

bpmonline

bpm'online
update guide
from 7.11.0 to 7.11.1

[Simplify the future

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This update manual covers the process of updating bpm'online from version 7.11.0 to 7.11.1. Our team at bpm'online is constantly working to deliver advanced capabilities to automate your sales, service, and marketing processes. Here are the new [features included in bpm'online version 7.11.1](#).

Please note that the update process must be performed consistently and only between adjacent versions, i.e. to update bpm'online from version 7.10.3 to 7.11, you must first update to version 7.11.0.

Only the **Default** workspace will be updated. To save all information from the other workspaces, please move them to the "Default" workspace before updating.

HOW TO UPDATE

We recommend updating in two stages:

1. First update on a **pre-production site** with a copy of the current database.
2. If the first stage was completed successfully, update the **production** version of the application.

ATTENTION!

Update of the production version should not be carried out during business hours, as the site will be unavailable.

The update process consists of the following steps:

1. [Create a copy of the database](#) of the production site which will be required to deploy the pre-production site.
2. Create a new pre-production site in IIS. Application deployment is described in a separate [article](#).
3. [Install the update](#) on a pre-production site.
4. [Verify](#) the test site. If the primary and frequently used functions run without errors, then you can begin updating the production site.
5. [Stop the working version](#) of the application.
6. [Create copies](#) of the database and application. You will need them to return to a working version in case of problems.
7. [Install the update](#) to the production version.
8. [Run the website and verify](#) that the updated version is operational.
9. [Additional settings](#) for bpm'online lending.

ATTENTION!

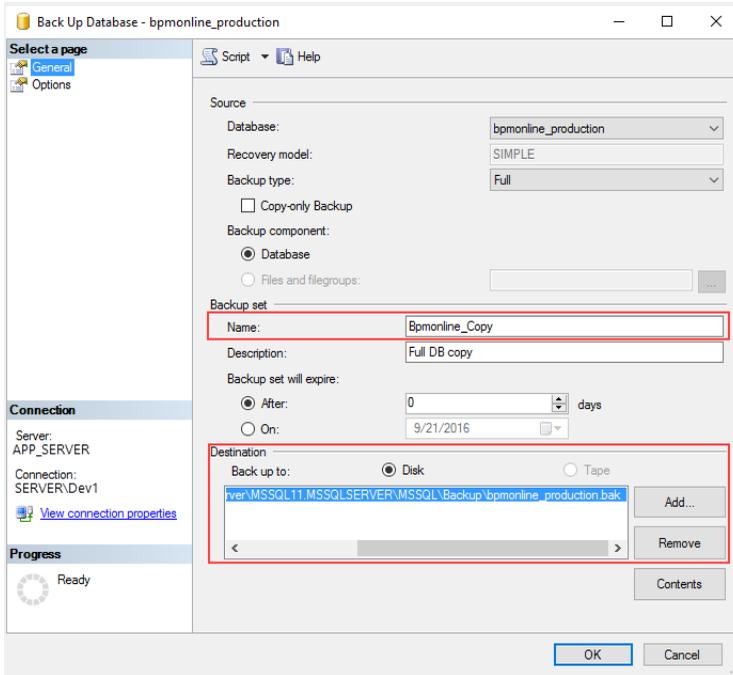
If the update process has failed, stop the procedure and contact the customer support.

CREATING DATABASE BACKUP

Production application database backup is required not only to return to the working site version in case of an update problem, but also to create a test site.

1. Run Microsoft SQL Server Management Studio.
2. Select the [Back Up] command under the [Tasks] section of the context menu of the application database catalog.
3. Specify the name of the database copy and the directory in which the backup will be created. Click the [OK] button to start the backup process.

Creating database backup



NOTE

Make sure the directory for the database backup copy already exists. The SQL server has no rights to create catalogs.

When updating the bpm'online production version, we recommend creating a copy of the application using any file manager.

To open a database backup:

1. Log in to Microsoft SQL Studio.
2. Create a new database if you need to extract only certain data from the backup, or select an existing database if you need to restore all data.
3. Select the [Restore database] command in the right-click menu of the database.
4. Specify path to the backup file in the opened window.
5. Click [OK] and wait for the restoration process to complete. More information is available in a separate [article](#).

INSTALLING UPDATES

To install the update:

1. Delete current bpm'online files from the production site catalog;
2. Unzip the new bpm'online files to the site catalog;

ATTENTION!

Unzipping files using the built-in Windows archiver is not recommended. We recommend using third-party software such as 7-Zip, WinRAR or WinZIP.

- Using any text editor, open `ConnectionStrings.config` located in the `bpm\online` root folder. Specify the appropriate server name and database name and connection parameters for the Redis server.
- Open the `WorkspaceConsole` catalogue. In our example, it can be found here:

```
[Path to bpm\online root folder]\Terrasoft.WebApp\DesktopBin\WorkspaceConsole\
```

- Run command prompt as an administrator, use it to open the `WorkspaceConsole` folder and execute one of the `.bat` files, depending on the type of your OS:
 - `PrepareWorkspaceConsole.x64.bat` for x64 version;
 - `PrepareWorkspaceConsole.x86.bat` for x86 version;

As a result, additional files will be copied to the `WorkspaceConsole` catalog from the `...\Terrasoft.WebApp\bin\` and `...\Terrasoft.WebApp\DesktopBin\WorkspaceConsole\x64\` (or `\x86\`).

- Edit `Terrasoft.Tools.WorkspaceConsole.exe.config` that shares a folder with `WorkspaceConsole`:
 - In the `<connectionStrings>` section, specify the connection parameters that are used in the `ConnectionStrings.config` configuration file;
 - In `<db>` section, set `connectionStringName="db"`.
- Download and extract the 7.10.3 update files [here](#).

ATTENTION!

The update needs to be performed consistently and only between adjacent versions.

- Extract the `InstallPackages` folder from the archive to the `WorkspaceConsole` folder (`...\Terrasoft.WebApp\DesktopBin\WorkspaceConsole`) of the application.

ATTENTION!

The absolute path to the `InstallPackages` directory must not be longer than 260 characters.

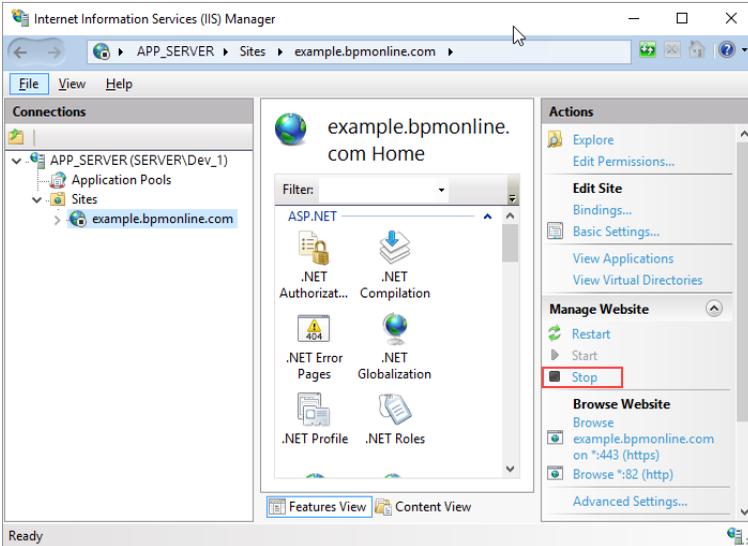
- In the extracted folder, locate and run `bpmOnlineUpdaterCLI.exe` that will update the connections and packages in the database. During the execution, a number of commands will be run sequentially. After the completion of each command, press [Enter] and wait for the process to complete.
- Generate client static content by running the [Compile all items] action in the [Configuration] section.

STOPPING THE SITE

To avoid data loss, we recommend you to stop the production website before upgrading. This step is not relevant when working with the test site.

- Open the Internet Information Services Manager (IIS).
- Stop the web site using the [Stop] command in the [Actions] area;

Stopping a website in IIS



VERIFYING WEBSITE OPERATION

After updating bpm'online, you need to verify the website:

1. Open the Internet Information Services Manager (IIS).
2. Start the web site using the [Start] command in the [Actions] area;
3. Open the test site with the help of the [Browse] command in the [Actions] area;

Opening test website in a web browser



4. Test the bpm'online application and the implementation of the basic and frequently used operations.
5. If everything works properly, you can delete the backup application and database.

ADDITIONAL STEPS FOR BPM'ONLINE LENDING

If you are using bpm'online lending and have a custom application page (FinApplicationPage), then perform the following steps after the base update scenario completes.

1. Update packages from SVN.
2. Run the UpdateFinAppLendingPage utility.

NOTE

Running the UpdateFinAppLendingPage from Windows command prompt:
UpdateFinAppLendingPage.exe "Path to the SVN local copy folder with the packages"

Example: UpdateFinAppLendingPage.exe C:\MyPackagesFromSvn\.

3. Commit changes to SVN.
4. Update the configuration from SVN by running the [Restore from repository] command in the [Configuration] section.

Enjoy the new version of bpm'online!