



Turn to the Experts.™

i-Vu Open System

Version 5.0 to 5.1 Upgrade Guide





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To upgrade i-Vu Open web server

Follow these steps to upgrade your i-Vu Open system:

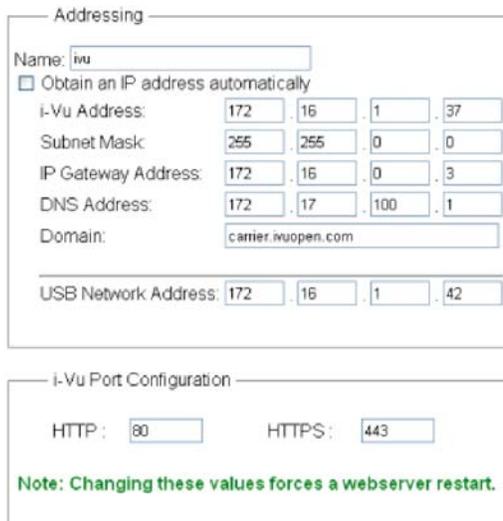
- 1 *Capture current i-Vu Open web server settings* (page 1).
- 2 *Backup your existing data* (page 2).
- 3 *Install new software* (page 2).
- 4 *Access updated i-Vu Open* (page 3).
- 5 *Restore data* (page 3).
- 6 *Restore Addressing settings* (page 3)
- 7 *Start i-Vu Open and update SAL libraries* (page 4).

Capture current i-Vu Open web server settings

Access the **Management Tool** using one of the following methods:

- Open i-Vu, click the **Main Menu** button , then select **System Options > General tab > Management Tool**
- Launch your browser and type your system name followed by **:8080**. For ex.: `http://ivu:8080/`.

Print the **Management Tool** screen or record all of the information under **Addressing** and **i-Vu Port Configuration**.



The screenshot shows two sections of the Management Tool interface:

Addressing

Name:

Obtain an IP address automatically

i-Vu Address: . . .

Subnet Mask: . . .

IP Gateway Address: . . .

DNS Address: . . .

Domain:

USB Network Address: . . .

i-Vu Port Configuration

HTTP : HTTPS :

Note: Changing these values forces a webservice restart.

Backup data from Management Tool

Use either of the following methods to backup your data:

Backup data to your PC

- 1 Click **PC Backup** under **Manage Server Data** to save the entire i-Vu database zipped into one file to your PC.
- 2 Click **OK** when you see the message **The system will be stopped and restarted. Do you wish to proceed?** Watch **Operation Status** to see the progress.
- 3 Click the message **Save/Download Backup File to Your Local Hard drive** when it appears.
- 4 Click **Save** when asked **Do you want to open or save this file?**
- 5 Save the file (system.backup.tgz) to a convenient location on your computer.
CAUTION! Do not alter the name of this file!
- 6 Exit from **Management Tool**.

Backup data to a USB drive

- 1 Plug your USB drive into any available USB port on your i-Vu web server.
- 2 Click **USB Backup** under **Manage Server Data** to save the entire i-Vu database zipped into one file to your USB drive.
- 3 Click **OK** when you see the message **The system will be stopped and restarted. Do you wish to proceed?** The **Operation Status** message updates as i-Vu prepares and creates the backup. Wait for **Operation Status** to state **No Background Operations Currently Active.**
- 4 Remove USB drive from the web server.

NOTES

- A check of the USB drive will show a backup file named **system.backup**
 - An error may be displayed under the **Management Tool** title stating **The USB device failed to mount and initialize. Connect the USB drive to the first USB port.** In this case, try a different USB drive or try rebooting the i-Vu Open web server, as there was an issue accessing the USB drive.
- 5 Exit from **Management Tool**.

Install new i-Vu Open 5.1 software

- 1 Remove the i-Vu Open web server from the network by disconnecting the LAN cable.
- 2 Insert the i-Vu Open 5.1 **Restore CD** into the i-Vu Open web server CD drive.
- 3 Shut down the i-Vu Open web server by pushing the On/Off button **once**. Wait for the blue light to turn off (could take as long as 2 minutes).
- 4 Press the On/Off button again to restart the web server. The installation begins automatically.
- 5 The **Restore CD** ejects when the installation is complete. This process takes several minutes.
- 6 **NOTE** Do not power off during the installation.

Access updated system

- 1 Connect a LAN cable between the computer and the i-Vu Open web server.
- 2 Make sure that the computer is set up for DHCP.
- 3 Allow about a minute after connecting the LAN cable for the IP addressing to complete.
- 4 Launch Internet Explorer to access your system. Type **http://lvu**.

NOTES

- Use only the i-Vu Open interface to navigate through i-Vu Open; do not use the browser's navigation buttons.
 - Disable all popup blockers. **IE > Tools > Turn Off Popup Blocker**.
- 5 **Accept** License Agreement.

IMPORTANT!

When **Startup** screen appears, click **Link to Management Tool** at the bottom of the screen. Do **NOT** fill in any information.



Restore data from backup

- 1 Click **PC Restore** or **USB Restore** under **Manage Server Data** in the **Management Tool**.
 - **PC Restore** - Browse to your backup file and click **Perform Restore**.
 - **USB Restore** - Place your backup USB drive in any port on the i-Vu web server. Select the backup file and click **Perform Restore**.
- 2 Restore is complete when **Operation Status** displays **No Background Operations Currently Active**.

Restore Addressing settings

- 1 Refer to the data recorded from your original i-Vu Open web server. See *Capture current i-Vu Open web server settings*. (page 2)
- 2 Enter your previous **Name**.
- 3 If your original setup did not have **Obtain an IP address automatically** checked, then enter **ALL** of the IP address information from the original configuration.
- 4 Enter your original settings in **i-Vu Port Configuraton**.
- 5 Click **Apply Changes** to save your updated settings.
- 6 Close the **Management Tool**.
- 7 Disconnect the LAN cable between the computer and the i-Vu Open web server and reconnect the web server to the customer's LAN.

Start i-Vu Open

- 1 If necessary, reconfigure the computer such that it is able to access the i-Vu Open web server over the customer's network.
- 2 Launch Internet Explorer, access i-Vu Open, and login.
- 3 Since the database was restored, the you must adjust the following:
 - o **Timezone, Date** - select appropriate options
 - o **Time** - enter the correct time! i-Vu Open will **not** automatically read the time from your computer.



- 4 Click **Next**.
- 5 Review entries. Click **Submit**. Wait for your system to launch. It will take a minute. If you get an error, type `http://<your system name>` in your browser and hit return.

Update equipment SAL libraries

The i-Vu SAL files update your i-Vu Open controllers. The SAL libraries contain control programs, graphics, drivers, BACview files, and other important controller data.

Carrier periodically provides updates, which include enhancements and bug fixes.

NOTES

- The library update only changes **default** graphics. If you have edited your graphic in ViewBuilder, it is not updated.
- The last digits in the sal library name are the release date of the library. A later date indicates a more recent library.
- All of the SAL files will not necessarily have the same <date> revision.
- To ensure that your installation is running the latest software, we recommend that you check *Control Systems Support* <http://www.hvacpartners.com/> for updates. Download the latest SAL files and apply them to all new installations.

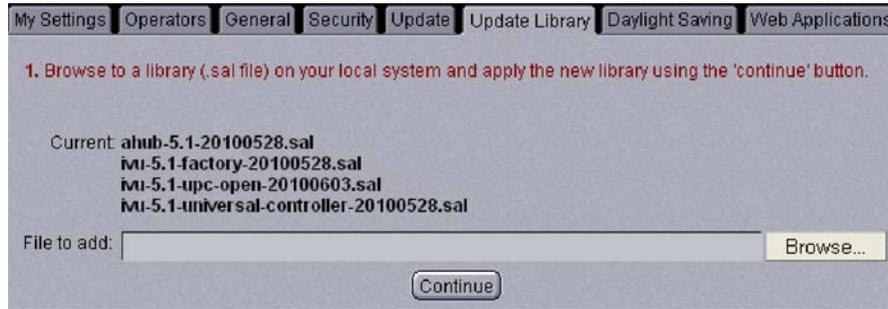
There are currently 4 SAL files used by i-Vu Open 5.1:

- `ivu-5.1-factory-<date>.sal` (For PIC-based controllers)
- `ivu-5.1-upc-open-<date>.sal` (For Universal Protocol Converter-based equipment)
- `ahub-5.1-<date>.sal` (For 39m AHU applications)
- `ivu-5.1-universal-controller-<date>.sal` (For UC and AppController-based applications)

NOTE Keep copies of the latest libraries in a safe place. In the event of a system restore, the updated .sal file must be reapplied.

Check SAL library version

- 1 Login to i-Vu Open using the **Installer** role.
- 2 Click **Main Menu** button , then select **System Options > Update Library** tab.
- 3 Note the listing of the current SAL libraries and their revision. Compare them to what you downloaded from the Control Systems Support site to determine if any have been updated.



- 4 Browse to and select the updated .sal file that you downloaded and saved to your computer or storage media and click **Open**.
- 5 Click **Continue**. When process is complete, the message appears **File added successfully**.
- 6 Click **Close**.
- 7 Repeat, as necessary, if more than one library file needs to be updated.

Refer to *Update your routers and controllers* (page 9) to complete upgrading your system.

To upgrade Field Assistant

Follow these steps to upgrade your Field Assistant systems:

- 1 *Install new software.* (page 6)
- 2 *Transfer existing databases.* (page 6)
- 3 *Update your equipment SAL libraries.* (page 4)

Install new Field Assistant 5.1 software

- 1 Insert your Tech Tools 5.1 DVD in your PC and click **Install Field Assistant Tool**. The i-Vu Open Tools menu should open.
- 2 Click on **Install Field Assistant Tool**.
- 3 Accept the license agreement.
- 4 Select directory where you wish to install Field Assistant (default is **C:\Field Assistant Tool5.1**).
NOTE Field Assistant 5.1 must be installed into a new directory; it cannot be installed over the top of an existing Field Assistant installation folder.
- 5 Select the **Start Menu** folder and locate Field Assistant (default is **Field Assistant Tool**).
NOTE We recommend that you add **5.1** to the default folder name in order to identify this version of Field Assistant, in case you decide to retain the previous version.
- 6 Review and accept the **Installation Summary**.
- 7 When installation is complete, select **Exit Installer** to close i-Vu Open Tools menu.

Transfer existing databases

Field Assistant 5.1 is compatible with systems created with Field Assistant 5.0. In order to use them, you must copy them so they reside under the Field Assistant 5.1 installation folder.

- 1 Navigate to your **Field Assistant 5.0** folder (default is **C:\Field Assistant Tool5.0**) and open the **webroot** folder.
NOTE Each system created in Field Assistant has a separate folder. By default, the following 2 folders are under webroot:
 - o **_common**
 - o **WEB-INF**
- 2 Select and copy the other folders, which should all be system databases. Use Shift-click or Ctrl-click to select multiple folders.
- 3 Paste/copy these folders into the new **Field Assistant 5.1 > webroot** folder (default is **C:\Field Assistant Tool5.1\webroot**).
NOTE Do **not** copy any folders other than your systems.

- 4 Start Field Assistant 5.1 to access the **Field Assistant Launcher** screen.
- 5 Select the appropriate **Communications** option, based on your connection to the system:
 - If you are connecting over the IP network, click **BACnet/IP** and select your IP. (This requires that the i-Vu Open Control System has one or more routers.)
 - If you are connecting to the system using the USB Link cable, click **Local Access**, and select the Comm port that the USB Link (USB-L) cable is attached to.
- 1 Select an existing system from the drop-down menu, or, to set up a new one, click  and type your **System Name**.

NOTES

- Do not begin your **System Name** with a number or use capital letters or special characters, other than a dash or an underscore.
- If you elect to use an existing system, any database updates necessary for compatibility with 5.1 take place when you launch Field Assistant.

- 2 Click the **Start**  button. Your browser automatically launches the **Discovery** screen.

NOTE This could take a few moments. However, if Field Assistant does not start automatically, type **http://localhost/** in your browser.

Update equipment SAL libraries

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NOTE Keep copies of the latest libraries in a safe place. In the event of a system restore, the updated .sal file must be reapplied.

To upgrade Field Assistant

- 1 Stop the **Field Assistant Server**, if it is running.
- 2 Copy the updated SAL file(s) to your Field Assistant Tool Installation path (Default: **C:\Field Assistant Tool5.1**) > **equipmentbuilder** folder.
NOTE Do not delete the older SAL file(s) to retain compatibility with older installations.
- 3 Start your system in Field Assistant.

Refer to *Update your routers and controllers* (page 9) to complete upgrading your system.

Update your routers and controllers

IMPORTANT! Update your routers and controllers only **once**. Use either i-Vu Open **or** Field Assistant.

Router and controller configurations are maintained when they are updated using the procedure below.

Step 1: Update the files for routers

- 1 Select the router that you wish to update in the navigation tree.
- 2 Right-click and select **Driver Properties** in the drop-down menu. A dialog window appears.
- 3 If the database contains two or more routers, then you must check **Change for all control programs of this type** in the **Control Program** section.
- 4 Click **Update**. A message appears **Changes the driver and bacview to use the current library version. Continue?**

NOTE If more than one router exists, the additional routers will be listed below the **Update** button.

- 5 Click **OK**.
- 6 When finished, click **Close**.

Step 2: Update the files for controllers

- 1 Double-click the controller in the navigation tree . A dialog window appears.
- 2 If you have multiple controllers of the same type, enable **Change for all control programs of this type?**
- 3 Click **Update** under **Control Programs**. A message appears **Changes the control program, view, driver and bacview to use the current library version. Continue?**
- 4 Click **OK**. When the message **Updated to the library version xx.** appears, click **Close**.
- 5 Repeat steps 1 - 4 for any additional types of controllers.
- 6 Click **Close** again.

Step 3: Apply the update to routers and controllers

- 1 Select the area/router level in the navigation tree.
- 2 Select any controllers with a **File Mismatch** error message. You can CTRL+click to multi-select.
- 3 Right-click and select **Download Files**. The updated control programs, graphics, drivers, and BACview files are now in your routers and controllers.



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