



# Upgrade Guide

Version 6.5

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# 1 Introduction

## 1.1 Overview

This manual describes the process of upgrading PleaseReview 6.4 to 6.5.

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

This manual covers upgrading from PleaseReview software version 6.4 on all Servers and database platforms.

If your existing PleaseReview version is before 6.4, 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 v6.5 Installation and Administration guide for more details.

### 2.2 Browser compatibility

PleaseReview 6.x 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 6.5. However, all OLC versions which are compatible with 6.4 are also compatible with 6.5.

#### 2.3.2 Word Plug-in

There is no new version of the Word Plug-in for 6.5. All Word Plug-in versions which are compatible with 6.4 are also compatible with 6.5.

### 2.4 License file compatibility

A 6.4 license file is NOT compatible with 6.5. Please ensure you have obtained a new license file before starting the upgrade.

### 3 Overview of the upgrade process

The upgrade process for PleaseReview 6.4 to 6.5 is an in-place upgrade and consists of the following steps:

- Back up the existing installation
- Remove old Prizm
- Install the new software
- Install new Prizm
- Migrate the database
- 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.

Step not required     Step Completed     Step Failed

Date and Signature:

## 5 Upgrade process

Upgrading PleaseReview from 6.4 to 6.5 is an in-place upgrade. This means that the new software will be installed into the existing directory structure. There is also a new version of the PrizmDoc document viewer tool in this release so it is necessary to upgrade 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.

Step not required     Step Completed     Step Failed

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### 5.2 Uninstall the existing PrizmDoc software

This is a document viewer tool required by PleaseReview. Installing it will have created two Windows services, "Prizm" and "Prizm Application Services". Both will be upgraded as part of this process.

Upgrading PrizmDoc requires that the existing version of PrizmDoc be removed first, then the new version installed. This must be done before the new software is installed.

**Please note that, by default, the un-install and re-install steps will make default configuration changes. If you have made extra configuration changes, or you PrizmDoc install is not a standard install, contact support who can provide a custom script to preserve your configuration changes.**

The PrizmDoc install can be located in three places:

1. Inside the PleaseReview home directory. This is the standard installation method and will create a Prizm directory beneath your PleaseReview home
2. In its own directory. This allows the copy of Prizm to be located separately from the PleaseReview software, for example, in order to improve performance
3. As a single PrizmDoc server, installed separately from PleaseReview, and taking requests from multiple PleaseReview installations

#### 5.2.1 Uninstall the existing software

In all cases, uninstall the existing software by using the script provided.

- Start/programs/accessories/command prompt (Run as Administrator)
- CD C:\Program Files\PleaseReview\Redist\PrizmDocInstaller

- UnInstallPrizmSilent.cmd <location>

Where:

<location> is the directory the PrizmDoc software was installed in. If not specified, this will default to the Prizm directory beneath the PleaseReview home.

For example:

```
UnInstallPrizmSilent.cmd c:\Prizm
```

**Please note that this un-installation step may take a while to run. Depending on the specification of the server this could be around 20 minutes.**

- Test to see if PrizmDoc has been full removed by confirming neither of the services are present and that the directory has been cleaned up.
- If you see anything else, please contact support before proceeding with the installation.

## 5.3 Unpack the new software

Right click the PleaseReview zip file, called PleaseReview\_Server\_6.5.x.zip, select "properties", and ensure the "Blocked" option is not selected. Ensure the IIS Application Pool and the TaraService are stopped.

### 5.3.1 Rename old version

Rename the existing PleaseReview directory to PleaseReview.6.4 or similar.

Note that an error will occur if any process is accessing files or directories underneath the installation root. If this happens, make sure that the IIS application pool and the TaraService are stopped and that you have no explorer or command windows open that are referencing this directory. If the problem persists, we recommend use of Microsoft's "Process Explorer" which can search to find which process has open files in that directory.

### 5.3.2 Install new version

Create the new installation directory with the same name as the old one. This means that the existing virtual web root and service registry entries etc. will continue to work.

Extract the installation zip file, rename the template files and set the file permissions as specified in the PleaseReview Installation and Administration guide.

Note that it is not necessary to perform the other steps in the installation manual.

Step not required     Step Completed     Step Failed

Date and Signature:

## 5.4 Upgrade PrizmDoc

PleaseReview 6.5 uses a new version of the PrizmDoc software removed in step 5.2.

### 5.4.1 Install the new software

- Start/programs/accessories/command prompt (Run as Administrator)
- CD C:\Program Files\PleaseReview\Redist\PrizmDocInstaller
- InstallPrizmSilent.cmd <service account> <password> <location>

Where:

<service account> is the "PleaseReviewService" user created during the original 6.x install process, and of the format of .\

<password> is the unencrypted password for the PleaseReviewService account

<location> where to install the PrizmDoc software. This will default to a directory underneath the PleaseReview home.

For example:

```
InstallPrizmSilent.cmd .\PleaseReviewService YOurPassw0rd
```

**Please note that this installation step may take a while to run. Depending on the specification of the server this could be around 20 minutes.**

- Test to see if PrizmDoc is running OK, by going to the Admin link at <http://localhost:18681/admin>. If a number of processes and statuses are displayed in green the system is running correctly.
- Test to see if Prizm Application Services is running OK by going to <http://localhost:3000/health>. This should show simply "OK"
- If you see anything else, please contact PleaseTech support before proceeding with the installation.

Step not required     Step Completed     Step Failed

Date and Signature:

## 5.5 Move data and merge configuration changes from the previous installation

You now need to apply the configuration settings that were made in 6.4 to the new 6.5 installation, i.e. changes to files that are delivered with a template extension.

Normally this will only affect the config.xml and the web.config, but if you have done any more advanced configuration or customization, it could affect others as well.

If you followed the recommended approach when installing 6.4, you should still have the original 6.4 template files as well as the active configuration files, so if there is any doubt as to what has been changed, you can compare the two.

Generally, you should re-apply the changes to the new 6.5 configuration file. You should not simply copy the old configuration file from 6.4 into 6.5 because if the template has changed (e.g. a new configuration entry added), this will be missing from the configuration file which may cause unexpected behavior.

### 5.5.1 Runtime/Data directory

Move the entire "documentfiles" directory from the old installation directory to the new one.

Verify that the file permissions on the newly moved documentfiles directory are correct (they should inherit from the runtime/data directory).

Step not required     Step Completed     Step Failed

Date and Signature:

## 5.6 Perform database migration

The database migration is performed by means of a SQL script in the runtime/config/migration directory and is called v6.5.<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> < v6.5.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 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.

Step not required     Step Completed     Step Failed

Date and Signature:

## 5.7 Restart the processes

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

Step not required     Step Completed     Step Failed

Date and Signature:

## 5.8 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 and CARA), there will still be a separate download and you will find the latest installation instructions in the appropriate integration install guide.

Step not required     Step Completed     Step Failed

Date and Signature:

## 5.9 Perform cleanup

As PleaseReview 6.5 introduces a new version of PrizmDoc, once you have completed the upgrade and fully tested it, you may delete the previous version of the two PrizmDoc installers in order to reclaim space. To do this:

- Invoke Windows Explorer
- Navigate to C:\Program Files\PleaseReview\Redist\PrizmDocInstaller (or wherever you have installed PleaseReview)
- In this directory there will be two pairs of PrizmDoc installer executables:
  - PrizmDocServer-12.2
  - PrizmDocClient-12.2
  - PrizmDocServer-13.6
  - PrizmDocClient-13.6
- You may delete the two files with 12.2 in the name. Do NOT delete the two 13.6 files.

Step not required     Step Completed     Step Failed

Date and Signature:

## 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.

Step not required     Step Completed     Step Failed

Date and Signature:

## 7 Upgrading from versions before 6.4

If you wish to upgrade to 6.5 from a version prior to 6.4, 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, 6.2, 6.3 and 6.4 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 6.5 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	6.3	6.4
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 5.3 of the 6.4 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 node.js	✓	✓	✓	✓	✓	✓	✓	✓
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 6.5, you must run the 5.2, 6.0, 6.1, 6.2, 6.3 and 6.4 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.

**Note: any reviews created in versions of PleaseReview prior to 5.0 will no longer open in the new review interface. Those reviews will only open in Classic mode.**

## 8 Notices

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