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Legal Statements and Policies

This section provides legal statements and general policies for AgilePoint software and documentation.

Disclaimer of Warranty

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Government Rights Legend

Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the applicable license agreement and as provided in DFARS 227.7202-1(a) and 227.7202-3(a) (1995), DFARS 252.227-7013(c)(1)(ii) (Oct 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14, as applicable.

Virus-Free Software Policy

AgilePoint recognizes that viruses are a significant security consideration for our customers. AgilePoint takes the following measures to make sure our software is free of viruses upon delivery:

- AgilePoint is built on top of Microsoft .NET framework. The pre-compiled executable is a .NET Common Language Runtime (CLR) application, not a native machine binary. As far as is known at this time, there are no viruses that infect .NET CLR executables.
- The virtual environment for the product packaging process is fully isolated and protected, and anti-virus software is installed and running during packaging.
- The compiled and packaged software files are scanned by a variety of anti-virus software services before they are made available for customer download. An official disclosure document regarding the findings from our virus scanning activities is available upon request.
This section provides instructions for upgrading components of the AgilePoint NX Suite.

**Prerequisites**

- If you have a version of AgilePoint installed that is lower than v6.0, and you want to install AgilePoint v6.0 or higher, you must contact AgilePoint Professional Services.

**Good to Know**

- When the upgrade installer runs, it stops AgilePoint Server and other related services.
- When the upgrade installer runs, it creates a backup copy of the AgilePoint NX components in the folder [AgilePoint NX upgrade backup folder].Bk
Upgrade from AgilePoint NX v6.0 SP1 to NX v7.0

Use the procedures in this section if you already have installed in your environment AgilePoint NX v6.0 SP1, and you want upgrade to AgilePoint NX v7.0.

Run the Upgrade Installer

To run the AgilePoint NX Upgrade Installer, do the procedure in this topic.

Prerequisites

• Verify that AgilePoint NX v6.0 SP1 is installed on your machines. If you are performing an upgrade following a new installation, make sure you have installed all the components on all machines first before starting the upgrade.

  For more information, refer to How Can I Find the Installed Version of My AgilePoint Component?.

  In addition to the major version, note whether your installed version is lower than v6.0 SP1 Software Update 2. This information is important for upgrading Report Center.
  
  For more information, refer to Update the Reports Database.

• You must run the installer on every machine that has AgilePoint Server or AgilePoint client components installed. This includes:
  
  • AgilePoint Server machines - If AgilePoint Server is installed in an NLB environment, you must run the installer on every server in the environment where AgilePoint Server is installed.
  
  • AgilePoint NX Portal server machines - If AgilePoint NX Portal is installed on a different machine than AgilePoint Server, you must run the Upgrade Installer on the Portal machine. This is not a common configuration. Usually the Portal is installed on the AgilePoint Server machine.
  
  • Data Services machines - If AgilePoint Data Services is installed on a different machine than AgilePoint Server, you must run the Upgrade Installer on the Data Services machine. This is not a common configuration. Usually Data Services is installed on the AgilePoint Server machine.
  
  • Reports server machines - If AgilePoint NX Reports is installed on a different machine than AgilePoint Server, you must run the Upgrade Installer on the machine where Reports is installed. This is not a common configuration. Usually Reports is installed on the AgilePoint Server machine.
  
  • AgilePoint NX Developer machines - If you use AgilePoint NX Developer, you must run the Upgrade Installer on all machines where the AgilePoint NX Developer client is installed. AgilePoint Developer is a specialized, add-on component. Most AgilePoint NX users do not have this component installed. However, when it is installed, it is usually not installed on the AgilePoint Server machine.
  
  • Primary SharePoint server - If you use the SharePoint Integration component for AgilePoint NX, you must complete the upgrade procedure on your primary SharePoint server. However, note that you must also decide whether to use the automated or manual SharePoint installation procedure. Most organizations use the manual SharePoint upgrade procedure, rather than running the Upgrade Installer client on the SharePoint server.
  
  • If Visual Studio 2017 is installed on your machine, you cannot upgrade AgilePoint NX Developer with the AgilePoint NX Upgrade Installer. You must uninstall AgilePoint NX Developer v6.x, and then use the
AgilePoint NX Installer to install AgilePoint NX Developer v7.0. The AgilePoint NX Installer is a separate installation package.

For more information, refer to:

- Uninstall AgilePoint NX Developer.
- Install AgilePoint NX Developer.

- If a version of the AgilePoint SAP Connector from AgilePoint NX 6.x or earlier is installed on your machine, you cannot upgrade the SAP Connector with the AgilePoint NX Upgrade Installer. You must uninstall the SAP Connector, and then use the AgilePoint NX Installer to install the AgilePoint SAP Connector v7.0. The AgilePoint NX Installer is a separate installation package.

**Note:** Before you uninstall the AgilePoint SAP Connector, you must take note of the configuration. SAP access tokens use these configuration settings to connect to SAP.

For more information, refer to:

- Uninstall the AgilePoint SAP Connector.
- Install the AgilePoint SAP Connector.

- Log in to Windows using a user login that belongs to the local system’s Administrators group.

**Note:** On some versions of Windows, such as Windows Server 2012, you may need to also right-click the `Setup.exe` installation file, and click Run as Administrator.

- Applying this Service Pack will cause AgilePoint Server and other related services to restart. Make sure you perform the upgrade at times when these restarts will have minimal impact on your operations.
- Close any configuration utilities or screens for AgilePoint NX configuration.

**Good to Know**

- If you have v6.x installed, and you do an upgrade, the Upgrade Installer does not create a database for Data Entities. You must create this database on your database server, and then configure AgilePoint Server to connect this database.

  For more information, refer to Set Up a Database for AgilePoint Data Entities.

- Report Center was updated to V12 in AgilePoint NX v6.0 SP1 Software Update 2. If you have already installed AgilePoint NX v6.0 SP1 Software Update 2, you do not need to complete this task. If you are not sure whether you had AgilePoint NX v6.0 SP1 Software Update 2 installed, you can complete this task anyway. It will not damage your system.

  For more information, refer to Update the Reports Database.

**How to Start**

1. Right-click the AgilePoint NX upgrade installer package, and click Run as Administrator.
2. On the End User License Agreement for AgilePoint Software screen, review the license agreement, and click I accept the terms in the license agreement.
3. On the Extract files to directory field, click the Ellipses (...) button to select the folder where you want to extract the installation files.
4. On the **Information** screen, click **OK**.
   The upgrade installation files are extracted to the specified folder. When the extraction is complete, the **Information** screen shows.

5. On the **Information** screen, click **OK**.
6. Right-click the AgilePoint NX upgrade **Setup.exe** file, and click **Run as Administrator**.
Procedure

1. On the Welcome to AgilePoint NX Software Update Installation screen, if AgilePoint SharePoint Integration is installed on the SharePoint machine, complete this field as necessary.
Upgrade from AgilePoint NX v6.0 SP1 to NX v7.0

Field Name: I want to manually upgrade AgilePoint SharePoint Integration

Definition:

Function:
Specifies if you want to manually upgrade AgilePoint SharePoint Integration.

Accepted Values:
- **Deselected** - The SharePoint Integration solution files are updated automatically with no further intervention from you.
- **Selected** - The installer does not upgrade the SharePoint Integration solution files. You must upgrade them manually using the stsalcm command line tool.

Default Value: Deselected

2. Click **Next**.
3. On the **Verifying System Requirements** screen:
   - If there are any errors, correct them. Once you have resolved the issue, click **Recheck**.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PowerShell is installed</strong></td>
<td>PowerShell is installed on your primary SharePoint machine.</td>
</tr>
<tr>
<td><strong>Current user has local administrator privileges</strong></td>
<td>Log on to this machine as a user with administrator privileges.</td>
</tr>
<tr>
<td><strong>Supported version of the .NET Framework is installed</strong></td>
<td>Install a supported version of the .NET Framework on this machine.</td>
</tr>
<tr>
<td></td>
<td>For more information, refer to <a href="#">System Requirements for AgilePoint SharePoint Integration</a>.</td>
</tr>
<tr>
<td><strong>Visual Studio applications are closed</strong></td>
<td>Close Microsoft Visual Studio applications on this machine.</td>
</tr>
<tr>
<td>Issue</td>
<td>Resolution</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Legacy AgilePoint SAP Connector is not installed                                      | If a version of the AgilePoint SAP Connector from AgilePoint NX 6.x or earlier is installed on your machine, you cannot upgrade the SAP Connector with the AgilePoint NX Upgrade Installer. You must uninstall the SAP Connector, and then use the AgilePoint NX Installer to install the AgilePoint SAP Connector v7.0. The AgilePoint NX Installer is a separate installation package. **Note:** Before you uninstall the AgilePoint SAP Connector, you must take note of the configuration. SAP access tokens use these configuration settings to connect to SAP. For more information, refer to:  
  • Uninstall the AgilePoint SAP Connector.  
  • Install the AgilePoint SAP Connector. |
| AgilePoint NX Developer and Visual Studio versions match                                | If Visual Studio 2017 is installed on your machine, you cannot upgrade AgilePoint NX Developer with the AgilePoint NX Upgrade Installer. You must uninstall AgilePoint NX Developer v6.x, and then use the AgilePoint NX Installer to install AgilePoint NX Developer v7.0. The AgilePoint NX Installer is a separate installation package. For more information, refer to:  
  • Uninstall AgilePoint NX Developer.  
  • Install AgilePoint NX Developer. |

- If there are no errors, click **Next**.
4. After the upgrade installation is complete, click **Next**.
5. On the **Installation Completed** screen, click **Additional Required Upgrade Tasks** to complete the remaining procedures in this section.

Once the Upgrade Installer is complete, you must complete some additional upgrade tasks. The exact tasks depend on your specific system configuration.

For more information, refer to **Additional Required Upgrade Tasks**.
6. Click **Finish**

### Additional Required Upgrade Tasks

After you run the Upgrade Installer for AgilePoint NX v7.0, you must complete some additional upgrade tasks. The exact tasks depend upon your system configuration and the availability of Software Updates.

The order these tasks are listed is important. AgilePoint recommends you complete each task in the order shown in the table, if the task applies to your AgilePoint NX system.

<table>
<thead>
<tr>
<th>This Task Is Required For...</th>
<th>Explanation</th>
<th>Task To Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users:</td>
<td></td>
<td>Manually Upgrade SharePoint Integration with PowerShell</td>
</tr>
<tr>
<td>Who selected to manually install the On-Premises SharePoint Integration component in the Upgrade Installer.</td>
<td>This task is for users who want to install the SharePoint Integration component using PowerShell commands, instead of running the AgilePoint NX Installer on their SharePoint server machines.</td>
<td><strong>Manually Upgrade SharePoint Integration with PowerShell</strong></td>
</tr>
<tr>
<td>This Task Is Required For...</td>
<td>Explanation</td>
<td>Task To Complete</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------</td>
<td>------------------</td>
</tr>
<tr>
<td><strong>All Users</strong></td>
<td>This task is especially important because it applies to all AgilePoint NX v7.0 environments. <strong>The Data Entities component will not run if you do not complete this task.</strong></td>
<td>Set Up a Database for AgilePoint Data Entities</td>
</tr>
<tr>
<td>Users:</td>
<td>Report Center was updated to V12 in AgilePoint NX v6.0 SP1 Software Update 2. If you have already installed AgilePoint NX v6.0 SP1 Software Update 2, you do not need to complete this task. If you are not sure whether you had AgilePoint NX v6.0 SP1 Software Update 2 installed, you can complete this task anyway. It will not damage your system.</td>
<td>Update the Reports Database</td>
</tr>
<tr>
<td>Users:</td>
<td>This task only applies if you use AgilePoint NX to connect to SAP. The AgilePoint SAP Connector is an add-on component. This does not apply to most AgilePoint NX environments.</td>
<td>Upgrade the AgilePoint SAP Connector</td>
</tr>
<tr>
<td>Users:</td>
<td>Occasionally, new configuration settings are added to the AgilePoint Configuration List in SharePoint Integration. These configuration settings are not automatically added to the AgilePoint Configuration List in SharePoint, so they must be added manually. No new configuration list items have been added since the release of AgilePoint NX v6.0. If you are upgrading from a version of AgilePoint NX or AgilePoint BPMS v6.0 or lower, you may need to add or change the settings for your AgilePoint Configuration List. For more information, contact AgilePoint Customer Support.</td>
<td>Create New Settings in the AgilePoint Configuration List for SharePoint</td>
</tr>
<tr>
<td>All Users</td>
<td>It is highly recommended to install any Software Updates and Hotfixes that have been released since the initial release of v7.0. However, this is not strictly required, unless you encounter a bug that was fixed in one of these releases. Also, if you upgrade to v7.0 soon after the initial release, there may not be</td>
<td>Install Software Updates for v7.0</td>
</tr>
</tbody>
</table>
### Manually Upgrade SharePoint Integration with PowerShell

If you meet the prerequisites in this topic, you must manually upgrade AgilePoint SharePoint Integration. This topic describes the manual upgrade procedure with PowerShell commands.

**Prerequisites**
- AgilePoint SharePoint Integration installed.
- PowerShell is installed on the appropriate SharePoint machines.
- Log on to the SharePoint machine with a user account that belongs to the local Administrators group.
- You have applied your AgilePoint NX upgrade package on all applicable AgilePoint machines.
- When upgrading AgilePoint NX, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration**.

**Procedure**

1. Open the folder where the SharePoint Integration installer files are stored.
   
   The location of this folder will different for different versions of SharePoint. The path can also change if you select a different path to store the AgilePoint NX installation files.
   
   This is the default folder for an AgilePoint NX installation that uses SharePoint 2013 or 2016:
   
   - `C:\AgilePointInstaller\[AgilePoint NX version]\Net47\SharePoint`

2. Copy the following files to your primary SharePoint server machine:
   
   - `Ascentn.SharePoint.SettingsList.wsp`
   - `Ascentn.SharePoint.Dashboard.wsp`
   - `Ascentn.SharePoint.WFIntegration.wsp`
   - `Ascentn.SharePoint.ListForm.wsp`

3. On the primary SharePoint front-end web server, open the **PowerShell** command line tool.
   
   For SharePoint 2013, the default location is **Start > Microsoft SharePoint 2013 Products > SharePoint 2013 Management Shell**.

4. On the primary SharePoint front-end web server, in the **PowerShell** command line tool, upgrade the SharePoint Solution files.
   
   ```powershell
   Update-SPSolution -Identity Ascentn.SharePoint.SettingsList.wsp -LiteralPath
   ```
Set Up a Database for AgilePoint Data Entities

AgilePoint Data Entities is a new component in AgilePoint NX v7.0. The Upgrade Installer installs this component, but it cannot create the associated database on your database server. Therefore, you must create the database, and connect it to AgilePoint Server after you run the Upgrade Installer.

To set up a database for AgilePoint Data Entities, do the procedure in this topic.

Prerequisites
- You are upgrading from AgilePoint NX v6.0 SP1 to v7.0.
- Run the Upgrade Installer for AgilePoint NX 7.0.

Note: You must run the Upgrade Installer before you create Data Entities database.

Good to Know
- This component is required for all AgilePoint NX OnPremesis environments.
- It is only necessary to create the database. You do not need to create database tables.

Create a Database for Data Entities

To create a database for Data Entities, do the procedure in this topic.

How to Start
1. Make sure your SQL Server is up and running.
2. Open the SQL Server Management Studio:
   a. On your AgilePoint Server machine, click Start, and type Run.
b. Click Run.

c. On the Run screen, in the Open field, enter SSMS.exe.

d. Click OK.

**Procedure**

1. In SQL Server Management Studio, Right-click on Databases and select New Database.
2. On the New Database window, enter a database name.

**AgilePoint Database**

<table>
<thead>
<tr>
<th>Component</th>
<th>Database Name (Suggested but Optional)</th>
<th>Database Optional for Component?</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Entities</td>
<td>AP_Data_Entities_DB</td>
<td>No</td>
<td>Stores the data for the Data Entities component in AgilePoint NX.</td>
</tr>
</tbody>
</table>

**Configure the Database for Data Entities in AgilePoint Server**

To configure a database for Data Entities in AgilePoint Server, do the procedure in this topic.
Screen

Prerequisites

- Create a database for Data Entities on your database server.

How to Start

2. On the AgilePoint Server Manager screen, in the left pane, select your AgilePoint Server instance.
3. Click Open Server Configuration.
4. On the AgilePoint Configuration screen, click the Database tab.
5. On the Database tab, click the Data Entities tab.

Procedure

1. On the Data Entities tab, in the Database Type list, select Microsoft SQL Server.
2. Complete these fields.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Encrypt Database Setting</strong></td>
<td>Function:</td>
</tr>
<tr>
<td></td>
<td>Specifies whether to encrypt your stored database settings.</td>
</tr>
<tr>
<td></td>
<td>Accepted Values:</td>
</tr>
<tr>
<td></td>
<td>• Selected - Saves the database settings in encrypted format.</td>
</tr>
<tr>
<td></td>
<td>• Deselected - Saves the database settings in plain text.</td>
</tr>
<tr>
<td></td>
<td>Default Value: Deselected</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td>Function:</td>
</tr>
<tr>
<td></td>
<td>The user name for the account AgilePoint Server uses to connect to the database.</td>
</tr>
<tr>
<td></td>
<td>Accepted Values:</td>
</tr>
<tr>
<td></td>
<td>An alphanumeric string that contains a user name for the database.</td>
</tr>
<tr>
<td></td>
<td>Default Value: sa</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>Function:</td>
</tr>
<tr>
<td></td>
<td>The password for the authentication account.</td>
</tr>
<tr>
<td></td>
<td>Accepted Values:</td>
</tr>
<tr>
<td></td>
<td>An alphanumeric string that represents a password.</td>
</tr>
<tr>
<td></td>
<td>Default Value: None</td>
</tr>
<tr>
<td><strong>Integrated Security</strong></td>
<td>Function:</td>
</tr>
<tr>
<td></td>
<td>When integrated security is selected, the current Windows users account credentials are used for authentication.</td>
</tr>
<tr>
<td></td>
<td>To Open this Field:</td>
</tr>
<tr>
<td></td>
<td>1. In the Database Type list, select Microsoft SQL Server.</td>
</tr>
<tr>
<td></td>
<td>Accepted Values:</td>
</tr>
</tbody>
</table>
Upgrade from AgilePoint NX v6.0 SP1 to NX v7.0

3. In the **Database Server** field, enter the server name and domain for your database.

4. In the **Database Name** list, select the name of the database that you created for Data Entities.

   Click the **Ellipses** to get the database names in the Database Name list from the database server.

5. Complete this field.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Connection Pool Size</strong></td>
<td>Function: Specifies the maximum number of simultaneous database connections for the workflow database. Accepted Values: An integer. It is recommended to use a connection pool size that is $\geq 100$, or $2 \times$ the thread pool size. Default Value: 100</td>
</tr>
</tbody>
</table>

**Update the Reports Database**

This release includes an upgrade to **Report Center** V12. If you use Reports, you must update the Reports database. To update the Reports database, do this procedure.

**Prerequisites**

- You are upgrading from AgilePoint NX v6.0 SP1 to v7.0.
- **Run the Upgrade Installer** for AgilePoint NX 7.0.
- You have AgilePoint NX Report Center installed.
- Report Center was updated to V12 in AgilePoint NX v6.0 SP1 Software Update 2. If you have already installed AgilePoint NX v6.0 SP1 Software Update 2, you do not need to complete this task. If you are not sure whether you had AgilePoint NX v6.0 SP1 Software Update 2 installed, you can complete this task anyway. It will not damage your system.
**Procedure**

1. On the AgilePoint Server machine, open the file \[Report Center installation folder\]\bin\ahDbAdmin.exe.
2. On the Logi 12 Ad Hoc Management Console, click Select or Create an Instance.
3. Click Select an Existing Instance.
4. On the Select Instance window, click Browse, and select the main installation folder for the AgileReports application: \[Report Center installation folder\].
5. Click OK.
6. Click Manage an Instance.
7. Click Upgrade Instance.
8. Under Metadata Database, click Update.
9. Click Close.

**Upgrade the AgilePoint SAP Connector**

To upgrade the AgilePoint SAP Connector to v7.0, do the procedure in this topic.

**Prerequisites**

- Make a note of the information in these fields. When you configure AgilePoint SAP Connector v7.0, the values for these fields must be the same because these values are used in the SAP access token.
  - These fields are critical because they are used in the SAP access tokens:
    - **Pool Number** - This is provided in the Connection Pool list. When you configured the pool number in Connection Pool list, the same pool number shows in the Pool ID list in the SAP access token.
    - **Client**
    - **User**
    - **Password**
  - You may also want to note these fields, so that you can enter them again when you install the latest version of the SAP Connector. However, if these values change, it will not have an effect on your SAP access tokens:
    - **Description**
    - **Destination String**
    - **Connection Mode**
    - **Language**
    - **Min Pool Size**
    - **Max Pool Size**

**Procedure**

1. Uninstall any version of the AgilePoint SAP Connector for v6.x or earlier.
   For more information, refer to Uninstall the AgilePoint SAP Connector.
2. Install the AgilePoint SAP Connector for AgilePoint NX v7.0.

**Create New Settings in the AgilePoint Configuration List for SharePoint**

If you upgrade your version of the SharePoint Dashboard, new AgilePoint Configuration List items do not get added to the configuration list. To create new list items in the AgilePoint Configuration list, do the procedure in this topic.

Occasionally, new configuration settings are added to the AgilePoint Configuration List in SharePoint Integration. These configuration settings are not automatically added to the AgilePoint Configuration List in SharePoint, so they must be added manually. No new configuration list items have been added since the release of AgilePoint NX v6.0. If you are upgrading from a version of AgilePoint NX or AgilePoint BPMS v6.0 or lower, you may need to add or change the settings for your AgilePoint Configuration List.

For more information, contact AgilePoint Customer Support.

**Prerequisites**

- When you add an item to the AgilePoint Configuration List, it must follow the exact name and values in for the Configuration List for your version of SharePoint:
  - Set the AgilePoint Configuration List for Office 365 Integration
  - Set the AgilePoint Configuration List for SharePoint Integration On Premises
- AgilePoint SharePoint Integration installed.
- AgilePoint NX Dashboard is installed. For more information, refer to Add the AgilePoint NX App to a SharePoint Site.
- These instructions are for on-premises SharePoint.

**Good to Know**

- You must change the values in the list items before you can use SharePoint Integration.
- For all AgilePoint Configuration List settings, the following values apply:
  - **Application** - This value must be AgilePoint.
  - **Encrypted** - If you select this option, data associated with this setting is encrypted to and from SharePoint. This setting is optional except in these conditions:
    - If your AgilePoint Server instance is configured to use HTTP or HTTPS, the ImpersonatorPass setting must be encrypted.
    - New AgilePoint Configuration list items do not get added to the configuration list when you upgrade the version of the SharePoint Dashboard.

**How to Start**

1. Open a SharePoint site collection where the AgilePoint App Part or Web Part is installed.
2. Click **Settings > Site Contents**.
3. Click **AgilePoint Configuration**.
Procedure
1. On the **AgilePoint Configuration** list, click **New Item**.
2. In the **Title** field, enter the title of the configuration list item to create.
3. In the **AP Setting Value** field, enter the value of the configuration list item to create.
4. (Optional) In the **Description** field, enter a description or comments.

**Install Software Updates for v7.0**

After you run the Upgrade Installer and complete other upgrade tasks, it is highly recommended to install any Software Updates and Hotfixes that have been released since the initial release of v7.0.

**Prerequisites**
- Run the Upgrade Installer for AgilePoint NX 7.0.
- Complete all other tasks in Additional Required Upgrade Tasks that apply to your system.

**Good to Know**
- It is highly recommended to install any Software Updates and Hotfixes that have been released since the initial release of v7.0. However, this is not strictly required, unless you encounter a bug that was fixed in one of these releases. Also, if you upgrade to v7.0 soon after the initial release, there may not be any Software Updates or Hotfixes available.

**Procedure**
1. For information about the latest Software Updates and Hotfixes for this release, refer to Software Updates for AgilePoint NX v7.0.

**Update Your License Key**

To update your AgilePoint NX license key with a license key for a new version of AgilePoint NX, do the procedure in this topic.

**Prerequisites**
- AgilePoint NX OnPremises or AgilePoint NX PrivateCloud environment.
- The file **AgilePointNXReactivation.zip** and your license key.

  When you purchase an AgilePoint NX upgrade, AgilePoint Customer Support sends this file and your license key to your system administrator or primary contact.

**Procedure**
1. On your **AgilePoint Server machine**, unzip **AgilePointNXReactivation.zip**.
2. Copy the new **AgilePoint Server.dat** to the common path for your AgilePoint applications.
   - The default path is **C:/Program Files/Common Files/Ascentn**.
3. Open AgilePoint Server Configuration Utility.
4. When prompted, enter the license key for your new version of AgilePoint NX.

**Troubleshooting Upgrade Installer**

To resolve issues you encounter during the preinstallation checks for upgrade installer, do the procedures in this topic.

![Figure 1: Verifying System Requirements screen (Upgrade Installer)](image)

**Procedure**

<table>
<thead>
<tr>
<th>Issue</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>PowerShell is installed</td>
<td>PowerShell is installed on your primary SharePoint machine.</td>
</tr>
<tr>
<td>Current user has local administrator privileges</td>
<td>Log on to this machine as a user with administrator privileges.</td>
</tr>
<tr>
<td>Issue</td>
<td>Resolution</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Supported version of the .NET Framework is installed</td>
<td>Install a supported version of the .NET Framework on this machine. For more information, refer to System Requirements for AgilePoint SharePoint Integration.</td>
</tr>
<tr>
<td>IIS 6 Management Compatibility Role Service is active</td>
<td>Activate Management Compatibility Role Service on IIS 6 or higher. For more information, refer to Verify the IIS 6 Management Compatibility Role Service.</td>
</tr>
<tr>
<td>Visual Studio applications are closed</td>
<td>Close Microsoft Visual Studio applications on this machine.</td>
</tr>
</tbody>
</table>
| Legacy AgilePoint SAP Connector is not installed                     | If a version of the AgilePoint SAP Connector from AgilePoint NX 6.x or earlier is installed on your machine, you cannot upgrade the SAP Connector with the AgilePoint NX Upgrade Installer. You must uninstall the SAP Connector, and then use the AgilePoint NX Installer to install the AgilePoint SAP Connector v7.0. The AgilePoint NX Installer is a separate installation package  
  
  **Note:** Before you uninstall the AgilePoint SAP Connector, you must take note of the configuration. SAP access tokens use these configuration settings to connect to SAP.  
  
  For more information, refer to:  
  • Uninstall the AgilePoint SAP Connector.  
  • Install the AgilePoint SAP Connector. |
| AgilePoint NX Developer and Visual Studio versions match             | If Visual Studio 2017 is installed on your machine, you cannot upgrade AgilePoint NX Developer with the AgilePoint NX Upgrade Installer. You must uninstall AgilePoint NX Developer v6.x, and then use the AgilePoint NX Installer to install AgilePoint NX Developer v7.0. The AgilePoint NX Installer is a separate installation package  
  
  For more information, refer to:  
  • Uninstall AgilePoint NX Developer.  
  • Install AgilePoint NX Developer. |
Upgrade from AgilePoint NX v6.0 to NX v6.0 SP1

Use the instructions in this section if you already have installed in your environment AgilePoint NX v6.0, and you want upgrade to AgilePoint NX v6.0 SP1.

Run the Upgrade Installer

To run the AgilePoint NX Upgrade Installer, do the procedure in this topic.

Prerequisites

• Verify that AgilePoint NX v6.0 is installed on your machines. If you are performing an upgrade following a new installation, make sure you have installed all the components on all machines first before starting the upgrade.

  For more information, refer to How Can I Find the Installed Version of My AgilePoint Component?.

• You must run the installer on every machine that has AgilePoint Server or AgilePoint client components installed. This includes:

  • AgilePoint Server machines - If AgilePoint Server is installed in an NLB environment, you must run the installer on every server in the environment where AgilePoint Server is installed.

  • AgilePoint NX Portal server machines - If AgilePoint NX Portal is installed on a different machine than AgilePoint Server, you must run the Upgrade Installer on the Portal machine. This is not a common configuration. Usually the Portal is installed on the AgilePoint Server machine.

  • Data Services machines - If AgilePoint Data Services is installed on a different machine than AgilePoint Server, you must run the Upgrade Installer on the Data Services machine. This is not a common configuration. Usually Data Services is installed on the AgilePoint Server machine.

  • Reports server machines - If AgilePoint NX Reports is installed on a different machine than AgilePoint Server, you must run the Upgrade Installer on the machine where Reports is installed. This is not a common configuration. Usually Reports is installed on the AgilePoint Server machine.

  • AgilePoint NX Developer machines - If you use AgilePoint NX Developer, you must run the Upgrade Installer on all machines where the AgilePoint NX Developer client is installed. AgilePoint Developer is a specialized, add-on component. Most AgilePoint NX users do not have this component installed. However, when it is installed, it is usually not installed on the AgilePoint Server machine.

  • Primary SharePoint server - If you use the SharePoint Integration component for AgilePoint NX, you must complete the upgrade procedure on your primary SharePoint server. However, note that you must also decide whether to use the automated or manual SharePoint installation procedure. Most organizations use the manual SharePoint upgrade procedure, rather than running the Upgrade Installer client on the SharePoint server.

• Log in to Windows using a user login that belongs to the local system's Administrators group.

  Note: On some versions of Windows, such as Windows Server 2012, you may need to also right-click the Setup.exe installation file, and click Run as Administrator.
• Applying this Service Pack will cause AgilePoint Server and other related services to restart. Make sure you perform the upgrade at times when these restarts will have minimal impact on your operations.
• Close any configuration utilities or screens for AgilePoint NX configuration.

How to Start
1. Open the upgrade installer package.
2. On the End User License Agreement for AgilePoint Software screen, review the license agreement, and click I accept the terms in the license agreement.
3. On the Extract files to directory field, click the Ellipses (...) button to select the folder where you want to extract the installation files.
4. Click OK.
5. Right-click the AgilePoint NX upgrade Setup.exe file, and click Run as Administrator.

Procedure
1. On the Welcome to AgilePoint NX Software Update Installation screen, if AgilePoint SharePoint Integration is installed on the SharePoint machine, complete this field as necessary.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Definition</th>
</tr>
</thead>
</table>
| I want to manually upgrade AgilePoint SharePoint Integration | Function: Specifies if you want to manually upgrade AgilePoint SharePoint Integration.  
  Accepted Values:  
  • Deselected - The SharePoint Integration solution files are updated automatically with no further intervention from you.  
  • Selected - The installer does not upgrade the SharePoint Integration solution files. You must upgrade them manually using the stsdam command line tool.  
  Default Value:  
  Deselected |

2. Click Next.
3. On the Verifying System Requirements screen:
   • If there are any errors, correct them. Once you have resolved the issue, click Recheck.

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>PowerShell is installed</td>
<td>PowerShell is installed on your primary SharePoint machine.</td>
</tr>
</tbody>
</table>
Issue | Resolution
---|---
**Current user has local administrator privileges** | Log on to this machine as a user with administrator privileges.

- If there are no errors, click **Next**.

4. Once the upgrade installer has finished, complete the remaining procedures in this section. Each remaining procedure is required if you meet the prerequisites.

### Manually Upgrade SharePoint Integration with PowerShell

If you meet the prerequisites in this topic, you must manually upgrade AgilePoint SharePoint Integration. This topic describes the manual upgrade procedure with PowerShell commands.

**Prerequisites**
- AgilePoint SharePoint Integration installed.
- PowerShell is installed on the appropriate SharePoint machines.
- Log on to the SharePoint machine with a user account that belongs to the local Administrators group.
- You have applied your AgilePoint NX upgrade package on all applicable AgilePoint machines.
- When upgrading AgilePoint NX, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration**.

**Procedure**

1. Open the folder where the SharePoint Integration installer files are stored.
   - The location of this folder will different for different versions of SharePoint. The path can also change if you select a different path to store the AgilePoint NX installation files.
   - This is the default folder for an AgilePoint NX installation that uses SharePoint 2013 or 2016:
     - `C:\AgilePointInstaller\[AgilePoint NX version]\Net45\SharePoint`
   - This is the default folder for an AgilePoint NX installation that uses SharePoint 2010:
     - `C:\AgilePointInstaller\[AgilePoint NX version]\Net35\SharePoint`

2. Copy the following files to your primary SharePoint server machine:
   - Ascentn.SharePoint.SettingsList.wsp
   - Ascentn.SharePoint.Dashboard.wsp
   - Ascentn.SharePoint.WFIntegration.wsp
   - Ascentn.SharePoint.ListForm.wsp

3. On the primary SharePoint front-end web server, open the **PowerShell** command line tool.
   - For SharePoint 2013, the default location is **Start > Microsoft SharePoint 2013 Products > SharePoint 2013 Management Shell**.

4. On the primary SharePoint front-end web server, in the **PowerShell** command line tool, upgrade the SharePoint Solution files.
   - `Update-SPSolution -Identity Ascentn.SharePoint.SettingsList.wsp -LiteralPath`
Upgrade from AgilePoint NX v6.0 to NX v6.0 SP1

Create New Settings in the AgilePoint Configuration List for SharePoint

If you upgrade your version of the SharePoint Dashboard, new AgilePoint Configuration List items do not get added to the configuration list. To create new list items in the AgilePoint Configuration list, do the procedure in this topic.

Occasionally, new configuration settings are added to the AgilePoint Configuration List in SharePoint Integration. These configuration settings are not automatically added to the AgilePoint Configuration List in SharePoint, so they must be added manually. No new configuration list items have been added since the release of AgilePoint NX v6.0. If you are upgrading from a version of AgilePoint NX or AgilePoint BPMS v6.0 or lower, you may need to add or change the settings for your AgilePoint Configuration List.

For more information, contact AgilePoint Customer Support.

Prerequisites

- When you add an item to the AgilePoint Configuration List, it must follow the exact name and values in for the Configuration List for your version of SharePoint:
  - Set the AgilePoint Configuration List for Office 365 Integration
  - Set the AgilePoint Configuration List for SharePoint Integration On Premises
  - AgilePoint SharePoint Integration installed.
  - AgilePoint NX Dashboard is installed. For more information, refer to Add the AgilePoint NX App to a SharePoint Site.
  - These instructions are for on-premises SharePoint.

Good to Know

- You must change the values in the list items before you can use SharePoint Integration.
- For all AgilePoint Configuration List settings, the following values apply:

5. On each SharePoint machine that is a front-end web server, in the PowerShell command line tool, execute the following command:

```
Install-SPApplicationContent
```

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• **Application** - This value must be **AgilePoint**.

• **Encrypted** - If you select this option, data associated with this setting is encrypted to and from SharePoint. This setting is optional except in these conditions:
  • If your AgilePoint Server instance is configured to use HTTP or HTTPS, the ImpersonatorPass setting must be encrypted.

• New AgilePoint Configuration list items do not get added to the configuration list when you upgrade the version of the SharePoint Dashboard.

### How to Start
1. Open a SharePoint site collection where the AgilePoint App Part or Web Part is installed.
2. Click **Settings > Site Contents**.
3. Click **AgilePoint Configuration**.

### Procedure
1. On the AgilePoint Configuration list, click **New Item**.
2. In the **Title** field, enter the title of the configuration list item to create.
3. In the **AP Setting Value** field, enter the value of the configuration list item to create.
4. (Optional) In the **Description** field, enter a description or comments.
Activating AgilePoint Licenses

This section provides instructions for activating the licensed components of the AgilePoint Suite.

Activating Over the Internet

Internet activation is recommended for all machines with Internet connections.

Prerequisites

- An Internet connection
- Administrator privileges
- You are running a licensed product that meets one of the following conditions:
  - It is the first time you've run the product after installation
  - It is the first time you've run the product after an evaluation license key expired

How to Start

1. Open the application you want to activate. The Activation Wizard appears.

Procedure

1. On the Activation Wizard, select Activate by using Internet.
2. Click Next.

Your product should be activated automatically within a few seconds.

Activating Manually

Use manual installation if you are unable to activate over the Internet.

Prerequisites

- Administrator privileges
- You are running a licensed product that meets one of the following conditions:
  - It is the first time you've run the product after installation
  - It is the first time you've run the product after an evaluation license key expired

How to Start

1. Open the application you want to activate. The Activation Wizard appears.

Procedure

1. On the Activation Wizard, select Activate manually.
2. Click **Next**.

3. On the **Product ID** window, click the **Activation Key** link.

4. On the web page that appears, copy the URL, and paste it into a web browser on a machine where an Internet connection can be established. The AgilePoint Activation page appears with the Product ID displayed.

   You can also access the AgilePoint Activation page via the following URL: `http://act.agilepoint.com/ActivationServer/ActivationKey.aspx`. If you choose this method, you must also type the Product ID.

5. Click **Submit** to get the activation key or download the activation key file.

   If this process fails to generate an Activation Key, send an e-mail with the following information to AgilePoint Customer Support:
   - Your name.
   - The name of your company or organization.
   - Appropriate contact information.
   - The Product ID specified by the Activation Wizard.

   AgilePoint will reply with the required Activation Key.

6. In the **Activation Wizard** window, in the **Activation Key** field, click the **Ellipses** button.

7. Select the activation key file you downloaded.

8. Click **Next**, and then click **Finish**.