Taulia Add-on for SAP: Upgrade Guide

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Introduction

This document describes the process of upgrading the Taulia platform to the latest version. At some point in the Taulia software lifecycle, you must perform upgrades due to one or more of the following:

- An upgrade to your ERP/3rd party workflow.
- To obtain new features in the Taulia SAP Add-On.
- To remain current in your support agreement.

Please work with your Taulia representative (either through a support case or through your project team) throughout the course of your upgrade.

Checklist

Before you begin the upgrade, we recommend collecting the following information, in case you need to contact Taulia for contracted assistance:

- If you are using the POD, on what platform (Operating System) is the POD?
- If you are using Taulia Direct, what communication method is being used? E.g. direct API calls, PI/PO, CPI, other middleware.
- What version of SAP, including service packs, are you running?
- What version of the Taulia SAP Add-On are you running?
- What is your anticipated timeline?
- Who are the contacts within your organization on this project? Please provide email addresses, phones, and roles.
- Please return signed T&M agreement (Provided by the Taulia representative).

Taulia SecureShare Site

The Taulia SecureShare site contains all of the Taulia software packages and documentation described in this document. You can access the site here: https://secureshare.taulia.com/

If this is the first time accessing SecureShare, you can auto-register at https://secureshare.taulia.com/. If you need assistance, contact your Taulia representative. The access is controlled by the domain of the email address used to set up your account. If you are a third party contractor please use an email address with the customer's domain if you have it or contact your Taulia representative to provide access for your email domain to the customer's folder.

SAP Compatibility

The Taulia Add-on for SAP is compatible with any SAP® ERP 6.0 release. All enhancement packs are supported. Do not attempt to install the Taulia Add-on for SAP with a prior release of the SAP ERP system (such as 4.6c or 4.7) without direct consultation with Taulia Support and Professional Services.

The Taulia Add-on for SAP is compatible with SAP Business Suite on HANA (SAP running on a HANA Database) - utilize any of our existing supported versions.

The Taulia Add-on for SAP is compatible with S/4HANA Business Suite, however an upgrade for existing customer or a specific S/4 Taulia Add-on version is required. Please confirm that the version being loaded for S/4 SAP versions is a compatible Taulia S/4 version.

Since SAP Customers may have variety of Support or Service packages / patches in SAP Version, please be aware that OSS Notes may need to be installed on Customer SAP System for all functionality of Taulia Add-on for SAP to work.

Upgrade Overview

Upgrading the SAP Add-On also involves upgrading the Taulia POD (POD installations) or Taulia Direct Connector (PI/PO, CPI, or other middleware) and possibly performing some additional system configuration. The upgrade/installation tasks are described in subsequent sections.

The high-level upgrade procedures are as follows:

1. Complete any SAP/3rd party or other upgrade. You will need to consult the official SAP documentation or your 3rd party documentation for official upgrade/installation details.
2. Stop the communication with the Taulia platform.
    a. For POD installations, stop the POD service or daemon.
    b. For Taulia Direct installations, stop the dispatcher with the option to delete the and wait for the jobs to finish.
3. Upgrade all required Taulia components through transaction SAINT and install available support packs through transaction SPAM
4. Update the communication layer:
    a. POD Installations:
        i. Uninstall the old version of the POD.
        ii. Install the new version of the POD.
    b. Taulia Direct:
        i. Verify with a Taulia consultant if any updates are needed to the middleware set up
5. Test the connection.
6. Restart communication with the Taulia platform.
    a. Restart the POD service/daemon or
    b. Restart the dispatcher (Taulia Direct only).
7. Complete any additional system configuration.
8. Test and repeat for movement through your transport landscape.

Upgrading Taulia via SAINT

Installation (.SAR) files will be provided via Taulia SecureShare so they can be loaded into SAINT for upgrade. Detailed instructions on how to run the SAINT process are described in Taulia Add-on for SAP: Installation and Maintenance Guide. This guide also provides instructions on how to load Support Packs, in case they are available.

SAP now supports an Add-on Uninstall feature which is also outlined in the *Taulia Add-on for SAP: Installation and Maintenance* guide. In the case of an upgrade, do not uninstall the add-on. This action will clear all Taulia namespace tables and can not be restored.

Taulia Direct Upgrade

When integrating to Taulia using Taulia Direct, the outgoing messages created by the add-on contain a signature field used to identify and authenticate the ERP system in the Taulia Platform. As of Taulia Add-on for SAP version 5.0, SHA-256 is now the algorithm used to generate this signature. For Taulia Direct customers upgrading from a Taulia Add-on version lower than 5.0, the buyer API keys on the Taulia platform must be updated to use this new algorithm. These new API keys must be updated for the relevant Add-on key in the REST Key Configuration transaction /TAULIA/CRESTKEY. This must be done for each SAP client in order to maintain connectivity to the Taulia Platform.

Get in touch with your Taulia representative to generate new API keys in conjunction with your upgrade.

POD Upgrade

It is a requirement that the SAP Add-On be the same version as the POD, so if you plan to upgrade the Add-On, you will have to upgrade the POD as well. This section describes the steps for upgrading the POD.

Before you attempt to upgrade the POD you should be aware of the following important considerations:

1. Please consult your Taulia customer service representative before you upgrade to make sure that your system is ready to upgrade, that you have the most current files, and so forth.
2. Taulia strongly recommends that you perform a fresh install of the POD, as opposed to performing a manual upgrade of certain POD files.
3. Because this is a fresh install, it is recommended that you create a back-up of your configuration file (`pod.config`). A new configuration file will be inserted when you install the new POD instance. The required information parameter might have changed from one version to another, so it is good to have your original configuration file for reference. Do not copy your original file over the new configuration file. You will have to configure the new configuration file manually (again, using the original file as a reference).
4. If the POD server is changed as part of the upgrade, a new certificate needs to be installed in the POD keystore. Please consult your Taulia customer service representative to obtain the new certificate and instructions to import the certificate.
5. After you have upgraded the POD and connected it to SAP and the Taulia Platform, Taulia suggests that you DO NOT perform the post-installation initialization steps that were done as part of the first install.

Complete details on POD installation are available in the *Taulia Add-on for SAP: POD Install* guide.

POD Requirements

Hardware Requirements

- 2GB RAM
- Dual Core Processor
- 100 GB Available Space (The POD software is around 20 MB and the additional space will be used for logging).

Software Requirements

- Java Runtime Environment is required to run the POD.
    - Taulia is compatible with Java 8. All Taulia functionality is fully tested on Java 8 (OpenJDK Runtime Environment 1.8). We recommend to keep your Java 8 version updated with the highest patch level to avoid vulnerabilities.
    - Currently, the POD software is not compatible with Java 11.
- Java Connector version 3.1 or later.
- If you want the POD to connect with Taulia Platform using AES 256-bit encryption, your instance of Java needs to be enabled to support the encryption. By default it always supports

AES 128-bit encryption. The most recent versions of JRE include the JCE Unlimited Strength Jurisdiction Policy Files, to support AES 256-bit encryption. If you find you must download these policy files, you can access them at: http://www.oracle.com/technetwork/java/javase/downloads/jce8-download-2133166.html

Important: If you are using a 64-bit version of JRE, the SAP JCO must also be 64-bit.

POD Checklist

In order for POD to successfully install on your server, you must ensure that following procedures have been completed and the following items are available.

- The correct Java Runtime Environment is installed.
- SAP JCo is installed correctly.
- Access to the Taulia platform on a network level is enabled.
  - To test the access, use `telnet dispatch.staging.taulia.com 443`. The test should return a message that reads **Connected to...**
    Note: If you must connect with a proxy, disregard this point.
- Network level access to the SAP system.
  - To test the access, use `ping sapserver`.
- The Taulia Add-On for SAP must be installed in the SAP instance to which you will be connecting.

POD Installation

Deploy the POD Package

> For purposes of this document, `%POD_DIR%` will be used as the directory/folder from which all commands mentioned in this document will be executed (unless otherwise noted).

The POD is delivered as a .zip file named **tauliaPod-*<version>*_*<distro>*.zip**.

To deploy the POD package

1. Extract the **tauliaPod-*<version>*_<distro>.zip** POD application file into the directory from which you want run the POD.
2. Locate **sapjco3.jar** and copy it to the `%POD_DIR%/wrapper/lib` directory.
3. Locate either **sapjco3.dll** (Windows) or **libsapjco3.so** (Linux) file and copy it to the `%POD_DIR%/wrapper/lib` directory.
4. Initialize the POD application using the following command from within the `%POD_DIR%/wrapper/`

directory:

```
java -jar tauliaBase.jar --init-app
```

Initialization is successful when you a message similar to the following:

```
[root@server wrapper] # java -jar tauliaBase.jar

--init-app initializing folders and configuration Application
configuration and folders successfully initialized
```

Configure the POD Connection

The following steps describe the steps necessary to connect the POD to the SAP program and to the Taulia Platform.

Unless otherwise noted, the location and filename of the configuration is as follows:

```
%POD_DIR%/wrapper/pod/mem/pod.config
```

SAP Credentials

In the SAP section, specify the parameters for the SAP message server to which the POD will connect:

Field	Parameter Description
user	The RFC user name.
password	The RFC user password.
client	The SAP client being connected.

Field	Parameter Description
lang	The language of the RFC user.
appServer	The SAP application server to which the connection should be established. **Note**: Do not add this field if you are connecting through a load balanced setup (through messageServer).
systemNo	The system number that should be used for the connection. **Note**: Do not add this field if you are connecting through a load balanced setup (through messageServer).
messageServer	The message server to which the connection should be established in a load balanced setup. **Note:** Do not add this field if you are connecting only through appServer.
r3Name	The system ID that should be used for the connection through messageServer. This is the three-letter system ID. For example, `P01`. **Note**: Do not add the field if you are connecting only through appServer.
group	The logon group that should be used for the connection through messageServer. **Note**: Do not add this field if you are connecting only through appsServer.

Example of connection with `appserver`:

```
sap {
    user = 'SAP_USR'
    password = 'passwd'
    appServer = 'appsrv1'
    client = '800'
    systemNo = '00'
// messageServer = "IP or messageServer name"
// group = "PUBLIC"
```

```
// r3Name = "T60"
    lang = 'en'
}
```

Example of connection with `messageserver`:

```
sap {
    user = 'SAP_USR'
    password = 'passwd'
// appServer = 'appsrv1'
    client = '800'
// systemNo = '00'
    messageServer = "IP or messageServer name"
    group = "PUBLIC"
    r3Name = "T60"
    lang = 'en'
}
```

Taulia Credentials

In `pod.config`, update the TAULIA parameters for the correct connection to the Taulia Platform. HTTPS is the recommended connection mode for production.

Field	Parameter Description
protocol	For a secure connection, select **https**.
port	Select **443** for https connections.

Field	Parameter Description
host	The host that the POD should connect to (provided by Taulia). • **Staging Test Environment**: `host = dispatch.staging.taulia.com` • **NA1 Production**: `host = dispatch.na.taulia.com` • **EU1 Production**: `host = dispatch.eu.taulia.com`
path	Do not change this unless specifically instructed by Taulia.
truststore	Path to the trust store containing the required certificates to establish a secure connection. • **Staging, EU1 & NA1**: `trustStore = ssl/pod_truststore_v1`
username	Insert the username provided to you with your order.
password	Insert the password provided to you with your order.

Example of connection:

```
taulia {
    version = "1.2.6"
    partitionKey = ''
    rpc {
        protocol = 'https'
        port = '443'
        host = 'path the POD should connect to'
        path = '/xmlrpc'
        trustStore = 'ssl/pod_truststore'
        username = 'erp_system@domain.com'
        password = 'passwd'
```

```
        remoteServiceversions = ["Default":"1.2.6"]
    }
}
```

In the case where proxy settings are used, the POD configuration file will need to be updated with the following proxy lines. Replace the proxy hostname and port with your hostname and port.

Example of proxy connection:

```
taulia {
    version = "1.2.6"
    partitionKey = ''
    rpc {
        protocol = 'https'
        port = '443'
        host = 'path the POD should connect to'
        path = '/xmlrpc'
        trustStore = 'ssl/pod_truststore'
        username = 'erp_system@domain.com'
        password = 'passwd'
        remoteServiceversions = ["Default":"1.2.6"]
        proxy {
            hostname='web.int.customer.com'
            port=8083
        }
    }
}
```

Verify the Connections

1. Test the connectivity to SAP.

   In `%POD_DIR%/wrapper`, run the following command:

   ```
   java -jar tauliaBase.jar -t sap
   ```

2. Test the connectivity to the Taulia Platform.
   In `%POD_DIR%/wrapper`, run the following command:

```
java -jar tauliaBase.jar -t Taulia
```

3. If proxy is configured, then execute the following command:

```
java -Dhttp.proxyHost=<host> -Dhttp.proxyPort=<port> -jar
tauliaBase.jar -t Taulia
```

Run the POD in the Background

If there is a warning at the POD start, check the log file **wrapper.conf** in folder `%POD_DIR%/wrapper/`. Most of the time, these warnings are because a SAP JCo component could not be found by the POD wrapper to run as a background job. For example, in Linux/Unix platforms, it may be that the `sapjco3` library path (where **libsapjco3.so** is located) is not defined in `LD_LIBRARY_PATH` or the **sapjco3.jar** file path is not defined.

Installing the POD as a Daemon in Linux

To install the POD in Linux

1. In the `%POD_DIR%` installation directory, use the **tauliapod** script to manage the POD as a daemon process.
2. Execute the installation of the POD as Linux daemon with the following command:

```
./tauliapod install
```

3. Check the POD status. It should say that it is not running. Use the following command to view the status:

```
./tauliapod status
```

4. If it is still running, stop the POD:

```
./tauliapod stop
```

5. Start the POD as a daemon process (background job):

```
./tauliapod start
```

Installing the POD as a Service on Windows

In some cases, virus software may remove the .bat files during delivery. If this is the case, contact your Taulia representative for further instructions.

To install the POD on Windows

1. In the `%POD_DIR%` installation directory, open the **InstallPod.bat** utility. The utility must have the wrapper license to be able to start the POD as a Service.
2. When you see POD installed as a service, you can start or stop the POD through the standard Windows services tool.

For more information on the Windows Services Tool, see your Microsoft Windows documentation.

Additional Configuration

If any of the following items relate to your SAP Add-On version or business processes, please contact your Customer Service representative to help you solve the configuration issue:

- For Taulia Direct customers upgrading to Taulia Add-on version 5.0 or greater, new API keys need to be generated and stored in the REST API Key configuration.
- Tax ID Configuration needs to be updated beginning with SAP Add-On version 2.0.6.
- For version 2.0.6 and later, the POD Java software must be upgraded to Java 7.Versions 2.1.0 or later are compatible with Java 8.
- There was a bug discovered in recent updates for Java 7, starting with update 65 to update 71, that causes the POD to fail. This is a Java issue, and not an issue in the POD code.
- With SAP Add-On version 1.3.S113 Service Entry Sheets became part of the Taulia product. If you are upgrading from a version prior to this and are not using SES, you will need to configure this setting to match your business processes.

Maintenance

At the time of upgrade, this is an excellent time to review system maintenance. Please review the Taulia Add-on for SAP: Installation and Maintenance guide for a complete list. The following items are two areas that are very strongly encouraged for review to ensure system health.

Application Log Clean-Up

Taulia commits messages to the standard SAP application log. The expectation is that these messages will be deleted in accordance with the business strategy for system maintenance through `SLG2` or regular execution of `SBAL_DELETE` program. Taulia maintains a configuration for application logging in configuration transaction **`/TAULIA/BS_CBAL`**. This will only be populated after your consultant has input a value.

Taulia Log Clean-Up

Taulia maintains a specific log viewer in **`/TAULIA/CONNECTOR`**. This log viewer provides a clean way to review transactions that the traditional `SLG3` log review. These logs may be purged by running the Taulia program `/TAULIA/CT_POD_LOG_CLEAN_UP`. Taulia suggests regular purges of these values and has enabled this job in `/TAULIA/JOB_SCHEDULE`.

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