bpm'online

bpm'online update guide from 7.11.3 to 7.12

Contents

This manual covers the process of updating bpm'online from version 7.11.3 to 7.12. Our team at bpm'online is constantly working to deliver advanced capabilities to automate your sales, service, and marketing processes. The new features included in bpm'online version 7.12. can be found in the release notes.

Please note that the update process must be performed consistently and only between adjacent versions, i.e. to update bpm'online from version 7.11.2 to 7.12, you must first update to version 7.11.3.

> ### ATTENTION!
> Update requires .NET version 4.7 or higher.

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 upadte 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.
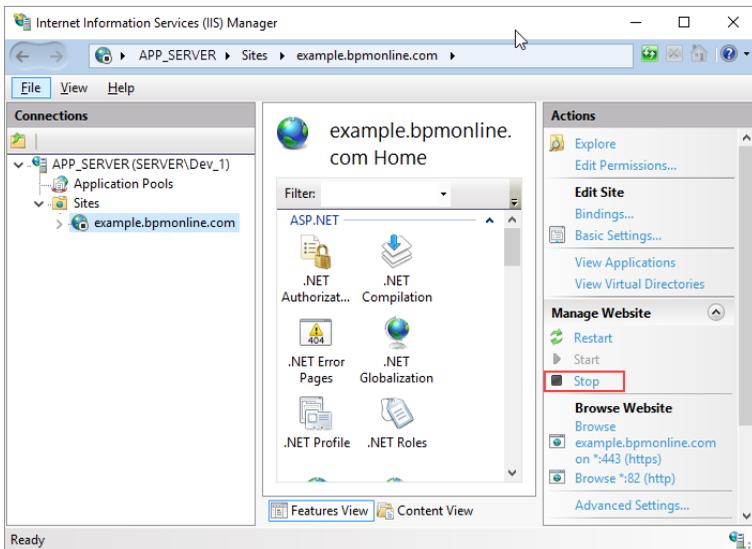8. Run the website and verify that the updated version is operational.

> ### ATTENTION!
> If the update process has failed, stop the procedure and contact the customer support.

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.

1. Open the Internet Information Services Manager (IIS).

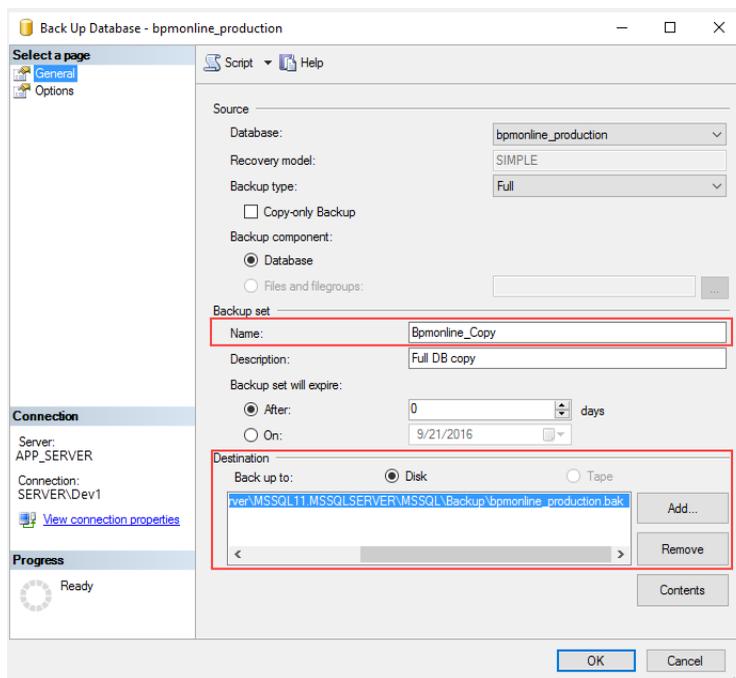2. Stop the web site using the [Stop] command in the [Actions] area;

HOW TO CREATE 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 catalogue.

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.

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 the Developing Guide.

INSTALLING UPDATES

Update requires application setup files for the new bpm'online version.

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!
   It is not recommended to unpack files using the built-in Windows archiver. The following applications are recommended for unpacking: WinRAR, WinZIP, 7-Zip.

3. 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.

4. Open the WorkspaceConsole folder:
   [Path to bpm'online root folder]\Terrasoft.WebApp\DesktopBin\WorkspaceConsole.

5. In the WorkspaceConsole folder, run the .bat file that corresponds to the OS bitness.
   - PrepareWorkspaceConsole.x64.bat for x64 version;
   - PrepareWorkspaceConsole.x64.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\).

6. Edit Terrasoft.Tools.WorkspaceConsole.exe.config that shares 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".

7. Download and extract the 7.12 update files here.

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

8. 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.

9. 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. Please wait for the entire process to complete.
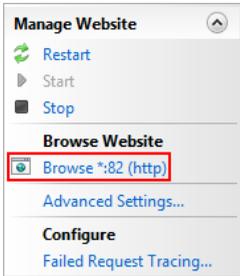
   ### NOTE
   Any errors encountered during the update will be recorded in the log file:
   [Path to bpm'online root folder]\Terrasoft.WebApp\DesktopBin\WorkspaceConsole\Log.
   In case of errors, please stop all update activities and contact bpm'online support immediately.

WEBSITE STARTING, COMPILATION AND VERIFICATION

After the update process has completed, start the bpm'online website in IIS, compile the application and test the website by opening it in a web browser.

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;

Manage Website ⌃
↻ Restart
▷ Start
■ Stop

Browse Website
🖥 Browse *:82 (http)
Advanced Settings...

Configure
Failed Request Tracing...

4. Generate client static content by running the [Compile all items] action in the [Configuration] section.

5. Open the application in a web browser, verify that your routine bpm'online operations are performed correctly.

6. If everything works properly, you can delete the backup application and database.

Enjoy the new version of bpm'online!