:

   ```
   ./omni.sh stop-controller
   ```

3. Run the following command, setting the server back to your production configuration:

   ```
   ./omnigen.sh configure -Dconfiguration.properties=/data/omni/product/
   omnihealthdata/properties/og_configuration.properties
   ```

4. Copy (backup) the following folders:

   ```
   /omnigen/OmniServer/bundle
   /omnigen/OmniServer/cmd
   /omnigen/OmniServer/dbms
   ```

5. Copy the permanent iWay Data Quality Server (DQS) licenses from backup to your new implementation.

   ```
   /omnigen/OmniServer/mastering/runtime/license_keys
   ```

6. Open a terminal window and enter the following command, then press *Enter*:

   ```
   ./omni.sh start-controller
   ```

Note: When installation has completed, a BUILD Successful message appears, but the startup process continues for a few minutes. You must wait for this process to complete before proceeding to the next step.

7. Using your browser, open the Omni Console by entering the following URL:

   `https://yourhost.yourdomain.com:9500`

   For example:

   `https://omnihealthdata.ibi.com:9500`

   Note: You cannot use *localhost* in the URL. You must use the appropriate protocol (HTTP or HTTPS) as specified in the *server.runtime.http-protocol* property of the *og_configuration.properties* file.

8. Log on using the following credentials:

   - Username: **ibi**
   - Password: **ibi**

9. Deploy the bundle by clicking *Deployment* in the left pane.

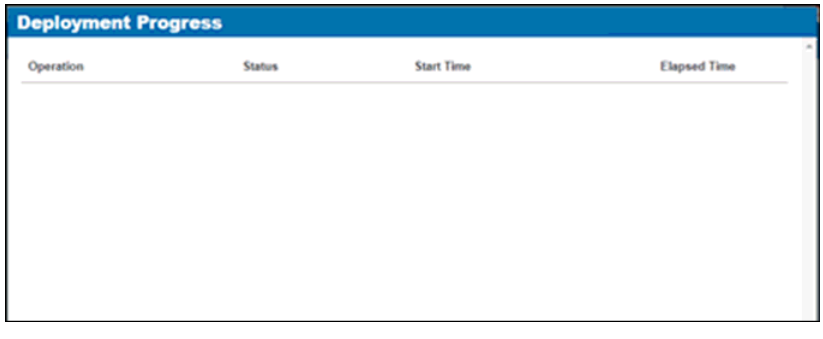
   The Deployment pane opens, with the *Update Bundle* option.

10. Click *Update Bundle*.

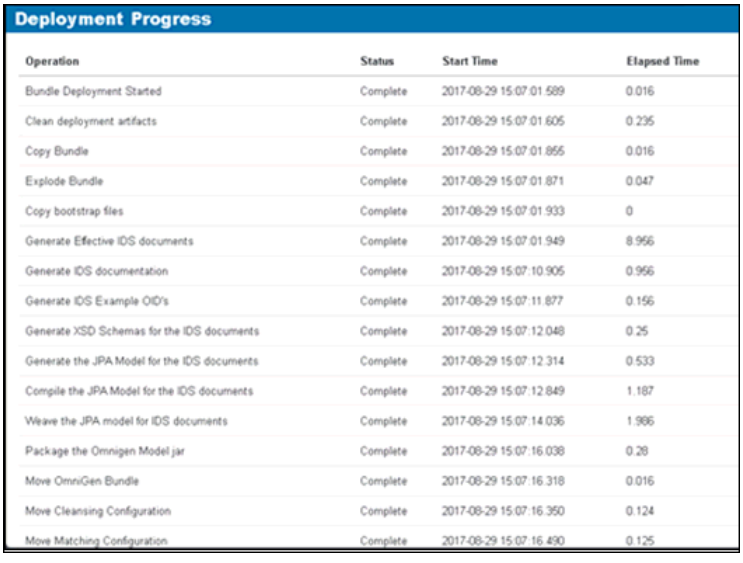
    The Open dialog box is displayed.

11. Navigate to the location of your upgraded production deployment bundle file.
12. Select your deployment bundle file and click *Open*.

    A blank Deployment Progress window opens, as shown in the following image.



The Deployment Progress window will start to display information and progress during the whole deployment process, as shown in the following image.



Deployment Progress

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Bundle Deployment Started	Complete	2017-08-29 15:07:01.589	0.016
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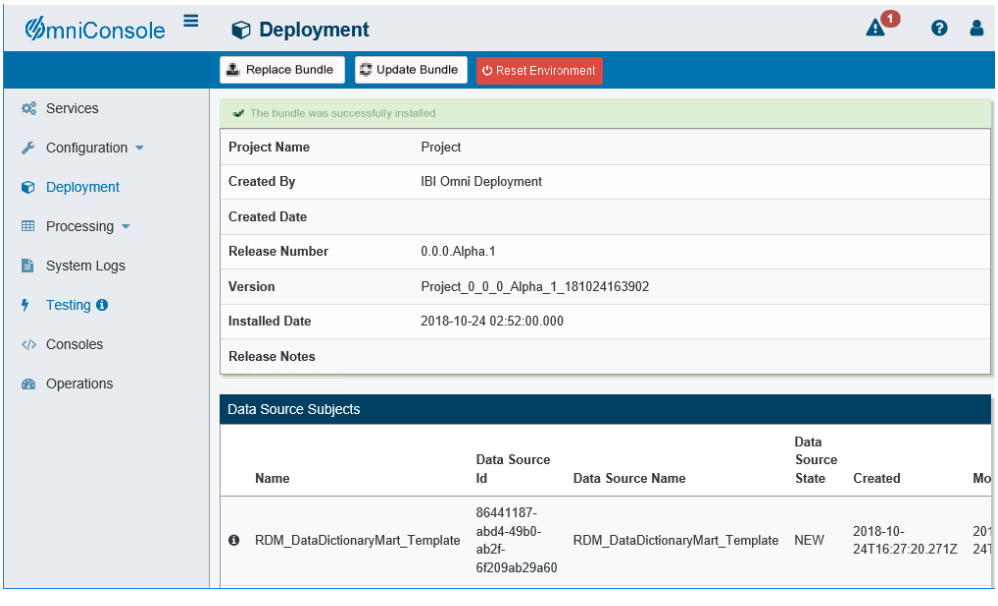
Move Cleansing Configuration	Complete	2017-08-29 15:07:16.350	0.124
Move Matching Configuration	Complete	2017-08-29 15:07:16.490	0.125

When the process is completed, a *successfully installed* message is displayed, as shown in the following image.



13. After starting the Matching service for the first time, you must navigate to the `repos_<subject>_wgid` and `repos_<subject>_wpk` tables in the *omnirepo* database, and drop their corresponding indexes, as they are not required and will impact performance:

    - `repos_<subject>_wgid_ix0`
    - `repos_<subject>_wpk_ix0`

Reinitializing Your WSO2 Identity Server Configuration

This section describes how to reinitialize your WSO2 Identity Server configuration.

Procedure: How to Reinitialize Your WSO2 Configuration

1. Navigate to the following directory:

   `/data/omni/product/omnihealthdata/ohdgc/ogc/bin/tools`

2. Replace the following wso2_is folder with your backup copy of the wso2_is folder:

   `/data/omni/product/omnihealthdata/ohdgc/ogc/bin/tools/wso2_is`

Reinitializing Your MData in Omni-HealthData Governance Console

This section describes how to reinitialize your MData in Omni-HealthData Governance Console (OHDGC).

Procedure: How to Reinitialize Your MData in OHDGC

To reinitialize your MData in OHDGC:

1. Navigate to the following directory:

   `/data/omni/product/omnihealthdata/ohdgc/ogc/bin/ibi`

2. Enter the following command in a terminal window, and press *Enter*:

   `./ogcstart.sh`

3. Log on to Omni-HealthData Governance Console (OHDGC) and load the metadata using your browser.

   For example:

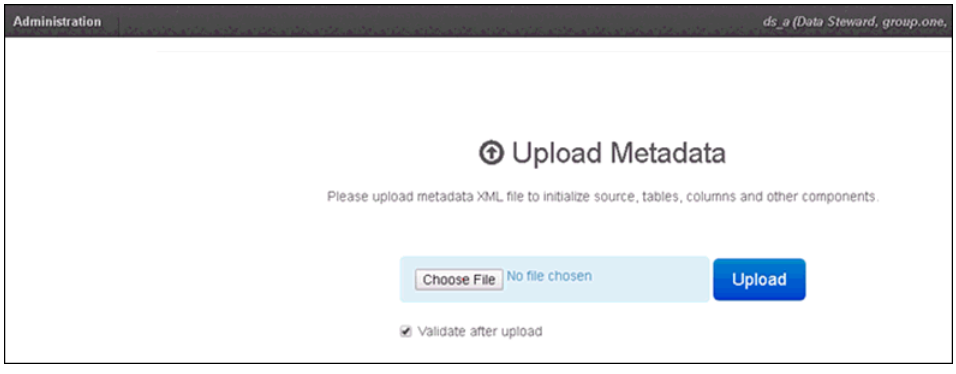
   `http://omnihealthdata.ibi.com:9090/ogc`

4. Log on using the preauthorized WSO2 Identity Server local (Primary) credentials, which can be used to perform other startup actions until site-specific credentials and permissions are added.

For example:

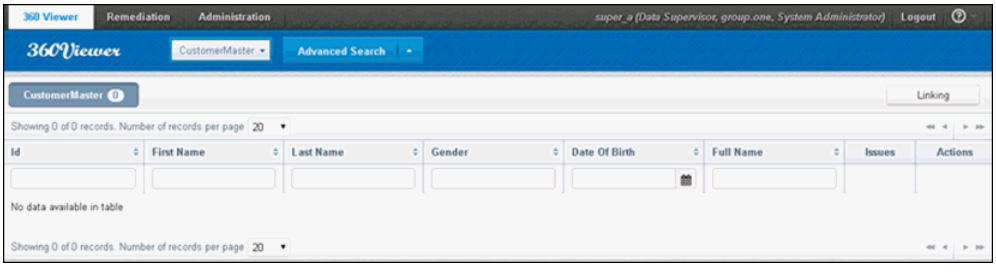
- Username: **primary/super_a**
- Password: **supera123**

The Upload Metadata pane opens, as shown in the following image.



5. Click *Choose File* and navigate to the folder where your backed up MData was saved.
6. Select the <*Saved_MData*>*.xml* file.
7. Ensure that the *Validate after upload* check box is selected, then click *Upload*.

OHDGC opens and displays the 360 Viewer page, as shown in the following image.



Omni Server and OHDGC are now upgraded and ready for use.

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Information Builders

iWay

Omni-HealthData™ Upgrade Guide

Version 3.1

DN3502344.1118

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