

# MYOB Greentree

Jade 2020 Upgrade Instructions

July 2022



# Contents

Introduction	3
Upgrade steps summary	4
Preparation	5
Restoring and certifying	6
Performing repairs	9
Applying the package	11
New client files	13
Compacting the database	14

# Introduction

The 2022.3.0 release of Greentree upgrades its Jade platform from Jade 2018 to Jade 2020.

This document explains how to upgrade Greentree systems to the Jade 2020 version, which is critical to the security of your data and information system capability. The process is the same as when you upgrade to any other Greentree release, but with the additional step of distributing a new DLL to the web server.

**Note:** A special requirement for this release is that you check and if necessary change the system's INI file to work around a Jade issue that can cause upgrades to fail. See the instructions under Applying the package.

No new version of the Visual C++ Redistributables is required.

Supporting material can be found in Jade and MYOB documentation.

## For more information

- For information on the Jade 2020 release, see the [Jade Software website](#).
- For general Greentree help, see the [online help](#) or the [deployment documentation](#).

## Document history

Version	Summary	Publication Date
1	Upgrade instructions for Greentree 2022.3.0	July 2022

# Upgrade steps summary

This section outlines the steps you'll need to take to upgrade to Jade 2020. All steps are described in more detail in subsequent sections.

## Preparation, rehearsal and certification

- Confirm that the production system is being backed up regularly.
- Obtain the materials you'll need and the machine you'll use to rehearse the upgrade.
- Restore a backup to the rehearsal machine.
- Run Jade logical and meta-certify analyses on the restored system, apply fixes to the restored system and the production system, restore from the next backup and repeat until you get a clean certification with no further fixes required.
- Apply the package to the restored system using the new version of Packman.exe.
- Confirm the system is functioning normally and passes user acceptance testing.
- Optionally compact database files on the restored system.

## Upgrading production

- Back up the production system.
- Shut down the system.
- Copy the new version of Packman.exe to the server's bin64 directory.
- Check and if necessary change the LogDirectory setting in the server's INI file.
- Apply the package.
- Push updated web resource files to web server.
- Copy the updated jadehttp files to the web server.
- Run the system in single-user mode and check a few essential functions.
- Start the system in multi-user mode and confirm you can connect remotely and perform basic operations.
- Confirm that you can use the updated 64-bit Jade ODBC driver on client machines.

## Support

In these scenarios, contact MYOB Greentree Support:

- Logical or meta-certification analysis shows a manual choice of fixes is required.
- Applying repairs fails.
- Applying the Greentree package fails.

# Preparation

Recent, reliable backups are essential to information system security. The broader topic is detailed in Jade's online help under the topic of [Recovery Concepts and Strategy](#).

For backup options and recommendations, see Backup Strategies in the [Greentree online help](#).

## Recommendations

- Don't store backups or rehearse upgrades or run test systems on your production server.
- Use *full* backups, not *quiesced* backups
- Identify the machine you will rehearse the upgrade on.
- Consider using the compressing option for backups. Although this increases the time it takes to back up and restore, it can also reduce how long it takes to copy files from the server to the rehearsal machine.

## Instructions

1. Confirm that the production system is being backed up regularly.
2. From the MYOB FTP site, download the myobgreentree.2022.3.0.package file.
3. From the MYOB FTP site, download version 6.0.0.0 of the Packman.exe file.

# Restoring and certifying

This section explains:

- how to restore a system from a backup
- why it's necessary to certify the Jade database, and how to do so.

Before you can upgrade to a new Jade version, you must certify the Jade database to make sure there are no errors.

The time it takes to perform certification depends on the size and complexity of the database. This time is a significant consideration for clients and partners. You can shorten the process by following the recommendations below, but **you must not bypass this step**.

Certification is performed by a Jade application running on the database. The JadeLogicalCertifier application provides two forms of certification: logical checks and meta-data checks. For each form there's an analysis step, and, if needed, a repair step. These checks are distinct from the physical certification provided by the Jade Database Utility called **jdbutil**.

**Note:** If errors are detected during certification, you need to perform the repair process described in the [Performing repairs](#) section, then repeat the analysis step. You must repeat this until the analysis step reports no errors.

There's only a small chance of a new error being introduced between certification and the upgrade, but we recommend minimising the time between certifying and applying the fix files. The safest strategy is to take the database offline and perform the logical and meta-data checks, the repairs and the upgrade in a continuous process.

The recommended backup procedure generates command files that you can use to restore a database in a new location and perform the analysis and repair parts of the certification process.

## Recommendations

- Before restoring a backup, take particular care to make the required changes to the INI file, as described in the [Instructions for preparing to restore](#) section.
- Choose the batch file that restores the database and performs the logical and meta-data analysis steps of certification.
- After restoring, compact the restored database. This will give you an indication of the benefits of compacting your production system and the time required.
- To prevent the restored system sending outward emails, turn on the **test system** as detailed in instructions below.
- To visually distinguish Windows client sessions on the restored system from those on the production system, use the **alternate skin** setting as detailed below.

### Instructions for preparing to restore

1. Copy the latest backup directory to the rehearsal machine.
2. Inspect the backup directory and confirm it contains the expected directories (bin, bin64, logs, system and Webroot) and batch files (certify, certifyRepair, restore and restoreAndCertify).
3. Confirm you have enough free disk space to restore the backup and perform certification, upgrade and compact operations. As a rough guide, you need twice as much free space as the size of your system folder.
4. If you are running Instant Secure or RPS, modify the jadegt.ini and logicalcertify.ini files to remove the [SyncDbService] and [ConnectionParams] sections. The certify process cannot be performed on a database with an active primary or secondary role. The Role is removed during the restore process using the clearSDSRole parameter in the batch file.
5. Systems that had JournalRootDirectory set as a custom location in the [PersistentDb] section of the jadegt.ini will still have the same value set in the backup copy. If your original was not an Instant Secure or RPS database then change this setting to JournalRootDirectory=logs. That's the default and will create a new folder for journals. You could change this to any folder location.
6. If your database was using Instant Secure or RPS, then you will now have a copy of the journal folder included in your backup system directory. Change the JournalRootDirectory parameter to this location, as the current journals will be needed during the restore process. In the example below, the original location was c:\logsdel and in the logicalcertify.ini file it was manually changed to d:\gt\system\logsdel. This is a sub folder of the backup system folder. Change this in the logicalCertify.ini and Jadegt.ini files.

```
LogDRExceptions=false  
JournalRootDirectory=d:\gt\system\logsdel  
JournalMaxSize=12M  
JournalArchiveDirectory=<default>
```

### Instructions for restoring and certifying using the batch file

1. In the new location, run the command file **restoreAndCertify.bat**
2. Check it completes without errors.
3. If errors are detected, look for logs and fix files in the **certify** subdirectory.
4. If there are no errors, remove or rename the original system directory, and rename the new **system-restore** directory to **system**.

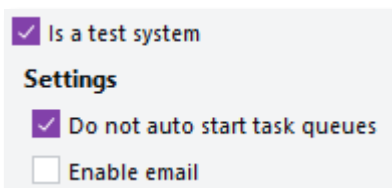
### Instructions for preparing the test system

After successfully restoring and certifying your system, follow these steps to prepare it for test use.

1. Turn on the test system setting by modifying the INI file on the server as follows:  
[JadeServer]  
IsATestSystem=true

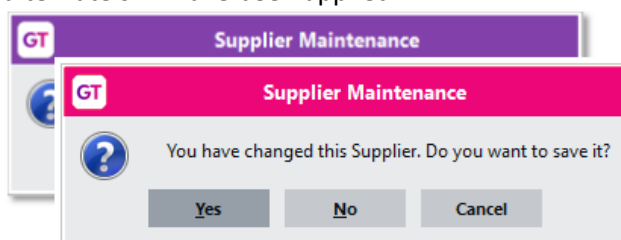
## Restoring and certifying

- Alternatively you can do this within the application by logging in in single-user mode, opening **System > System Setup > General System Preferences** and turning on **Is a test system**, turning on **Do not auto start task queues** and turn off **Enable email**.
- Turn on the alternative skin setting. Modify the INI file on the server as follows:



```
[JadeServer]
MYOBGreentreeSkin=Alternate
```

- Log in to the system in single-user mode and confirm the Test System setting and alternate skin have been applied.



- If the site uses the Browser client:
  - Change the setup on **System > System Setup > Browser Application Maintenance** to use test system setup on your web server.
  - Copy the new web resources to the test system directory on you web server.
  - Sign in to the *production* system's Browser to confirm it is unaffected by your changes.

## Instructions for performing certification in GUI mode

If you choose not to use the command file **restoreAndCertify.bat**, you can perform the analysis and repair steps using the Jade Logical Certifier GUI application.

Create a shortcut to the JadeLogicalCertifier application on RootSchema e.g.

```
D:\GreentreeCertTest\bin64\jade.exe path=D:\GreentreeCertTest\System
ini=D:\GreentreeCertTest\jadegt.ini app=JadeLogicalCertifier
schema=RootSchema Server=SingleUser
```

Start the application and follow these steps:

- From the **Operation** combo box:
  - for logical analysis, choose **Certify All Schemas**.
  - for meta-analysis choose **Meta Certify All Schemas**.
  - for applying fixes generated from an analysis choose **Repair**.
- For the Log File Directory create a unique location for logs and fix files e.g.  
D:\GreentreeCertTest\logs\LOGICALCERT  
D:\GreentreeCertTest\logs\METACERT
- For analysis operations choose multiple workers e.g. 5
- For analysis operations click **Certify** to begin the process.  
For repair click **Repair** and answer **Yes** to the prompt "Repair processing will update the certify fix and log files. Do you want to continue?" and **Yes** to the next confirmation prompt.



When the process completes, check for errors. If any were detected, apply the fixes as described in the next step.

# Performing repairs

If the analysis stage of logical certification or meta-certification detected errors, you should follow instructions in this section for applying repairs to the restored and production systems.

## Instructions for applying fixes

1. Take a copy of all files in the Log File Directory and put them aside for applying to your production system at a later step. The repair process will update the fix and log files.
2. Use the same shortcut to start the JadeLogicalCertifier application.
3. From the **Operation** combo box, choose **Repair**.
4. For the Log File Directory, choose the location you previously used for logs and fix files. For example, D:\GreentreeCertTest\logs\LOGICALCERT
5. Click **Repair** to begin the process.
6. Click **Yes** for the message that appears, "Repair processing will update the certify fix and log files. Do you want to continue?"
7. Click **Yes** for the second confirmation message.
8. When the process completes, check for errors. If any problems remain, do not proceed with further certification or upgrade steps. Instead, contact Jade Support for assistance and follow their requests and instructions.

## Recommendations

The analysis process generates fix files in the **certify** directory. These fixes can be applied to both the restored system and the production system. However, the repair process updates the fix files, so you'll need to copy them and put them aside before using them.

Repairs generally are quick to perform. Performing them on the restored system first will inform you whether they will succeed and how long they will take. You will need to schedule down-time in the production system to apply repairs there.

There are two ways you can apply a repair:

- Use the JadeLogicalCertifier GUI application.
- Prepare a batch file that runs a non-GUI version of the same application.

**Note:** After repairing the production system, obtain another backup. Then, redo the processes described in the [Restoring and certifying](#) section. You need to repeat this until you have a clean system that is free of logical and meta errors.

## Instructions for repairing the restored system

1. Make a copy of the files generated in the **certify** directory and put them aside.
2. Open the **\_logcert.fix** file from the **certify** directory in a text editor.
3. Search for **//FIX**. This text signals that a manual choice is required. If you require assistance, contact MYOB Greentree Support, and pass the copy of the generated files. If no choices are required, carry on.
4. Perform the repair on the restored system. Use the batch file **certifyRepair.bat**.

## Performing repairs

5. Confirm that the repair process completed without errors.
6. If the repair process failed, contact MYOB Greentree Support.

### Instructions for repairing the production system – GUI

1. Copy the fix files to the server.
2. Perform a backup on the production system.
3. Shut the system down.
4. Run the Jade certifier GUI application from a shortcut or batch file with these settings:  
app=JadeLogicalCertifier schema=RootSchema
5. For **Operation** choose Repair.
6. For **Log File Directory** choose the directory holding the fix files.
7. Click **Repair** and confirm.
8. If the repair process fails, contact MYOB Greentree Support.
9. Otherwise, close the application, restart the system, and perform another backup.
10. Take the next backup and return to the [Restoring and certifying](#) section.

### Instructions for repairing the production system – non-GUI

1. Copy the fix files to the server.
2. Perform a backup on the production system.
3. Shut the system down.
4. Copy the batch file certifyRepair.bat to the installation directory on the server
5. Modify the batch file so that it will work on the server. Remove the BackupDir and RestoreDir variables and ensure the path passed to jadclient specifies the system directory.
6. Run the batch file and check its results.
7. If the repair process fails, contact MYOB Greentree Support.
8. Otherwise, restart the system, and perform another backup.
9. Take the next backup and return to **Restoring and certifying**.

### After repairs

After applying fixes, you must run the analysis stage again to check for further errors. It's normal for it to take two or three cycles before the analysis reports that the system is clean.

# Applying the package

This section describes how to apply the Greentree package. This is done on a copy of the system before being done on the production system. You must not apply a Greentree package until you've taken a backup, restored a system from a backup, and certified your production system, as described in the previous sections.

For general information on running the Greentree package manager, Packman, see the [MYOB Greentree Deployment documentation](#).

## Rehearse

Rehearsal confirms your preparation and minimises the risk of problems when upgrading the production site. It also provides a system for user acceptance testing.

## Recommendations

- Use the system that you previously restored from backup and certified. This should make the rehearsal as close possible to upgrading the production system.
- Keep track of the time required to prepare, to apply the package and to verify the results. That way, you can be well-informed for applying the package production. If the machines have different specifications, expect the time to differ.
- Determine in advance the extent of testing required. The minimum should be confirming the ability of users to connect to the Windows client and browser client and using other forms of access.
- Leave the test system in place so it can be used to investigate any issues not found later.

## Instructions

1. Copy the file myobgreentree.2022.3.0.package into the **\packages** directory.
2. Locate the [JadeLog] section of the server's INI file. If the LogDirectory setting is present and holds a relative path, you will need to change it. If the setting is LogDirectory=logs, you can delete the line entirely, and Jade will apply the default. Otherwise, change the setting to an absolute path. For example, LogDirectory=C:\Greentree\JadeLogs
3. Run Packman from the **\bin64** directory. Click start and confirm.
4. When Packman completes, confirm the package has been imported without errors. Check the display window. For a full text copy, see \bin64\packCurrentLog.log.
5. If the site is running Greentree Browser, copy the Webroot files to the test location on your web server.
6. Confirm access and basic operation in single-user mode.
7. Start the system in multi-user mode and confirm remote access.

### Instructions for updating Web Server Test facility

If the site is running Greentree Browser and you have a test web server, or you have a test facility on your web server, follow the [Instructions for updating Web Server](#) below. However, be very careful to update the test facility, not the live system.

## Upgrade production

Before applying the package to the production site, confirm that the preparation detailed in all previous sections has been completed. You should have a clear plan for the upgrade and know exactly how you will execute your fall-back plan, if you need to.

### Recommendation

- Confirm arrangements with clients and IT support for the outage.

### Instructions

1. Double-check storage space.
2. Confirm the location and date of the latest backup.
3. Shut down the system using GreentreeShutdown.exe.
4. Shut down Windows services.
5. Confirm that no Jade processes are running by using Windows Task Manager.
6. Copy the package file myobgreentree.2022.3.0.package into the **\packages** directory
7. Locate the [JadeLog] section of the server's INI file. If the LogDirectory setting is present and holds a relative path, you will need to change it. If the setting is LogDirectory=logs, you can delete the line entirely, and Jade will apply the default. Otherwise, change the setting to an absolute path. For example, LogDirectory=C:\Greentree\JadeLogs
8. Copy Packman.exe version 6.0.0.0 to the **\bin64** directory.
9. Run Packman.exe from the **\bin64** directory. Click start and confirm.
10. When Packman completes, confirm the package has been imported without errors. Check the display window. For a full text copy see \bin64\packCurrentLog.log.
11. If the site is running Greentree Browser, copy the Webroot files to the live location on your web server.
12. Restart the system in multi-user mode.
13. Confirm remote access.

### Instructions for updating Web Server

These instructions apply to sites running Greentree Browser.

1. Update the Webroot directory on the web server. You need to completely replace the files with the new copies on the site's webroot directory.
  - a. Remove the old directories from the web server, being careful to leave other directories, such as eCRM, in place.
  - b. Copy the new materials to the Webroot directory. You should replace directories greentree-desktop, greentree-login, greentree-mobile and resources, and file version.json.

2. Alternatively, use the push function on the Browser Application Maintenance form. This is accessible by selecting the **System > System Setup** menu item. On the **Website Settings** tab, use **Create Batch File** and **Update Now**.
3. Copy the files jadehttp.dll and jadehttp.pdb from the system's bin64 directory to the bin directory on the web server, replacing the existing files there.
4. Confirm access to Browser by logging in from a local machine.

# New client files

The 2022.3.0 release deploys new files required for Jade thin client connections to the server's bin64 directory. These files include:

- New versions of MYOB\_GreenTree\_FREE.xla
- New versions of GreentreeInterface.dll and GreentreeInterface.exe.
- Jade's new ODBC drivers.

As a result, you will need to verify that the users can use FREE and ODBC.

## ODBC Data Source Administration

This release delivers an updated 64-bit Jade ODBC driver to the server's bin64 directory. At the first attempt by a user to log in to Greentree, Connection Manager will download the driver to the client machine. If the client previously registered the 64-bit version of the Jade 2018 ODBC driver, the replacement will work cleanly.

### Recommendations

- Check that you can connect from a local machine. If there's a problem, you will need to unregister the prior version first.

# Compacting the database

Database compaction is a routine maintenance job that can minimise storage requirements. You may choose to combine it with applying a Greentree upgrade.

## Recommendations

If you're unsure of the time required and reduction in database size, you can perform compaction on a copy of the production system. This will guide your decision on whether to compact the production system as a whole or to compact only selected files or to do no compaction.

Compaction has the potential to affect system performance, so it's normally done in single-user mode, or in multi-user mode at an off-peak time.

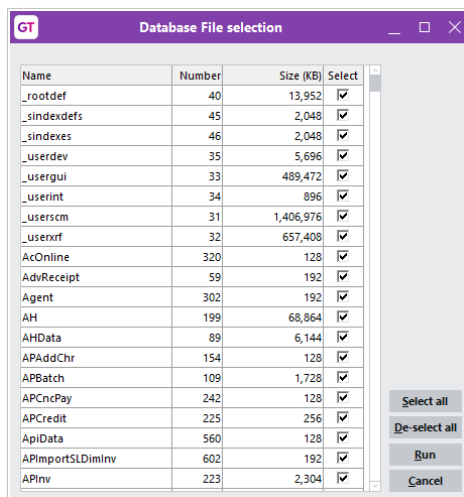
You can perform compaction using a system script within the Greentree Windows client when the system is running in single-user or multi-user mode.

Alternatively, you can do the same with the system shut down using the Jade database utility, `jdbutil.exe`, or in batch mode using `jdbutilb.exe`. This allows you to specify multiple worker threads, so it should be faster. It also provides a helpful free-space evaluation process.

In either case, record the size of the system directory before and after compaction, so you can assess the overall reduction.

## Instructions for running from Greentree Windows client

1. Use menu item System > Utilities > System Scripts, locate the Database category, choose Compact database files.
2. Click Yes to the confirmation message.
3. Select the required database files.



## Instructions for running Jade database utility

1. With the system shut down, start `\bin64\jdbutil.exe`
2. Use menu item **File > Open database**, enter the path to the system directory. For example, `D:\GreentreeTest\system`
3. Use menu item **Operation > Evaluation free space**, add all files, click **OK** to begin. You can find potential size reductions on screen or in file `\logs\ospace.log`.
4. Use menu item **Operation > Compact files**, add all files, specify 5 workers and click **OK** to begin. You can find size reductions in the file `\logs\compact.log`.
5. On completion, use menu item **File > Close database** and exit.

## Instructions for running in batch mode

Create and run a batch file or enter a command of this form in a command window:

```
D:\GreentreeCertTest\bin64\jdbutilb.exe  
path=D:\GreentreeCertTest\System ini=D:\GreentreeCertTest\jadegt.ini  
compact workers=5
```