HCL Compass

Guide for upgrading from previous versions of HCL Compass to HCL Compass v2.0.2 and later

Contents

Upgrading from previous HCL Compass versions to HCL Compass v2.0.2 and later

This guide provides the information about how to upgrade from HCL Compass v2.0.0 and v2.0.1 to HCL Compass v2.0.2 and later.

Compass can be installed on Windows and Linux platforms on x86_64 hardware. See the System Requirements document for a list of the operating systems supported by Compass versions.

Prerequisites

- You will need to uninstall previous versions of HCL Compass before installing a new version of the HCL Compass.
- You have the software and followed the instructions in the software order acknowledgment letter for accessing the License & Delivery portal and activating your entitlements. The letter describes how to create a license server and how to add entitlements to it.
- Java version 1.8 or later is installed, and the Java PATH environment variable is set.
  For more details, see the "Hardware, software, and database requirements" and "Reconfiguring Compass to use a different JRE" topics in the local Help.
- IBM Installation Manager version 1.8.2 or later is installed.
- If you are installing Compass on Linux and your database is on MS SQL server, you must first install the Microsoft ODBC driver for SQL server otherwise your database connection profiles will not be preserved, and you will have to reestablish them. See https://docs.microsoft.com/en-us/sql/connect/odbc/linux-mac/installing-the-microsoft-odbc-driver-for-sql-server?view=sql-server-ver15 for instructions on installing the driver.

  Important: Compass v2.0.0 or v2.0.1 cannot be installed on the same system with Compass 2.0.2 and later.

Uninstall previous versions of HCL Compass

See the HCL Compass Help for instructions about how to install or uninstall the HCL Compass product. The Compass 2.0.3 Help is published on https://help.hcltechsw.com/compass/latest.html.

Install HCL Compass

1. Download and review the System Requirements document.
2. Download your HCL product and extract the image on your computer.
   You must provide to IBM Installation Manager the location of each extracted download.
3. Use IBM Installation Manager and the instructions in its help to install one or more HCL products. See the online help about using IBM Installation Manager to install the product.
4. Start the HCL product.

> **Note: During the Compass install, if you want to re-use your existing ClearQuest settings, such as your ClearQuest DB connections, select the "Use Preserved Settings" option from the Installation Manager.**

- If you need to install Compass Multisite Shipping server, starting with Compass 2.0.2, the Compass Multisite shipping server is installed separately using a separate Installation Manager offering because it is no longer part of the HCL Compass install. If you want to install the Multisite shipping server, you need to use a separate Installation Manager offering. A valid installation of Compass must exist or should be installed alongside this new offering.
  If VersionVault or ClearCase is already present on the machine, the Multisite extension cannot be installed.
  Installing the Compass Multisite Extension v2.0.2 and later version offering is equivalent to installing the previous Multisite Shipping Server feature on Compass or ClearQuest.

Note: For HCL Compass MultiSite v2.0.2, from the Installation Manager, install the HCL Compass Multisite Shipping Server Extension -Windows 64bit Version 2.0.1.01.

- For additional configuration steps for Microsoft SQL Server support on Linux for HCL Compass 2.x, see the HCL article on https://support.hcltechsw.com/csm?id=kb_article&sysparm_article=KB0091709.

Post install instructions

> **Attention**: **To avoid odd or unexplained behaviors, we recommend clearing your browser cache before opening the Compass Web for the first time.**

Incompatible behavior

The following changes exist in this release:

HCL Compass Client version check

If using the client version, check the feature to restrict access to a ClearQuest database. The allowed version numbers will need to be changed to allow Compass to access that same database.
The current value of the ALLOWED_CLIENT_VERSIONS master or schema property that are named will need to be updated to add a value for Compass. The new version must have a "Compass:" prefix that will identify it as applying only to Compass. For example, suppose access is currently restricted to ClearQuest 9.0.1 with a value of "9.0.1" in the property. To allow both ClearQuest and Compass to access the database, the new property value would need to be changed to "9.0.1 Compass:2.0.2". For instructions about how to set the property values, see the technote 21632013.

HCL Compass FTS support

Before uninstalling IBM ClearQuest, use the FTS command-line option of **prep_upgd_was_profiles** to create a backup of all your full-text search WebSphere Application Server profile data on the server, and delete the profiles. After installing Compass, use the **restore_was_profiles** command to restore the profiles. Once you restore your FTS with Compass, your FTS settings and functionality will continue to work as they used to work in ClearQuest.

For more details, see the "Upgrading or reinstalling Compass in a full-text search deployment with multiple WebSphere profiles" topic in the HCL Compass Help.

ClearQuest Web settings migration

The "Settings" option that you had under IBM ClearQuest Web "Site Administration" options are not going to be preserved when you upgrade to HCL Compass Web. You need to record those settings and re-enter them after installing HCL Compass v2.0.2 and later versions.

The same also applies to the "Settings" option under "Preferences".

Single Sign-On

If you have configured Single Sign-On with ClearQuest, you will need to reconfigure it for Compass. You can use the same configuration files and script as used to set up SSO with ClearQuest. Some modifications to the configuration files may be needed to account for your new installation directories. If you require a new version of the configuration script, or additional guidance to reconfigure Single Sign-On, contact HCL Support.

cq_setup.csh and cq_setup.sh

Migrating from IBM ClearQuest to HCL Compass does not preserve the cq_setup.csh and cq_setup.sh scripts. The scripts will be regenerated during install. Any customized scripts from a previous version will still be available in the Rational.preserve directory and you need to update the scripts, so they point to the correct binaries for Compass.

Recreate your MultiSite shipping server settings

If you are using IBM Rational ClearQuest MultiSite, you must process all packets in your shipping bays before migrating to HCL Compass. During this processing, other replica sites must pause sending new packets to the host being migrated. The uninstallation handles custom storage classes differently on Windows and Linux, see the following discussion of each platform. Note the following:

- You must select the **Use preserved settings** option when installing Compass.
- In addition, after you install Compass, you must recreate your customized MultiSite shipping server settings (for instance, the path to the receipt-handler, if you are using one).

On **Windows**, the default shipping bays and custom shipping are copied to the Rational.preserve folder during uninstallation. The installation will modify the value of the `HKEY_LOCAL_MACHINE\ SOFTWARE\WOW6432Node\Atria\ClearCase\CurrentVersion\MultiSite\StorageC lass\-default` Windows registry keys `ReturnBay` and `StorageBay` with the correct paths to those bays in the Compass installation directory. However, it will not update the Windows registry keys for custom storage classes. It will recreate any custom shipping bays you might have had and will move the contents from Rational.preserve to the new default and custom bays. When you are migrating from IBM Rational ClearQuest to HCL Compass, you must discard these old packets and shipping orders and regenerate them. Use the MultiSite control panel applet to update the shipping bay paths for custom storage classes.

On **Linux**, only the default bay is copied to the Rational.preserve folder during uninstallation. Any non-empty directory trees for custom storage classes under `/opt/ibm/RationalSDLC/clearcase` will remain in the partial directory tree of the previous

installation, as will the shipping.conf file. If the custom shipping bays are empty, the uninstallation process will remove them. On the installation of Compass, the preserved contents of the default shipping bays are copied to the new bays. When you are migrating from IBM Rational ClearQuest to HCL Compass, you must discard these old packets and shipping_orders and regenerate them. You will need to recreate the shipping bay directory structure and update the shipping.conf file for custom storage classes.

Support

For technical support, contact HCL Customer Support at https://www.hcltech.com/products-and-platforms/support and in addition to providing details for your issue, also provide the following information:

- Your name, company name, telephone number, and email address
- Your operating system, version number, and any applied service packs or patches
- Product name and release number
- Your Support Ticket Number (if you are following up on a previously reported problem)

For blogs, forums, and more for Compass, go to the HCLSoftware website at https://www.hcltechsw.com/wps/portal.

References

- The following table shows a list of the equivalent file paths for HCL Compass on Windows platform.

HCL Compass v2.0.0 or v2.0.1	HCL Compass v2.0.2 and later
C:\Program Files\HCL\CCM	C:\Program Files\HCL\Compass
C:\Program Files\HCL\CCM\Compass	C:\Program Files\HCL\Compass
C:\Program Files\HCL\CCM\Common	C:\Program Files\HCL\Compass

- The following table shows a list of the equivalent file paths for HCL Compass on Linux platform.

HCL Compass v2.0.0 or v2.0.1	HCL Compass v2.0.2 and later
/opt/hcl/ccm	/opt/hcl/compass
/opt/hcl/ccm/compass	/opt/hcl/compass
/opt/hcl/ccm/common	/opt/hcl/compass

- The following table shows the Installation Manager panel values for silent installation where %PLATFORM% should be replaced with win_x86_64 or linux_x86_64 based on current operation system.

Previous values	New values
<data key='user.CCM_FNE_CloudOrLocal' value=''/>	<data key='user.CQ_FNE_CloudOrLocal,com.hcl.compass.compass.%PLATFORM%' value=''/>
<data key='user.CCM_FNE_LicenseServerURL' value=''/>	<data key='user.CQ_FNE_LicenseServerURL,com.hcl.compass.compass.%PLATFORM%' value=''/>
<data key='user.CCM_FNE_LicenseServerID' value=''/>	<data key='user.CQ_FNE_LicenseServerID,com.hcl.compass.compass.%PLATFORM%' value=''/>

`<data key='user.CCM_JavaBinDir' value=''/>`	`<data key='user.CQ_JavaBinDir,com.hcl.compass.compass.%PLATFORM%' value=''/>`
`<data key='user.IHS_WebServId' value=''/>`	`<data key='user.CQ_IHS_WebServId,com.hcl.compass.compass.%PLATFORM%' value=''/>`
`<data key='user.IHS_PluginPath' value=''/>`	`<data key='user.CQ_IHS_PluginPath,com.hcl.compass.compass.%PLATFORM%' value=''/>`
`<data key='user.IHS_ConfFile' value=''/>`	`<data key='user.CQ_IHS_ConfFile,com.hcl.compass.compass.%PLATFORM%' value=''/>`
`<data key='user.IHS_ConfScriptRoot' value=''/>`	`<data key='user.CQ_IHS_ConfScriptRoot,com.hcl.compass.compass.%PLATFORM%' value=''/>`
`<data key='user.IHS_ServerRoot' value='/>`	`<data key='user.CQ_IHS_ServerRoot,com.hcl.compass.compass.%PLATFORM%' value='/>`
`<data key='user.IHS_Configuration' value=''/>`	`<data key='user.CQ_IHS_Configuration,com.hcl.compass.compass.%PLATFORM%' value=''/>`
`<data key='user.KEEP_RATIONAL_PRESERVE_FOLDER' value=''/>`	`<data key='user.CQ_KEEP_RATIONAL_PRESERVE_FOLDER,com.hcl.compass.compass.%PLATFORM%' value='false'/>`
`<data key='user.Common_AdminDir' value=''/>`	`<data key='user.Common_AdminDir,com.hcl.compass.compass.%PLATFORM%' value=''/>`
`<data key='user.Common_TempDir' value=''/>`	`<data key='user.Common_TempDir,com.hcl.compass.compass.%PLATFORM%' value=''/>`