



PleaseReview 6.3 Upgrade Guide

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1 Introduction

1.1 Overview

This manual describes the process of upgrading PleaseReview 6.2 to 6.3.

If you are familiar with the PleaseReview upgrade process having upgraded before, this follows the same basic structure as other upgrades.

The skills required to perform the upgrade are largely the same as those to perform an installation (i.e. IIS, DBA, Windows Admin) – see the installation manual for full details. In addition, to understand some aspects of the compatibility you will need to be familiar with PleaseReview and the new features described in the release notes.

1.2 Scope

The manual covers all database platforms and upgrading from PleaseReview software version 6.2.

If your existing PleaseReview version is before 6.2, see section 7 for further details before proceeding.

1.3 Structure of this manual

This document contains the following sections:

- Section 2 discusses considerations you will need to be aware of when planning the upgrade, such as changes to platform requirements, or the impact on your existing data;
- Section 3 provides a simple “checklist” overview of the upgrade process;
- Sections 4 , 5 and 6 guide you through the upgrade process step-by-step;
- Section 7 gives information for customers upgrading from older versions.

2 Upgrade considerations

Note that this section does not discuss functional enhancements in the latest version of PleaseReview other than where they impact the upgrade process. Please see the release notes for details of these.

2.1 Platform compatibility

When planning the upgrade, you should first make sure your existing hardware and infrastructure are compatible with the updated server release. See the PleaseReview v6.3 Installation and Administration guide for more details.

2.2 Browser compatibility

PleaseReview 6.3 uses HTML5 features and requires a modern browser. Specifically, Internet Explorer versions before 11 are not supported (note that as of January 2016 these versions are now no longer supported by Microsoft).

2.3 Cross-compatibility with client components

2.3.1 Offline Client (OLC)

There is no new version of the OLC for 6.3. However, all OLC versions which are compatible with prior versions of 6.x are also compatible with 6.3.

2.3.2 Word Plug-in

There is no new version of the Word Plug-in for 6.3. All Word Plug-in versions which are compatible with prior versions of 6.x are also compatible with 6.3.

2.3.3 PDF Plug-in

Version 6.0 introduced a new PDF Review interface. If users still require the legacy PDF Plug-in so that they can complete existing reviews created prior to 6.0, the PDF Plug-in will continue to work. There is no new version of the PDF Plug-in for 6.3. All PDF Plug-in versions which are compatible with prior versions of 6.x are also compatible with 6.3.

2.4 License file compatibility

A 6.2 license file is NOT compatible with 6.3. Please ensure you have obtained a new license file before starting the upgrade.

3 Overview of the upgrade process

The upgrade process for PleaseReview 6.2 to 6.3 is an in-place upgrade and consists of the following steps:

- Back up the existing installation
- Install the new software
- Migrate the database
- Update the Web.Config
- Optionally remove the Open XML SDK 2.5
- System connector updates
- Test

4 Prerequisites

Ensure you have the software installation package and installation guide(s) for your existing version of PleaseReview.

If you have made additional changes over and above the standard installation process (e.g. advanced configuration or rebranding), you should also have a record of what has been changed so that you can reapply these changes. You may also find it useful to have a copy of your original PleaseReview installation package to refer to in case there are any doubts about exactly what has been changed.

5 Upgrade process

Upgrading PleaseReview from 6.2 to 6.3 is an in-place upgrade. This means that the new software will be installed into the existing directory structure. As there is not a new version of the PrizmDoc document viewer tool in this release it is not necessary to change the existing PrizmDoc software.

5.1 Back up existing installation

Firstly, stop the IIS Application Pool and the TaraService, then perform a full backup of the installation directory including the software itself and data directory.

The easiest way to do this is to simply make a copy of the entire directory structure on the disk. This will have the added benefit of preserving the file permissions, if the copy is not made to the desktop or some other area with the file permissions overridden from the default.

Also, perform a database backup (in addition to your normal backup) after the IIS Application Pool and the TaraService have been shut down. Detailed instructions for doing this are beyond the scope of this document.

5.2 Unpack the new software

Right click the PleaseReview zip file, called PleaseReview_Server_6.3.x.zip, select "properties", and ensure the "Blocked" option is not selected. With the IIS Application Pool and the TaraService still stopped, unzip the 6.3.x installer file into the directory containing your existing 6.2 installation.

5.3 Perform database migration

The database migration is performed by means of a SQL script in the runtime/config/migration directory and is called v6.3.<database>.txt.

For Microsoft SQL server, paste the migration script into SQL Server Management Studio.

For Oracle execute it by running the command-line SQL client program "sqlplus" with the input redirected from the script using "<". Execute the script using:

```
sqlplus <user>/<password> < v6.3.oracle.txt
```

making sure you connect as the database user that owns the PleaseReview tables. If sqlplus.exe is not on the path you will need to supply the full path to this.

If there are any errors reported from the migration, please contact PleaseTech support for further assistance. In this case you should be careful when re-running the script that only the parts that failed are re-run. Depending on the type of failure, it may be that you need to restore the database and re-execute the migration script after resolving the problem.

5.4 Update Web.Config

PleaseReview 6.3 introduces two changes to the Web.Config file.

- There is a change in the Dependent Assembly oldVersion value for Newtonsoft.Json
- There is an additional key for MaxHttpCollectionKeys in the appSettings section.

If you have made no changes to your current Web.Config file you can simply replace it with the new Web.Config.Template file.

If you have customized your Web.Config file, then make sure to:

- Make a backup of your current Web.Config file
- Replace the file with the new Web.Config.Template file
- Edit this file and replay any customisations.

As an example of a Web.Config customization, implementations that allow users to access Flight Mode will have made a change to the Web.Config to add a fixed machine key (see section 3.12.2 of the PleaseReview v6.3 Installation and Administration Guide, version 1.1). This entry will need to be replayed in the new Web.Config file in the same way as in the previous file.

Until the new Web.Config file is in place, PleaseReview will error at the login screen.

5.5 Restart the processes

To complete the upgrade, restart both the IIS Application Pool and the TaraService process. The system is now ready to test.

5.6 Optionally remove Open XML SDK v2.5

In releases prior to 6.3, PleaseReview shipped with the Open XML SDK version 2.5, which was a required part of the install. This dependency has been removed in 6.3 and the installer for the SDK no longer ships. As a result, you may remove this from your system, provided no other software is dependent on it.

To do this, please go to “Programs and Features” in the Windows Control Panel and remove it from there.

5.7 System connector updates

If you are not using a system connector (i.e. you manage all user details and passwords in PleaseReview directly) you can ignore this section.

System Connectors are now supplied as part of the core server package, not as separate downloads. However, implementing any integration other than Active Directory/LDAP remains an extra cost option.

To upgrade a system connector, you must copy your entries from your existing configuration files into the new template files in case the templates have changed. Please refer to the relevant system connector installation guide for more details.

For those integrations that have an additional UI component (OpenText Content Server, CARA, FirstDoc and WebTop), there will still be a separate download and you will find the latest installation instructions in the appropriate integration install guide.

6 Testing

To verify that the upgrade has been successful, the following basic tests are proposed:

- In an existing review, verify that:
 - It is possible to enter the review and see existing comments;
 - New comments can be made;
 - The reconciliation report can be viewed;
 - For Word documents, they can be downloaded with the comments applied;
 - Word documents appear using the new interface, but the user can switch to classic if required, and all the above functions work in both interfaces;
- Create a new review and verify that:
 - It is possible to create a new review;
 - Word (.doc and .docx), Excel (.xls and .xlsx), PowerPoint documents (.ppt and .pptx), and PDF files all prepare correctly;
 - Invitation emails get sent correctly;
 - New comments can be made;
 - The reconciliation report can be viewed;
 - Word documents appear using the new interface, but the user can switch to classic if required;
 - A PDF document in a review uses the new PDF review interface.

If some users encounter strange behavior in the web UI shortly after upgrading, there is a possibility that the client's browser might still be referring to a cached image, style sheet or JavaScript file, in this instance we would recommend that the user clears their browser cache.

7 Upgrading from versions before 6.2

If you wish to upgrade to 6.3 from a version prior to 6.2, you can achieve this by performing all the upgrades at once.

In this case you should ensure that you have taken account all the appropriate upgrade manuals (e.g. if you are upgrading from 5.1, you need to read the upgrade manuals for 5.2, 6.0, 6.1 and 6.2 as well as this one). The upgrades are all similar, but some have extra steps.

Since each release of the software is self-contained, there is no need to physically download and install any intermediate versions, but it is important to make sure that you perform all the database migrations in the correct sequence (the 6.3 download includes all the migration scripts for previous versions), and to make sure that you have included any extra steps from the other upgrade manuals.

In terms of compatibility with existing reviews and with client component versions, you will need to consult all the upgrade manuals and take the “worst case”.

The following table contains a checklist with the steps you will need to take depending on your current version of PleaseReview (e.g. if you are currently at 5.0, you will need to do all the items with a tick in the “5.0” column).

Task	4.5	5.0	5.1	5.2	6.0 / 6.1	6.2
Back up the existing installation	✓	✓	✓	✓	✓	✓
Check for duplicate email addresses (Oracle only) (see section 3.2 of the 5.0 upgrade guide)	✓					
Upgrade SQL Server if necessary (see section 3.3 of the 5.0 upgrade guide)	✓					
Upgrade MS Office if necessary (see section 3.4 of the 5.0 upgrade guide)	✓					
Install Microsoft .NET Framework 4.5.1 (see section 5.2 of the 5.1 Upgrade guide)	✓	✓				
Upgrade Oracle client software (see section 5.6 of the 6.2 upgrade guide)	✓	✓	✓	✓	✓	
Set application pool to .NET 4.0 (see section 5.5 of the 5.1 upgrade guide)	✓	✓				
Install the new software	✓	✓	✓	✓	✓	✓

Move data and merge configuration changes from the previous installation	✓	✓	✓	✓	✓	✓
Install new license file	✓	✓	✓	✓	✓	✓
Validate new configuration Entries	✓	✓	✓	✓	✓	✓
Perform database migration – see note below	✓	✓	✓	✓	✓	✓
Run the migration tool (see section 3.8 of the 5.1 Upgrade guide)	✓	✓				
Test	✓	✓	✓	✓	✓	✓

When performing the database migration, it is important to run all the migration scripts from the intermediate versions you are skipping, and these must be run in the correct (i.e. chronological) order. For instance, if upgrading from 5.1 directly to 6.3, you must run the 5.2, 6.0, 6.1 and 6.2 database migration scripts in that order.

If you are unclear in any way about how to perform such an upgrade, you should contact PleaseTech technical support before proceeding.

8 Notices

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