



Upgrade Guide

AgilePoint BPMS v5.0 R2 SP1

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Preface

Disclaimer of Warranty

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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. To date, we have had no report of AgilePoint BPMS carries any virus. AgilePoint takes the following measures to ensure 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 deliverable package is scanned by anti-virus software before upload to our customer download site.

Document Revision Numbers

AgilePoint documentation uses the revision number format **rX.Y.Z**. The letters and numbers in this revision number can be interpreted as follows:

- **r** - Indicates "revision." This helps to differentiate the document *version* numbers, which start with **v**.
- **X** - The major version number for AgilePoint BPMS to which this document refers. For example, AgilePoint releases 5.0, 5.0 SP1, and 5.5 would all have an **X** value of **5**.
- **Y** - The major document revision number. This number typically changes only when either there is a new AgilePoint release, or there are major changes to the document.
- **Z** - The minor document revision number. This number is incremented each time the document is republished.

AgilePoint Documentation in PDF and HTML

AgilePoint documentation is provided in both print-friendly (PDF) and web-based (HTML) formats.

Advantages of HTML Documentation

- HTML is the **primary delivery format** for AgilePoint documentation.
- Unified, global **search** across all documentation. PDF documents allow you to search only within the context of a given PDF file.
- **All hyperlinks supported**. Links in PDFs are only supported in certain contexts.
- "One-stop shopping" for all information related to AgilePoint BPMS.
- The HTML documentation is updated more frequently than the PDF documentation. Web-based documentation is updated periodically between AgilePoint releases to address errors and omissions, but the PDF documentation is updated only at the time of a software release.

Advantages of PDF Documentation

PDFs can be more easily **printed**, **archived**, and **transferred** (such as by FTP or email) than HTML documentation.

For more information, see [Downloading Files and Sharing Links from the Documentation Library](#) in the [Documentation Library](#).

Opening the Documentation Library

To open the AgilePoint Documentation Library, do the following.

Prerequisites

You must have a valid account on the AgilePoint Support Portal.

Instructions

1. Log on to the AgilePoint Support Portal.
2. Click **Documentation**.
3. On the **Documentation** page, click the documentation library for your AgilePoint release.
 - For AgilePoint BPMS v5.0 SP1 and higher, the web-based documentation library opens in a new tab or window in your web browser.

- For releases prior to v5.0 SP1, a download starts for a Zip file with the PDF documentation for your release.

Finding Information in the Documentation Library

The information in this topic will help you to locate information in the AgilePoint Documentation Library.

Using the Table of Contents

The table of contents in the AgilePoint Documentation Library is divided by content areas. For example, the Installation section includes all the information you need to install AgilePoint BPMS. The AgilePoint API section includes information about the AgilePoint APIs.

You can use the Table of Contents to explore the AgilePoint documentation content and find the information you want.

Searching

The web-based documentation includes a centralized search for all documentation content. To search for information:

1. In the AgilePoint Documentation Library, click the **Search** tab. In the Search box, enter **1 search term**, and click **Search**.

The search results display in alphabetical order by topic title.

It is important to understand that the third-party software AgilePoint uses to generate web-based documentation allows only 1 search term. More than 1 search term will cause the search to fail.

AgilePoint recommends using a relatively unique search term to find the information you need. For example, entering a common term, such as "process," will return a high percentage of the total documentation topics in the search results.

2. Browse the list of topic titles to find the information you want.

Printing

The PDF documentation is provided mainly for the purpose of printing and archiving. To print a set of information:

1. Navigate to the main page of the Documentation Library from which you want to print.
2. In the list of documents, click the document name in the **PDF** column.
3. From your PDF reader software, print the portion of the document you want.

Downloading Files and Sharing Links from the Documentation Library

You can download and share files AgilePoint's documentation library as you would in any other web page. Note that if you send links to recipients, they must have a Support Portal login to view the file.

These procedures are common examples based on Internet Explorer with the Adobe Reader plug-in. Exact procedures may vary depending on your web browser, PDF viewer, and email client configuration.

Share a Link to an HTML Topic

1. Navigate to the topic you want to share.
2. Copy the URL in the Location box in your web browser.
3. Paste the URL in an email, IM client, etc.

Share a Link to a PDF Document

1. In Internet Explorer, navigate to the Documentation Library home page.
2. In the **PDF** column, right-click the name of the PDF file you want to share.
3. In the quick menu, click **Copy shortcut**.
4. Paste the URL in an email, IM client, etc.

Save a Copy of a PDF Document

1. In Internet Explorer, [open the Documentation Library home page](#).
2. In the **PDF** column, click the name of the PDF file you want to share.
3. In the Adobe Reader plug-in, click **Save** button.

Contacting AgilePoint Sales

AgilePoint is a leading Business Process Management System (BPMS) provider created by a team of driven people who strive to incorporate the principles of relentless innovation for the benefit of our customers. Our mission is to help companies of any size attain and sustain operational success through process excellence.

Headquarters: AgilePoint Corporation 1916C Old Middlefield Way Mountain View, CA 94043, USA

Tel: (650) 968 - 6789

Fax: (650) 968 - 6785

Email: info@agilepoint.com

Web site: www.agilepoint.com

International: For AgilePoint EMEA and AgilePoint Asia Pacific, please call the AgilePoint Corporate Office for contact information.

Contacting Customer Support

To contact AgilePoint Support, please submit a ticket on the AgilePoint Support Portal: <http://support.agilepoint.com/SupportPortal/>

If you do not have a Support Portal account, you can send an email to request one: support@agilepoint.com

Upgrade Guide

This section provides instructions for upgrading components of the AgilePoint BPMS Suite.



Note: Applying an AgilePoint upgrade will cause AgilePoint Server and other related services to stop.



Note: If you are planning to upgrade from an AgilePoint 3.x version, you will need to follow the special upgrade instructions here: <http://kb.agilepoint.com/KB/article.aspx?id=10415> . This will allow you to upgrade to the AgilePoint v4.0 platform where you can then upgrade to AgilePoint v5.0.

Upgrading from AgilePoint BPMS v4.x to BPMS v5.0

Use the instructions in this section if you already have AgilePoint BPMS v4.x Standard or Enterprise Edition installed in your environment, and you want upgrade to AgilePoint BPMS v5.0 Standard or Enterprise Edition

Perform/verify the following before applying the upgrade:

- Find the version number for your installed AgilePoint components:
 1. On the machine where your AgilePoint component is installed, in Windows navigate to **Add or Remove Programs**.
 2. Select the AgilePoint component for which you want the version number.
 3. Click the link, **Click here for Support Information**. The installed version appears on the pop-up window.
- Verify that AgilePoint v4.x is installed before applying this upgrade.
- Ensure you have your current AgilePoint Server license key.

During the upgrade, the installer will prompt you to reactivate AgilePoint Server. Reactivate AgilePoint Server using the existing AgilePoint Server license key.

For more information, see [Finding the License Key for an Installed AgilePoint Component](#) in the [Documentation Library](#).

- If you are upgrading AgilePoint SharePoint Integration v1, permission to access the SharePoint Integration database is required for the upgrade package to automatically update the changes in each AgilePoint-enabled SharePoint virtual server. If the SharePoint database is not accessible during the upgrade, see [Additional Steps for SharePoint Integration v1](#) in the [Documentation Library](#).



Note: This does not apply to AgilePoint Express.

Upgrade AgilePoint from v4.x to v5.0

1. Log on to Windows using a user login that belongs to the local system's Administrators group.
2. Verify that none of the following programs are running in your environment:
 - Microsoft Internet Explorer
 - Microsoft IIS (Internet Information Services) Management Console
 - Microsoft InfoPath
 - Microsoft Visio
 - Microsoft Visual Studio.NET
 - AgilePoint Envision
 - AgilePoint Developer

3. If AgilePoint Server is installed on the machine you are upgrading, stop the AgilePoint Server application until the upgrade is completed. Instructions for safely stopping the server can be found in the AgilePoint Server section of the AgilePoint User's Guide.
4. Back up the **web.config** file for Enterprise Manager. It is located in the virtual folder for the Enterprise Manager web application.
5. Uninstall previous version of Enterprise Manager via **Add/Remove Programs**.
6. Check to ensure that the root installation folder has been deleted. This folder must be deleted, and Add/Remove Programs does not delete it in all environments.
7. Uninstall the previous version of AgilePoint Developer via **Add/Remove Programs**.

 **Note:** This does not apply to AgilePoint Express.

8. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
9. Click the **Upgrade AgilePoint v4.x to v5.0** link.
10. Follow the on-screen instructions to complete the upgrade.
11. After the upgrade is finished, be sure to run the AgilePoint Server Configuration utility and click **OK** to update the database schema with any changes.

 **Note:** The Service Account for AgilePoint Server's Application Pool Identity/SQL User Account must have the db_owner role in order to update the database schema.

12. Follow the installation instructions in this document to install Enterprise Manager v5.0.
13. Replace the **web.config** file in the virtual folder for Enterprise Manager with the one you backed up.
14. Add the following entries to the **compilation** node in the **web.config** file.

```
<compilation defaultLanguage="c#" debug="true">
<assemblies>
<add assembly="Infragistics2.Shared.v8.1, Version=8.1.20081.1000,
  Culture=neutral, PublicKeyToken=7dd5c3163f2cd0cb"/>
<add assembly="Infragistics2.Win.UltraWinTree.v8.1, Version=8.1.20081.1000,
  Culture=neutral, PublicKeyToken=7dd5c3163f2cd0cb"/>
<add assembly="Infragistics2.WebUI.UltraWebTab.v8.1, Version=8.1.20081.1000,
  Culture=neutral, PublicKeyToken=7dd5c3163f2cd0cb"/>
<add assembly="Infragistics2.WebUI.UltraWebGrid.v8.1, Version=8.1.20081.1000,
  Culture=neutral, PublicKeyToken=7dd5c3163f2cd0cb"/>
<add assembly="Infragistics2.WebUI.Misc.v8.1, Version=8.1.20081.1000,
  Culture=neutral, PublicKeyToken=7dd5c3163f2cd0cb"/>
<add assembly="Infragistics2.WebUI.Shared.v8.1, Version=8.1.20081.1000,
  Culture=neutral, PublicKeyToken=7dd5c3163f2cd0cb"/>
<add assembly="Infragistics2.WebUI.UltraWebNavigator.v8.1,
  Version=8.1.20081.1000, Culture=neutral,
  PublicKeyToken=7dd5c3163f2cd0cb"/>
<add assembly="AjaxControlToolkit, Version=3.0.30512.20315, Culture=neutral,
  PublicKeyToken=28f01b0e84b6d53e" />
</assemblies>
</compilation>
```

15. Clear the AgilePoint Server cache folder at C:/AgilePoint/AgilePointServer/cache.

Additional Steps for SharePoint Integration v1



Note: This does not apply to AgilePoint Express.

If you are upgrading SharePoint Integration v1, do the following:

1. Permission to access the SharePoint Integration database is required for the upgrade package to automatically update the changes in each of the AgilePoint-enabled SharePoint Integration virtual servers. If the permission is not set, a message will appear after the upgrade that indicates the upgrade has been applied successfully, but errors occurred.

The following manual procedures are required:

- a. Open the SharePoint Configuration Manager and make a list of all the AgilePoint-enabled SharePoint virtual servers.
 - b. Copy all of the DLL files from C:\Program Files\AgilePoint\SharePoint[Version]\Template\layout\bin to the bin folder of each virtual server (e.g. C:\inetpub\wwwroot\wss\VirtualDirectories\8000\bin).
2. To activate the latest AgilePoint Web Parts for SharePoint, open the SharePoint Configuration Manager and make a list of all the AgilePoint Enabled SharePoint virtual servers.
 3. In a command prompt, navigate to C:\Program files\Common Files\Microsoft Shared\web server extensions\12\BIN folder and execute the following command repeatedly with the URLs in your virtual servers list to activate the Web Parts on each of the SharePoint virtual servers:

```
STSADM.EXE -o activatefeature -name AgilePointWebParts -url
[virtual server url] -force
```

Additional Steps for SharePoint Integration v2

If you are upgrading SharePoint Integration v2, a check box appears saying **I want to manually upgrade AgilePoint SharePoint Integration v2**. Do the following:



Note: If you upgrade SharePoint Integration automatically, it will cause SharePoint to shut down. If you install SharePoint Integration manually, SharePoint will not shut down, but there is a much higher probability of an error occurring. Therefore, in most cases AgilePoint recommends installing the SharePoint Integration upgrade automatically during non-peak hours.

- If you do not select the check box, the installer will update the solution files automatically.
- If you would prefer not to apply the Service Pack directly on the SharePoint machine, check the check box to manually upgrade the SharePoint Integration. To upgrade the SharePoint machine manually, right-click and extract the installer file to obtain the solution files (.wsp) files at Net20\SharePointv2\. Now upgrade the four solution files individually using the command line example below:

```
stsadm -o upgradesolution -name
Ascentn.SharePoint.SettingsList.wsp -filename
Ascentn.SharePoint.SettingsList.wsp -immediate
-allowgacdeployment
```

After upgrading the solution files, run this command:

```
stsadm -o copyappbincontent
```

Additional Manual Upgrade Steps

If you are upgrading from any release other than AgilePoint BPMS v4.7 SP2, you must perform the following manual upgrade steps if you intend to use the SharePoint ListForm or AgilePoint Data Services components.



Note: This does not apply to AgilePoint Express.

SharePoint ListForm

The SharePoint ListForm functionality requires you to manually deploy the solution to the desired Web application, and activate the feature using the following instructions:

Via Command Prompt

1. To deploy the solution to the SharePoint Web application via command prompt using STSADM in the folder C:\Program files\Common Files\Microsoft Shared\web server extensions\12\BIN:

```
stsadm.exe -o deploysolution -name Ascentn.SharePoint.ListForm.wsp  
-local -allowGacDeployment -url http://server_name
```

Resource: <http://technet.microsoft.com/en-us/library/cc262459.aspx>

2. To activate the feature on the selected SharePoint site:

```
stsadm.exe -o activatefeature -id  
4D377C46-F04A-4bea-8E2F-CFBDA11F390F -url  
http://server_name/siteCollectionUrl
```

(The ID above is specific to the ListForm feature.)

Resource: <http://technet.microsoft.com/en-us/library/cc262692.aspx>

Using SharePoint Central Administration

1. In SharePoint Central Administration, click **Operations > Solution Management**, and click on **ascentn.sharepoint.listform.wsp**.
2. Click **Deploy Solution** and choose the Web Application for which to deploy the solution.
3. On the SharePoint site, click **Site Settings > Site Collection Administration > Site Collection Features**, and activate the **AgilePoint ListForm** feature.

Data Services

(AgilePoint Data Services Users Only) After applying this Service Pack, the following manual steps are required for Data Services:

- Create a **WF_DATA_SERVICE_ERRORDB** table in the AgilePoint Tracking database (where the **WF_DATA_SERVICE_TEMPDB** table is present).
- For **MS SQL Server**: Open and run the **WF_DATA_SERVICE_ERRORDB.SQL** script file that can be found by extracting the **Service Pack .exe** at **Net20\Data Services\SQL**

- **For ORACLE:** Open and run the **WF_DATA_SERVICE.SQL** script file that can be found by extracting the **Service Pack .exe** at **Net20\Data Services\SQL** to create **WF_DATA_SERVICE_ERRORDB** table.
- Open the **DataServicesWindowsService.exe.config** file and update the following key value under **<appSettings>**:

```
<add key="ErrorDbConnectionString"
      value="server=[hostname];database=
      AgilePointTracking;trusted_Connection=yes"/>
```



Note: If the above manual steps are not followed, the AgilePoint Data Services will fail after applying this Service Pack. The database tables have been added as a fail over mechanism for bad data in the process.

Upgrading from AgilePoint BPMS v5.0 to BPMS v5.0 SP1

Use the instructions in this section if you already have AgilePoint BPMS v5.0 Standard or Enterprise Edition installed in your environment, and you want upgrade to AgilePoint BPMS v5.0 SP1 Standard or Enterprise Edition

Perform/verify the following before applying the upgrade:



Note: Apply the Service Pack to all machines where any AgilePoint components are installed.

Before applying this Service Pack, it is very important to do the following:

1. Ensure that AgilePoint v5.0 is installed before applying this Service Pack.
2. Applying this Service Pack will cause AgilePoint Server and other related services to restart.
3. If you are upgrading your AgilePoint SharePoint Integration v1, permission to access the SharePoint Integration database is required for the service pack installer to automatically upgrade the changes in each AgilePoint-enabled SharePoint virtual server. If the SharePoint database is not accessible during the upgrade, see [Additional Steps for SharePoint Integration v1](#).
4. The "I want to manually upgrade AgilePoint SharePoint Integration v2" check box will appear only if the AgilePoint SharePoint Integration v2 is installed on the SharePoint machine.

Do one of the following:

- a. Do not check the check box, the installer will update the solution files automatically.
- b. If you would prefer not to apply the Service Pack directly on the SharePoint machine, check the check box to manually upgrade the SharePoint Integration. To upgrade the SharePoint machine manually, right-click and extract the installer file to obtain the solution files (.wsp) files at Net20\SharePointv2\. Now upgrade the 4 solution files (Ascentn.SharePoint.SettingsList.wsp, Ascentn.SharePoint.WebParts.wsp, Ascentn.SharePoint.WFIntegration.wsp, Ascentn.SharePoint.ListForm.wsp) individually using the command line example below:

```
stsadm -o upgradesolution -name
    Ascentn.SharePoint.SettingsList.wsp -filename
    Ascentn.SharePoint.SettingsList.wsp -immediate
    -allowgacdeployment
```

After upgrading the solution files, run this command:

```
stsadm -o copyappbincontent
```

5. (AgilePoint Data Services Users Only) After applying this Service Pack, the following manual steps are required for Data Services:

Open the file **DataServiceConfiguration.exe** file from the root Data Services folder. On the AgilePoint Data Services Configuration window, click **OK**.



Note: This action causes the length of the WORK_OBJECT_ID column in the tables WF_DATA_SERVICE_ERRORDB and WF_DATA_SERVICE_TEMPDB to be increased from 50 to 256. If you do not complete this action, errors may occur.

Upgrading from AgilePoint BPMS v5.0 to BPMS v5.0 SP2

Use the instructions in this section if you already have AgilePoint BPMS v5.0 Standard or Enterprise Edition installed in your environment, and you want upgrade to AgilePoint BPMS v5.0 SP2 Standard or Enterprise Edition



Note: Apply the Service Pack to all machines where any AgilePoint components are installed.



Note: This does not apply if you are using AgilePoint BPMS for .NET 4.0.

Before Applying the Service Pack

1. Find the version number for your installed AgilePoint components:
 - a. On the machine where your AgilePoint component is installed, in Windows navigate to **Add or Remove Programs**.
 - b. Select the AgilePoint component for which you want the version number.
 - c. Click the link, **Click here for Support Information**. The installed version appears on the pop-up window.
2. Verify that AgilePoint v5.0 is installed on your machines.
3. Applying this Service Pack will cause AgilePoint Server and other related services to restart.
4. If you are upgrading your AgilePoint SharePoint Integration v1, permission to access the SharePoint Integration database is required for the service pack installer to automatically upgrade the changes in each AgilePoint-enabled SharePoint virtual server. If the SharePoint database is not accessible during the upgrade, see [Additional Steps for SharePoint Integration v1](#) in the [Documentation Library](#).

Applying the Service Pack

1. Run the upgrade installer.
2. The **I want to manually upgrade AgilePoint SharePoint Integration v2** check box will appear only if the AgilePoint SharePoint Integration v2 is installed on the SharePoint machine.

Do one of the following:

- a. Do not check the check box, the installer will update the solution files automatically.
- b. If you would prefer not to apply the Service Pack directly on the SharePoint machine, check the check box to manually upgrade the SharePoint Integration. To upgrade the SharePoint machine manually, right-click and extract the installer file to obtain the solution files (.wsp) files at Net20\SharePointv2\. Now upgrade the 4 solution files (Ascentn.SharePoint.SettingsList.wsp, Ascentn.SharePoint.WebParts.wsp, Ascentn.SharePoint.WFIntegration.wsp, Ascentn.SharePoint.ListForm.wsp) individually using the command line example below:

```
stsadm -o upgradesolution -name
    Ascentn.SharePoint.SettingsList.wsp -filename
    Ascentn.SharePoint.SettingsList.wsp -immediate
    -allowgacdeployment
```

After upgrading the solution files, run this command:

```
stsadm -o copyappbincontent
```

After Applying the Service Pack

This step is applicable only to AgilePoint Data Services Users on AgilePoint BPMS v5.0. If you are already using AgilePoint BPMS v5.0 SP1, you do not need to complete this step.

1. Open the file **DataServiceConfiguration.exe** file from the root Data Services folder.
2. On the AgilePoint Data Services Configuration window, click **OK**.



Note: This action causes the length of the WORK_OBJECT_ID column in the tables WF_DATA_SERVICE_ERRORDB and WF_DATA_SERVICE_TEMPDB to be increased from 50 to 256. If you do not complete this action, errors may occur.

InfoPath Client Integration

FIX 05.0001 requires you to reinstall the AgilePoint InfoPath Client Integration. Please contact AgilePoint support for the updated installer.

Note that this refers only to InfoPath **Client** Integration, **not** server-side integration. A small minority of AgilePoint customers use InfoPath Client Integration, so this is not a common scenario.

Upgrading from AgilePoint BPMS v5.0 to BPMS v5.0 SP3

Use the instructions in this section if you already have AgilePoint BPMS v5.0, v5.0 SP1, or v5.0 SP2 Standard or Enterprise Edition installed in your environment, and you want upgrade to AgilePoint BPMS v5.0 SP3 Standard or Enterprise Edition

Running the Upgrade Installer

To run the AgilePoint BPMS Upgrade Installer, do the following.

Prerequisites

- Verify that AgilePoint v5.0, v5.0 SP1, or v5.0 SP2 is installed on your machines. If you are performing an upgrade following a new installation, ensure you have installed all the components on all machines first before starting the upgrade.

To find the version number for your installed AgilePoint components:

- On the machine where your AgilePoint component is installed, in Windows navigate to **Add or Remove Programs**.
 - Select the AgilePoint component for which you want the version number.
 - Click the link, **Click here for Support Information**. The installed version appears on the pop-up window.
- Applying this Service Pack will cause AgilePoint Server and other related services to restart. Ensure you perform the upgrade at times when these restarts will have minimal impact on your operations.
 - If you are upgrading your AgilePoint SharePoint Integration v1, permission to access the SharePoint Integration database is required for the service pack installer to automatically upgrade the changes in each AgilePoint-enabled SharePoint virtual server. If the SharePoint database is not accessible during the upgrade, see [Additional Steps for SharePoint Integration v1](#).

Instructions

On every machine with AgilePoint client or server components installed:

- Open the upgrade installer file.
- If the AgilePoint SharePoint Integration v2 is installed on the SharePoint machine, complete the following field as desired.

Field Name	Definition
I want to manually upgrade AgilePoint SharePoint Integration v2	<p>Specifies one of the following:</p> <ul style="list-style-type: none"> Deselected - (Default) The SharePoint Integration solution files are updated automatically with no further intervention from you.

Field Name	Definition
	<ul style="list-style-type: none"> • Selected - The installer does not upgrade the SharePoint Integration solution files. You must upgrade them manually using the stsadm command line tool.

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

Updating the Database Schema for AgilePoint Server

To complete your AgilePoint upgrade, you must open the AgilePoint Server Manager to update the database schema.

Prerequisites

- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. Click **OK**.

Updating the Database Schema for AgilePoint Data Services

To update the database for AgilePoint Data Services, do the following.

Prerequisites

- AgilePoint BPMS v5.0 installed.
This does not apply to v5.0 SP1 or higher.
- AgilePoint Data Services installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file **[AgilePoint Data Services installation folder]\DataServiceConfiguration.exe**.
2. Click **OK**.

Updating the Database Schema for AgileReports

To update the database for AgileReports, do the following.

Prerequisites

- AgileReports installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file **[AgilePoint Server installation folder]\AgileReports\bin\ahDbAdmin.exe**.
2. On the **Logi 10 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: **[AgilePoint Server installation folder]\AgileReports**.
5. Click **OK**.
6. Click **Manage an Instance**.
7. Click **Upgrade Instance**.
8. Under **Metadata Database**, click **Update**.
9. Click **Close**.

Updating the Database Schema for AgileForms

To update the database for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.

Instructions

1. On the AgileForms Server machine, click **Start > All Programs > AgilePoint > AgileForms > AgileForms Configuration**.
2. Log on as required.
3. Click the **Database** tab.
4. Select **Run Database Scripts**.
5. Click **OK**.

Updating the AgileForms Help Link

When you upgrade AgileForms, you must manually update the URL for the AgileForms online help. The updated link provides an entirely updated online help system, which is important for AgileForms users.

To update the help link for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.

Navigation

1. On the AgileForms Server machine, open the file [\[AgileForms Server installation folder\]\FS2\Overrides.txt](#)

Instructions

1. In the file Overrides.txt, modify the value of the following property.

Field Name	New Value
Forms/AF/help_url	http://agileformshelp.agilepoint.com/

2. Save and close Overrides.txt.

Manually Upgrading SharePoint Integration v2 Using STSADM

If you meet the prerequisites in this topic, you must manually upgrade AgilePoint SharePoint Integration. This topic describes the manual upgrade procedure using the stsadm command line tool.

Prerequisites

- AgilePoint SharePoint Integration v2 installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.
- When upgrading AgilePoint BPMS, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration v2.**

Instructions

On the primary SharePoint server machine, do the following.

1. On a machine where you extracted the AgilePoint Upgrade installer, navigate to the folder [AgilePoint installer files]\Net20\SharePointv2\.
2. Copy the following files to your primary SharePoint server machine:
 - Ascentn.SharePoint.SettingsList.wsp

- Ascentn.SharePoint.WebParts.wsp
- Ascentn.SharePoint.WFIntegration.wsp
- Ascentn.SharePoint.ListForm.wsp
- Ascentn.SharePoint.WebParts_XRM.wsp (AgileXRM only)
- FirmstepSharepointConnector.wsp (AgileForms only)

3. Open the **stsadm** command line tool.

- **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN\stsadm.exe
- **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN\stsadm.exe

4. In **stsadm**, run the following commands to upgrade the solution files:

SharePoint Integration for AgileXRM only:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts_XRM.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts_XRM.wsp" -immediate
  -allowgacdeployment -allowcaspolices
```

SharePoint Integration for AgilePoint:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.SettingsList.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.SettingsList.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WFIntegration.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WFIntegration.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.ListForm.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.ListForm.wsp" -immediate
  -allowgacdeployment
```

SharePoint Integration for AgileForms only:

```
stsadm -o upgradesolution -name "FirmstepSharepointConnector.wsp"
  -filename "[AgileForms Integration for SharePoint installation
  folder]\FirmstepSharepointConnector.wsp" -immediate
  -allowgacdeployment
```

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

```
stsadm -o copyappbincontent
```

Installing InfoPath Client Integration

If you meet the prerequisites in this topic, you must install InfoPath Client Integration. This does not apply to InfoPath server-side integration.

Prerequisites

- You are using InfoPath Client Integration.
A small minority of AgilePoint customers use InfoPath Client Integration, so this is not a common scenario.
- You are upgrading to AgilePoint BPMS v5.0 SP3 from one of the following versions:
 - v5.0
 - v5.0 SP1No action is required for v5.0 SP2.
- You have applied the AgilePoint BPMS v5.0 SP3 Service Pack on all applicable AgilePoint machines.

Instructions

1. [Contact AgilePoint Support](#) to download the latest InfoPath Client Integration installation software.
2. Follow the instructions from AgilePoint Support to install the software.

Upgrading from AgilePoint BPMS v5.0 (SPx) to BPMS v5.0 SP4

Use the instructions in this section if you already have installed in your environment AgilePoint BPMS v5.0, or v5.0 SP1, SP2, or SP3 Standard or Enterprise Edition for .NET 3.5 or .NET 4.0, and you want upgrade to AgilePoint BPMS v5.0 SP4 Standard or Enterprise Edition for .NET 3.5 or 4.0.

Running the Upgrade Installer

To run the AgilePoint BPMS Upgrade Installer, do the following.

Prerequisites

- Verify that AgilePoint v5.0, v5.0 SP1, v5.0 SP2, or v5.0 SP3 is installed on your machines. If you are performing an upgrade following a new installation, ensure you have installed all the components on all machines first before starting the upgrade.

To find the version number for your installed AgilePoint components:

1. On the machine where your AgilePoint component is installed, in Windows navigate to **Add or Remove Programs**.
 2. Select the AgilePoint component for which you want the version number.
 3. Click the link, **Click here for Support Information**. The installed version appears on the pop-up window.
- Applying this Service Pack will cause AgilePoint Server and other related services to restart. Ensure you perform the upgrade at times when these restarts will have minimal impact on your operations.
 - If you are upgrading your AgilePoint SharePoint Integration v1, permission to access the SharePoint Integration database is required for the service pack installer to automatically upgrade the changes in each AgilePoint-enabled SharePoint virtual server. If the SharePoint database is not accessible during the upgrade, see [Additional Steps for SharePoint Integration v1](#).

Instructions

On every machine with AgilePoint client or server components installed:

1. Open the upgrade installer file.
2. If the AgilePoint SharePoint Integration v2 is installed on the SharePoint machine, complete the following field as desired.

Field Name	Definition
I want to manually upgrade AgilePoint SharePoint Integration v2	<p>Specifies one of the following:</p> <ul style="list-style-type: none"> • Deselected - (Default) The SharePoint Integration solution files are updated automatically with no further intervention from you.

Field Name	Definition
	<ul style="list-style-type: none"> • Selected - The installer does not upgrade the SharePoint Integration solution files. You must upgrade them manually using the stsadm command line tool.

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

Updating the Database Schema for AgilePoint Server - Windows Service Mode

To complete your AgilePoint upgrade, you must open the AgilePoint Server Manager to update the database schema. This procedure applies to AgilePoint Server running in Windows Service mode.

Prerequisites

- AgilePoint Server running in Windows Service mode.
- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.

Navigation

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**.

Instructions

On the AgilePoint Server machine, repeat the following procedure for each AgilePoint Server instance in your environment.

1. In the **AgilePoint Server Manager**, select the AgilePoint Server instance you want.
2. Click the server configuration button.
3. Click **OK**.

Updating the Database Schema for AgilePoint Server - IIS Mode

To complete your AgilePoint upgrade, you must open the AgilePoint Server Manager to update the database schema. This procedure applies to AgilePoint Server running in IIS mode.

Prerequisites

- AgilePoint Server running in IIS mode.
- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. Click **OK**.

Enabling AgileConnectors in an NLB Environment

To complete your AgilePoint upgrade in an NLB environment, you can enable the ADSyncModule and EventServices AgileConnectors on all AgilePoint Servers.

Prerequisites

- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.
- AgilePoint Server is running in an NLB environment.
- You previously configured AgilePoint Server in your NLB environment so that the ADSyncModule or EventServices AgileConnectors were active on only the primary AgilePoint Server machine.
- You want to use one or both of these AgileConnectors, and you want them to be NLB-enabled.

Instructions

On the AgilePoint machines that are not the primary machine:

- [Enable the ADSyncModule AgileConnector](#)
- [Enable the EventServices AgileConnector](#)

Updating the Database Schema for AgilePoint Data Services

To update the database for AgilePoint Data Services, do the following.

Prerequisites

- AgilePoint BPMS v5.0 installed.
This does not apply to v5.0 SP1 or higher.
- AgilePoint Data Services installed.
- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file [\[AgilePoint Data Services installation folder\]\DataServiceConfiguration.exe](#).
2. Click **OK**.

Updating the Database Schema for AgileReports

To update the database for AgileReports, do the following.

Prerequisites

- AgileReports installed.
- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file **[AgilePoint Server installation folder]\AgileReports\bin\ahDbAdmin.exe**.
2. On the **Logi 10 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: **[AgilePoint Server installation folder]\AgileReports**.
5. Click **OK**.
6. Click **Manage an Instance**.
7. Click **Upgrade Instance**.
8. Under **Metadata Database**, click **Update**.
9. Click **Close**.

Updating the Database Schema for AgileForms

To update the database for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.

Instructions

1. On the AgileForms Server machine, click **Start > All Programs > AgilePoint > AgileForms > AgileForms Configuration**.
2. Log on as required.
3. Click the **Database** tab.
4. Select **Run Database Scripts**.
5. Click **OK**.

Updating the AgileForms Help Link

When you upgrade AgileForms, you must manually update the URL for the AgileForms online help. The updated link provides an entirely updated online help system, which is important for AgileForms users.

To update the help link for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.

Navigation

1. On the AgileForms Server machine, open the file [\[AgileForms Server installation folder\]\FS2\Overrides.txt](#)

Instructions

1. In the file Overrides.txt, modify the value of the following property.

Field Name	New Value
Forms/AF/help_url	http://agileformshelp.agilepoint.com/

2. Save and close Overrides.txt.

Manually Upgrading SharePoint Integration v2 Using STSADM

If you meet the prerequisites in this topic, you must manually upgrade AgilePoint SharePoint Integration. This topic describes the manual upgrade procedure using the stsadm command line tool.

Prerequisites

- AgilePoint SharePoint Integration v2 installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.
- When upgrading AgilePoint BPMS, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration v2**.

Instructions

On the primary SharePoint server machine, do the following.

1. On a machine where you extracted the AgilePoint Upgrade installer, navigate to the folder [AgilePoint installer files]\Net20\SharePointv2\.
2. Copy the following files to your primary SharePoint server machine:
 - Ascentn.SharePoint.SettingsList.wsp
 - Ascentn.SharePoint.WebParts.wsp
 - Ascentn.SharePoint.WFIntegration.wsp
 - Ascentn.SharePoint.ListForm.wsp
 - Ascentn.SharePoint.WebParts_XRM.wsp (AgileXRM only)
 - FirmstepSharepointConnector.wsp (AgileForms only)

3. Open the **stsadm** command line tool.

- **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN\stsadm.exe
- **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN\stsadm.exe

4. In **stsadm**, run the following commands to upgrade the solution files:

SharePoint Integration for AgileXRM only:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts_XRM.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts_XRM.wsp" -immediate
  -allowgacdeployment -allowcaspolices
```

SharePoint Integration for AgilePoint:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.SettingsList.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.SettingsList.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WFIntegration.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WFIntegration.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.ListForm.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.ListForm.wsp" -immediate
  -allowgacdeployment
```

SharePoint Integration for AgileForms only:

```
stsadm -o upgradesolution -name "FirmstepSharepointConnector.wsp"
  -filename "[AgileForms Integration for SharePoint installation
  folder]\FirmstepSharepointConnector.wsp" -immediate
  -allowgacdeployment
```

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

```
stsadm -o copyappbincontent
```

Installing InfoPath Client Integration

If you meet the prerequisites in this topic, you must install InfoPath Client Integration. This does not apply to InfoPath server-side integration.

Prerequisites

- You are using InfoPath Client Integration.
A small minority of AgilePoint customers use InfoPath Client Integration, so this is not a common scenario.
- You are upgrading to AgilePoint BPMS v5.0 SP4 from one of the following versions:
 - v5.0
 - v5.0 SP1No action is required for v5.0 SP2 or SP3.
- You have applied the AgilePoint BPMS v5.0 SP4 Service Pack on all applicable AgilePoint machines.

Instructions

1. Contact AgilePoint Support to download the latest InfoPath Client Integration installation software.
For more information, see [Contacting AgilePoint Sales](#).
2. Follow the instructions from AgilePoint Support to install the software.

Upgrading from AgilePoint BPMS v5.0 (SPx) to BPMS v5.0 R2

Use the instructions in this section if you already have installed in your environment AgilePoint BPMS v5.0, or v5.0 SP1, SP2, SP3, or SP4 Standard or Enterprise Edition for .NET 3.5 or .NET 4.0, or v5.0 SP4 Genesis Edition, and you want upgrade to AgilePoint BPMS v5.0 R2 Standard or Enterprise Edition for .NET 3.5 or 4.0, or v5.0 R2 Genesis Edition.

Running the Upgrade Installer

To run the AgilePoint BPMS Upgrade Installer, do the following.

Prerequisites

- Verify that AgilePoint v5.0, v5.0 SP1, v5.0 SP2, v5.0 SP3, or v5.0 SP4 is installed on your machines. If you are performing an upgrade following a new installation, ensure you have installed all the components on all machines first before starting the upgrade.

To find the version number for your installed AgilePoint components:

1. On the machine where your AgilePoint component is installed, in Windows navigate to **Add or Remove Programs**.
 2. Select the AgilePoint component for which you want the version number.
 3. Click the link, **Click here for Support Information**. The installed version appears on the pop-up window.
- Applying this Service Pack will cause AgilePoint Server and other related services to restart. Ensure you perform the upgrade at times when these restarts will have minimal impact on your operations.
 - If you are upgrading your AgilePoint SharePoint Integration v1, permission to access the SharePoint Integration database is required for the service pack installer to automatically upgrade the changes in each AgilePoint-enabled SharePoint virtual server. If the SharePoint database is not accessible during the upgrade, see [Additional Steps for SharePoint Integration v1](#).

Instructions

On every machine with AgilePoint client or server components installed:

1. Open the upgrade installer file.
2. If the AgilePoint SharePoint Integration v2 is installed on the SharePoint machine, complete the following field as desired.

Field Name	Definition
I want to manually upgrade AgilePoint SharePoint Integration v2	Specifies one of the following: <ul style="list-style-type: none"> • Deselected - (Default) The SharePoint Integration solution files are updated automatically with no further intervention from you.

Field Name	Definition
	<ul style="list-style-type: none"> • Selected - The installer does not upgrade the SharePoint Integration solution files. You must upgrade them manually using the stsadm command line tool.

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

Updating AgilePoint Server Manager - Windows Service Mode

To complete your AgilePoint upgrade, you must open the AgilePoint Server Manager to update the database schema.

Prerequisites

- AgilePoint Server running in Windows Service mode.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.

Good to Know

- These instructions do not cover additional configuration changes in AgilePoint Server Manager. They assume you are performing a base upgrade with no additional configuration changes.

For more information about configuring AgilePoint Server using the AgilePoint Server Manager, see [AgilePoint Server Manager](#).

Navigation

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**.

Instructions

On the AgilePoint Server machine, repeat the following procedure for each AgilePoint Server instance in your environment.

1. In the **AgilePoint Server Manager**, select the AgilePoint Server instance you want.
2. Click **Server Configuration** .

The **AgilePoint Server Configuration Utility** window opens.
3. On the **AgilePoint Server Configuration Utility** window, click **OK**.

This updates the database schema and closes the **AgilePoint Server Configuration Utility** window.
4. On the **AgilePoint Server Manager** window, in the **Password** field, enter the password for your AgilePoint Service Account.
5. Click **Update**.

If any additional validation errors occur, resolve them, and then click **Update**.

Running the SVC Client Utility Tool

Once you have upgraded to AgilePoint BPMS v5.0 R2, you must run the SVC Client Utility Tool on each instance of AgilePoint Enterprise Manager in your environment.

This topic provides the standard instructions for running the SVC Client Utility on any ASP.NET web application.

Prerequisites

- AgilePoint Server running in Windows Service mode.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.
- You have [updated your AgilePoint Server instances](#).
- Create a backup copy of the configuration file for the application you are configuring before using this utility.
- If you are using SharePoint or AgileForms Server on a machine that is not the AgilePoint Server machine (typically the case), copy the **web.config** file from the SharePoint or AgileForms machine to AgilePoint Server machine. The following are the default locations of the target web.config files:
 - **SharePoint** - c:\inetpub\wwwroot\wss\VirtualDirectories\[port number]
 - **AgileForms** - [AgileForms Server installation folder]\Webroot

Navigation

Do one of the following:

1. On the AgilePoint Server machine, navigate to **[AgilePoint Server Installation]\SVCUtilityTool\AgilePointWindowsServiceClientUtilityTool.exe**
2. Open the AgilePoint installation file, and click **Utilities and Other Support Files > AgilePoint Windows Service Client Utility Tool**.

Instructions

1. In the AgilePoint Windows Service Client Utility Tool dialog box, complete the following fields:
 - **Service Address** – The URI for the Windows Service for which you are creating the binding. The information required to build this URI is provided in the AgilePoint Server Manager window.
 - **HTTP** - http://[APServer Machine Name]: [Http Port]/AgilePointServer

When you create the bindings for the web application, the settings are automatically configured in the web.config file for both HTTP and TCP protocols. By default, the HTTP bindings are used. However, you can switch to TCP by modifying the following properties in the web.config:

- Change the following so value="**NetTcpBinding_IWCFWorkflowService**"

```
<add key="WorkFlowBindingUsed" value="WSHttpBinding_IWCFWorkflowService" />
```

- Change the following so value="**NetTcpBinding_IWCFEventServices**"

```
<add key="EventServicesBindingUsed" value="WSHttpBinding_IWCFEventServices" />
```

- Change the following so value="**NetTcpBinding_IWCFAdminService**"

```
<add key="AdminBindingUsed" value="WSHttpBinding_IWCFAdminService" />
```

- **Target Config** – The file name and location of the configuration file for the application you are configuring. This is required for SharePoint Integration. For other applications, you only need to run this utility if you are prompted.
 - **SharePoint Integration** – The web.config for the SharePoint web application you want to bind.
 - **Enterprise Manager** – The web.config for the Enterprise Manager web application.
 - **Data Services** – DataServicesWindowsService.exe.config in the Data Services installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Data Services\
 - **AgileForms** - The web.config file in the AgileForms installation folder. The default location is C:\Program Files\AgilePoint\AgileForms Server\Webroot
 - **Deployment Service** - apds.exe.config file in the Deployment Service installation folder. The default location is C:\Program Files (x86)\AgilePoint\AgilePoint Deployment Service\
 - 2. Click **Settings** to configure the following fields:
 - **Max Buffer Size**
 - **Max Buffer Pool Size**
 - **Max Received Message Size**
 - **Max String Content Length**
 - **Max Array Length**
- Guidance for modifying these values can be found at the following articles on MSDN:
- [http://msdn.microsoft.com/en-us/library/ms731361\(v=VS.100\).aspx](http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx)
 - [http://msdn.microsoft.com/en-us/library/ms731325\(v=VS.100\).aspx](http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx)
3. If you are using SharePoint or AgileForms Server on a machine that is not the AgilePoint Server machine, copy the modified web.config file back to its original location on the SharePoint or AgileForms Server machine.

Updating the Database Schema for AgilePoint Server - IIS Mode

To complete your AgilePoint upgrade, you must open the AgilePoint Server Manager to update the database schema. This procedure applies to AgilePoint Server running in IIS mode.

Prerequisites

- AgilePoint Server running in IIS mode.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. Click **OK**.

Enabling AgileConnectors in an NLB Environment

To complete your AgilePoint upgrade in an NLB environment, you can enable the ADSyncModule and EventServices AgileConnectors on all AgilePoint Servers.

Prerequisites

- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.
- AgilePoint Server is running in an NLB environment.
- You previously configured AgilePoint Server in your NLB environment so that the ADSyncModule or EventServices AgileConnectors were active on only the primary AgilePoint Server machine.
- You want to use one or both of these AgileConnectors, and you want them to be NLB-enabled.

Instructions

On the AgilePoint machines that are not the primary machine:

- [Enable the ADSyncModule AgileConnector](#)
- [Enable the EventServices AgileConnector](#)

Updating the Database Schema for AgilePoint Data Services

To update the database for AgilePoint Data Services, do the following.

Prerequisites

- AgilePoint BPMS v5.0 installed.
This does not apply to v5.0 SP1 or higher.
- AgilePoint Data Services installed.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file [\[AgilePoint Data Services installation folder\]\DataServiceConfiguration.exe](#).
2. Click **OK**.

Updating the Database Schema for AgileReports

To update the database for AgileReports, do the following.

Prerequisites

- AgileReports installed.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file **[AgilePoint Server installation folder]\AgileReports\bin\ahDbAdmin.exe**.
2. On the **Logi 10 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: **[AgilePoint Server installation folder]\AgileReports**.
5. Click **OK**.
6. Click **Manage an Instance**.
7. Click **Upgrade Instance**.
8. Under **Metadata Database**, click **Update**.
9. Click **Close**.

Updating the Database Schema for AgileForms

To update the database for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.

Instructions

1. On the AgileForms Server machine, click **Start > All Programs > AgilePoint > AgileForms > AgileForms Configuration**.
2. Log on as required.
3. Click the **Database** tab.
4. Select **Run Database Scripts**.
5. Click **OK**.

Updating the AgileForms Help Link

When you upgrade AgileForms, you must manually update the URL for the AgileForms online help. The updated link provides an entirely updated online help system, which is important for AgileForms users.

To update the help link for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.

Navigation

1. On the AgileForms Server machine, open the file [\[AgileForms Server installation folder\]\FS2\Overrides.txt](#)

Instructions

1. In the file Overrides.txt, modify the value of the following property.

Field Name	New Value
Forms/AF/help_url	http://agileformshelp.agilepoint.com/

2. Save and close Overrides.txt.

Manually Upgrading SharePoint Integration v2 Using STSADM

If you meet the prerequisites in this topic, you must manually upgrade AgilePoint SharePoint Integration. This topic describes the manual upgrade procedure using the stsadm command line tool.

Prerequisites

- AgilePoint SharePoint Integration v2 installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.
- When upgrading AgilePoint BPMS, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration v2**.

Instructions

On the primary SharePoint server machine, do the following.

1. On a machine where you extracted the AgilePoint Upgrade installer, navigate to the folder [AgilePoint installer files]\Net20\SharePointv2\.
2. Copy the following files to your primary SharePoint server machine:
 - Ascentn.SharePoint.SettingsList.wsp
 - Ascentn.SharePoint.WebParts.wsp
 - Ascentn.SharePoint.WFIntegration.wsp
 - Ascentn.SharePoint.ListForm.wsp
 - Ascentn.SharePoint.WebParts_XRM.wsp (AgileXRM only)
 - FirmstepSharepointConnector.wsp (AgileForms only)

3. Open the **stsadm** command line tool.

- **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN\stsadm.exe
- **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN\stsadm.exe

4. In **stsadm**, run the following commands to upgrade the solution files:

SharePoint Integration for AgileXRM only:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts_XRM.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts_XRM.wsp" -immediate
  -allowgacdeployment -allowcaspolices
```

SharePoint Integration for AgilePoint:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.SettingsList.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.SettingsList.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WFIntegration.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WFIntegration.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.ListForm.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.ListForm.wsp" -immediate
  -allowgacdeployment
```

SharePoint Integration for AgileForms only:

```
stsadm -o upgradesolution -name "FirmstepSharepointConnector.wsp"
  -filename "[AgileForms Integration for SharePoint installation
  folder]\FirmstepSharepointConnector.wsp" -immediate
  -allowgacdeployment
```

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

```
stsadm -o copyappbincontent
```

Manually Upgrading SharePoint Integration v2 Using PowerShell

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

Prerequisites

- AgilePoint SharePoint Integration v2 installed.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.
- When upgrading AgilePoint BPMS, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration v2**.

Instructions

1. On a machine where you extracted the AgilePoint Upgrade installer, navigate to the folder [AgilePoint installer files]\Net20\SharePointv2\.
2. Copy the following files to your primary SharePoint server machine:
 - Ascentn.SharePoint.SettingsList.wsp
 - Ascentn.SharePoint.WebParts.wsp
 - Ascentn.SharePoint.WFIntegration.wsp
 - Ascentn.SharePoint.ListForm.wsp
 - Ascentn.SharePoint.WebParts_XRM.wsp (AgileXRM only)
 - FirmstepSharepointConnector.wsp (AgileForms only)
3. 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
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.SettingsList.wsp"
-GACDeployment -FullTrustBinDeployment
```

```
Update-SPSolution -Identity Ascentn.SharePoint.WebParts.wsp -LiteralPath
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.WebParts.wsp"
-GACDeployment -FullTrustBinDeployment
```

```
Update-SPSolution -Identity Ascentn.SharePoint.WFIntegration.wsp -LiteralPath
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.WFIntegration.wsp"
-GACDeployment -FullTrustBinDeployment
```

```
Update-SPSolution -Identity Ascentn.SharePoint.ListForm.wsp -LiteralPath
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.ListForm.wsp"
-GACDeployment -FullTrustBinDeployment
```

SharePoint Integration for AgileForms only:

```
Update-SPSolution -Identity FirmstepSharepointConnector.wsp -LiteralPath
"[AgileForms Integration for SharePoint installation
folder]\FirmstepSharepointConnector.wsp"
-GACDeployment -FullTrustBinDeployment
```

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

```
Install-SPApplicationContent
```

6. Do one of the following:
 - For AgilePoint Server running in IIS mode, reset IIS.
 - For AgilePoint Server running in Windows Service mode:
 1. Stop IIS.
 2. Restart the Windows service for the AgilePoint Server instance.
 3. Start IIS.

Installing InfoPath Client Integration

If you meet the prerequisites in this topic, you must install InfoPath Client Integration. This does not apply to InfoPath server-side integration.

Prerequisites

- You are using InfoPath Client Integration.
A small minority of AgilePoint customers use InfoPath Client Integration, so this is not a common scenario.
- You are upgrading to AgilePoint BPMS v5.0 SP4 from one of the following versions:
 - v5.0
 - v5.0 SP1No action is required for v5.0 SP2 or higher.
- You have applied the AgilePoint BPMS v5.0 R2 upgrade on all applicable AgilePoint machines.

Instructions

1. Contact AgilePoint Support to download the latest InfoPath Client Integration installation software.
For more information, see [Contacting AgilePoint Sales](#).
2. Follow the instructions from AgilePoint Support to install the software.

Upgrading from AgilePoint BPMS v5.0 (SPx or Rx) to BPMS v5.0 R2 SP1

Use the instructions in this section if you already have installed in your environment AgilePoint BPMS v5.0, or v5.0 SP1, SP2, SP3, SP4, or R2 Standard or Enterprise Edition for .NET 3.5 or .NET 4.0, or v5.0 SP4, or R2 Genesis Edition, and you want upgrade to AgilePoint BPMS v5.0 R2 SP1 Standard or Enterprise Edition for .NET 3.5 or 4.0, or v5.0 R2 SP1 Genesis Edition.

Running the Upgrade Installer

To run the AgilePoint BPMS Upgrade Installer, do the following.

Prerequisites

- Verify that AgilePoint v5.0, v5.0 SP1, v5.0 SP2, v5.0 SP3, v5.0 SP4, or v5.0 R2 is installed on your machines. If you are performing an upgrade following a new installation, ensure you have installed all the components on all machines first before starting the upgrade.

To find the version number for your installed AgilePoint components:

- On the machine where your AgilePoint component is installed, in Windows navigate to **Add or Remove Programs**.
 - Select the AgilePoint component for which you want the version number.
 - Click the link, **Click here for Support Information**. The installed version appears on the pop-up window.
- Applying this Service Pack will cause AgilePoint Server and other related services to restart. Ensure you perform the upgrade at times when these restarts will have minimal impact on your operations.
 - If you are upgrading your AgilePoint SharePoint Integration v1, permission to access the SharePoint Integration database is required for the service pack installer to automatically upgrade the changes in each AgilePoint-enabled SharePoint virtual server. If the SharePoint database is not accessible during the upgrade, see [Additional Steps for SharePoint Integration v1](#).

Instructions

On every machine with AgilePoint client or server components installed:

- Open the upgrade installer file.
- If the AgilePoint SharePoint Integration v2 is installed on the SharePoint machine, complete the following field as desired.

Field Name	Definition
I want to manually upgrade AgilePoint SharePoint Integration v2	<p>Specifies one of the following:</p> <ul style="list-style-type: none"> Deselected - (Default) The SharePoint Integration solution files are updated automatically with no further intervention from you.

Field Name	Definition
	<ul style="list-style-type: none"> • Selected - The installer does not upgrade the SharePoint Integration solution files. You must upgrade them manually using the stsadm command line tool.

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

Updating AgilePoint Server Manager - Windows Service Mode

To complete your AgilePoint upgrade, you must open the AgilePoint Server Manager to update the database schema.

Prerequisites

- AgilePoint Server running in Windows Service mode.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.

Good to Know

- These instructions do not cover additional configuration changes in AgilePoint Server Manager. They assume you are performing a base upgrade with no additional configuration changes.

For more information about configuring AgilePoint Server using the AgilePoint Server Manager, see [AgilePoint Server Manager](#).

Navigation

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Server Manager**.

Instructions

On the AgilePoint Server machine, repeat the following procedure for each AgilePoint Server instance in your environment.

1. In the **AgilePoint Server Manager**, select the AgilePoint Server instance you want.
2. Click **Server Configuration** .

The **AgilePoint Server Configuration Utility** window opens.
3. On the **AgilePoint Server Configuration Utility** window, click **OK**.

This updates the database schema and closes the **AgilePoint Server Configuration Utility** window.
4. On the **AgilePoint Server Manager** window, in the **Password** field, enter the password for your AgilePoint Service Account.
5. Click **Update**.

If any additional validation errors occur, resolve them, and then click **Update**.

Running the SVC Client Utility Tool

Once you have upgraded to AgilePoint BPMS v5.0 R2 SP1, you must run the SVC Client Utility Tool on each instance of AgilePoint Enterprise Manager in your environment.

This topic provides the standard instructions for running the SVC Client Utility on any ASP.NET web application.

Prerequisites

- AgilePoint Server running in Windows Service mode.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.
- You have [updated your AgilePoint Server instances](#).
- Create a backup copy of the configuration file for the application you are configuring before using this utility.
- If you are using SharePoint or AgileForms Server on a machine that is not the AgilePoint Server machine (typically the case), copy the **web.config** file from the SharePoint or AgileForms machine to AgilePoint Server machine. The following are the default locations of the target web.config files:
 - **SharePoint** - c:\inetpub\wwwroot\wss\VirtualDirectories\[port number]
 - **AgileForms** - [AgileForms Server installation folder]\Webroot

Navigation

Do one of the following:

1. On the AgilePoint Server machine, navigate to **[AgilePoint Server Installation]\SVCUtilityTool\AgilePointWindowsServiceClientUtilityTool.exe**
2. Open the AgilePoint installation file, and click **Utilities and Other Support Files > AgilePoint Windows Service Client Utility Tool**.

Instructions

1. In the AgilePoint Windows Service Client Utility Tool dialog box, complete the following fields:
 - **Service Address** – The URI for the Windows Service for which you are creating the binding. The information required to build this URI is provided in the AgilePoint Server Manager window.
 - **HTTP** - http://[APServer Machine Name]: [Http Port]/AgilePointServer

When you create the bindings for the web application, the settings are automatically configured in the web.config file for both HTTP and TCP protocols. By default, the HTTP bindings are used. However, you can switch to TCP by modifying the following properties in the web.config:

- Change the following so value="**NetTcpBinding_IWCFWorkflowService**"

```
<add key="WorkFlowBindingUsed" value="WSHttpBinding_IWCFWorkflowService" />
```

- Change the following so value="**NetTcpBinding_IWCFEventServices**"

```
<add key="EventServicesBindingUsed" value="WSHttpBinding_IWCFEventServices" />
```

- Change the following so value="**NetTcpBinding_IWCFAdminService**"

```
<add key="AdminBindingUsed" value="WSHttpBinding_IWCFAdminService" />
```

- **Target Config** – The file name and location of the configuration file for the application you are configuring. This is required for SharePoint Integration. For other applications, you only need to run this utility if you are prompted.
 - **SharePoint Integration** – The web.config for the SharePoint web application you want to bind.
 - **Enterprise Manager** – The web.config for the Enterprise Manager web application.
 - **Data Services** – DataServicesWindowsService.exe.config in the Data Services installation folder. The default location is C:\Program Files\AgilePoint\AgilePoint Data Services\
 - **AgileForms** - The web.config file in the AgileForms installation folder. The default location is C:\Program Files\AgilePoint\AgileForms Server\Webroot
 - **Deployment Service** - apds.exe.config file in the Deployment Service installation folder. The default location is C:\Program Files (x86)\AgilePoint\AgilePoint Deployment Service\
2. Click **Settings** to configure the following fields:
- **Max Buffer Size**
 - **Max Buffer Pool Size**
 - **Max Received Message Size**
 - **Max String Content Length**
 - **Max Array Length**
- Guidance for modifying these values can be found at the following articles on MSDN:
- [http://msdn.microsoft.com/en-us/library/ms731361\(v=VS.100\).aspx](http://msdn.microsoft.com/en-us/library/ms731361(v=VS.100).aspx)
 - [http://msdn.microsoft.com/en-us/library/ms731325\(v=VS.100\).aspx](http://msdn.microsoft.com/en-us/library/ms731325(v=VS.100).aspx)
3. If you are using SharePoint or AgileForms Server on a machine that is not the AgilePoint Server machine, copy the modified web.config file back to its original location on the SharePoint or AgileForms Server machine.

Updating the Database Schema for AgilePoint Server - IIS Mode

To complete your AgilePoint upgrade, you must open the AgilePoint Server Manager to update the database schema. This procedure applies to AgilePoint Server running in IIS mode.

Prerequisites

- AgilePoint Server running in IIS mode.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. On the AgilePoint Server machine, click **Start > All Programs > AgilePoint > AgilePoint Configuration**.
2. Click **OK**.

Enabling AgileConnectors in an NLB Environment

To complete your AgilePoint upgrade in an NLB environment, you can enable the ADSyncModule and EventServices AgileConnectors on all AgilePoint Servers.

Prerequisites

- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.
- AgilePoint Server is running in an NLB environment.
- You previously configured AgilePoint Server in your NLB environment so that the ADSyncModule or EventServices AgileConnectors were active on only the primary AgilePoint Server machine.
- You want to use one or both of these AgileConnectors, and you want them to be NLB-enabled.

Instructions

On the AgilePoint machines that are not the primary machine:

- [Enable the ADSyncModule AgileConnector](#)
- [Enable the EventServices AgileConnector](#)

Updating the Database Schema for AgilePoint Data Services

To update the database for AgilePoint Data Services, do the following.

Prerequisites

- AgilePoint BPMS v5.0 installed.
This does not apply to v5.0 SP1 or higher.
- AgilePoint Data Services installed.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file [\[AgilePoint Data Services installation folder\]\DataServiceConfiguration.exe](#).
2. Click **OK**.

Updating the Database Schema for AgileReports

To update the database for AgileReports, do the following.

Prerequisites

- AgileReports installed.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.

Instructions

On the AgilePoint Server machine:

1. Open the file **[AgilePoint Server installation folder]\AgileReports\bin\ahDbAdmin.exe**.
2. On the **Logi 10 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: **[AgilePoint Server installation folder]\AgileReports**.
5. Click **OK**.
6. Click **Manage an Instance**.
7. Click **Upgrade Instance**.
8. Under **Metadata Database**, click **Update**.
9. Click **Close**.

Updating the Database Schema for AgileForms

To update the database for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.

Instructions

1. On the AgileForms Server machine, click **Start > All Programs > AgilePoint > AgileForms > AgileForms Configuration**.
2. Log on as required.
3. Click the **Database** tab.
4. Select **Run Database Scripts**.
5. Click **OK**.

Updating the AgileForms Help Link

When you upgrade AgileForms, you must manually update the URL for the AgileForms online help. The updated link provides an entirely updated online help system, which is important for AgileForms users.

To update the help link for AgileForms, do the following.

Prerequisites

- AgileForms installed.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.

Navigation

1. On the AgileForms Server machine, open the file [\[AgileForms Server installation folder\]\FS2\Overrides.txt](#)

Instructions

1. In the file Overrides.txt, modify the value of the following property.

Field Name	New Value
Forms/AF/help_url	http://agileformshelp.agilepoint.com/

2. Save and close Overrides.txt.

Manually Upgrading SharePoint Integration v2 Using STSADM

If you meet the prerequisites in this topic, you must manually upgrade AgilePoint SharePoint Integration. This topic describes the manual upgrade procedure using the stsadm command line tool.

Prerequisites

- AgilePoint SharePoint Integration v2 installed.
- You have applied your AgilePoint BPMS upgrade package on all applicable AgilePoint machines.
- When upgrading AgilePoint BPMS, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration v2**.

Instructions

On the primary SharePoint server machine, do the following.

1. On a machine where you extracted the AgilePoint Upgrade installer, navigate to the folder [AgilePoint installer files]\Net20\SharePointv2\.
2. Copy the following files to your primary SharePoint server machine:
 - Ascentn.SharePoint.SettingsList.wsp
 - Ascentn.SharePoint.WebParts.wsp
 - Ascentn.SharePoint.WFIntegration.wsp
 - Ascentn.SharePoint.ListForm.wsp
 - Ascentn.SharePoint.WebParts_XRM.wsp (AgileXRM only)
 - FirmstepSharepointConnector.wsp (AgileForms only)

3. Open the **stsadm** command line tool.

- **SharePoint 2007** - C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN\stsadm.exe
- **SharePoint 2010** - C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN\stsadm.exe

4. In **stsadm**, run the following commands to upgrade the solution files:

SharePoint Integration for AgileXRM only:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts_XRM.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts_XRM.wsp" -immediate
  -allowgacdeployment -allowcaspolices
```

SharePoint Integration for AgilePoint:

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.SettingsList.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.SettingsList.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WebParts.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WebParts.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.WFIntegration.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.WFIntegration.wsp" -immediate
  -allowgacdeployment
```

```
stsadm -o upgradesolution -name
  Ascentn.SharePoint.ListForm.wsp -filename
  "[AgilePoint Integration for SharePoint installation folder]\
  Ascentn.SharePoint.ListForm.wsp" -immediate
  -allowgacdeployment
```

SharePoint Integration for AgileForms only:

```
stsadm -o upgradesolution -name "FirmstepSharepointConnector.wsp"
  -filename "[AgileForms Integration for SharePoint installation
  folder]\FirmstepSharepointConnector.wsp" -immediate
  -allowgacdeployment
```

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

```
stsadm -o copyappbincontent
```

Manually Upgrading SharePoint Integration v2 Using PowerShell

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

Prerequisites

- AgilePoint SharePoint Integration v2 installed.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.
- When upgrading AgilePoint BPMS, you selected the option **I want to manually upgrade AgilePoint SharePoint Integration v2**.

Instructions

1. On a machine where you extracted the AgilePoint Upgrade installer, navigate to the folder [AgilePoint installer files]\Net20\SharePointv2\.
2. Copy the following files to your primary SharePoint server machine:
 - Ascentn.SharePoint.SettingsList.wsp
 - Ascentn.SharePoint.WebParts.wsp
 - Ascentn.SharePoint.WFIntegration.wsp
 - Ascentn.SharePoint.ListForm.wsp
 - Ascentn.SharePoint.WebParts_XRM.wsp (AgileXRM only)
 - FirmstepSharepointConnector.wsp (AgileForms only)
3. 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
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.SettingsList.wsp"
-GACDeployment -FullTrustBinDeployment
```

```
Update-SPSolution -Identity Ascentn.SharePoint.WebParts.wsp -LiteralPath
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.WebParts.wsp"
-GACDeployment -FullTrustBinDeployment
```

```
Update-SPSolution -Identity Ascentn.SharePoint.WFIntegration.wsp -LiteralPath
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.WFIntegration.wsp"
-GACDeployment -FullTrustBinDeployment
```

```
Update-SPSolution -Identity Ascentn.SharePoint.ListForm.wsp -LiteralPath
"[AgilePoint Integration for SharePoint installation
folder]\Ascentn.SharePoint.ListForm.wsp"
-GACDeployment -FullTrustBinDeployment
```

SharePoint Integration for AgileForms only:

```
Update-SPSolution -Identity FirmstepSharepointConnector.wsp -LiteralPath
"[AgileForms Integration for SharePoint installation
folder]\FirmstepSharepointConnector.wsp"
-GACDeployment -FullTrustBinDeployment
```

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

```
Install-SPApplicationContent
```

6. Do one of the following:
 - For AgilePoint Server running in IIS mode, reset IIS.
 - For AgilePoint Server running in Windows Service mode:
 1. Stop IIS.
 2. Restart the Windows service for the AgilePoint Server instance.
 3. Start IIS.

Installing InfoPath Client Integration

If you meet the prerequisites in this topic, you must install InfoPath Client Integration. This does not apply to InfoPath server-side integration.

Prerequisites

- You are using InfoPath Client Integration.
A small minority of AgilePoint customers use InfoPath Client Integration, so this is not a common scenario.
- You are upgrading to AgilePoint BPMS v5.0 R2 SP1 from one of the following versions:
 - v5.0
 - v5.0 SP1No action is required for v5.0 SP2 or higher.
- You have applied the AgilePoint BPMS v5.0 R2 SP1 upgrade on all applicable AgilePoint machines.

Instructions

1. Contact AgilePoint Support to download the latest InfoPath Client Integration installation software.
For more information, see [Contacting AgilePoint Sales](#).
2. Follow the instructions from AgilePoint Support to install the software.

Activating AgilePoint Licenses

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

- AgilePoint Envision
- AgilePoint Developer
- AgilePoint Server

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

Navigation

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

Instructions

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

Navigation

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

Instructions

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**. The Activation Key appears.

If this process fails to generate an Activation Key, email 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, copy and paste the Activation Key.
7. Click **Next**, and then click **Finish**.

Uninstalling AgilePoint BPMS

This section provides instructions for uninstalling each component of the AgilePoint BPMS Suite.



Note: This section includes information for installing all possible AgilePoint components. Not all of these components may be installed in your environment.



Note: Uninstalling a licensed AgilePoint component (e.g. AgilePoint Server, AgilePoint Envision, or AgilePoint Developer) that has already been activated will not deactivate any license keys that were used to activate the component. Although previously activated license keys can be re-used to activate the same version of the AgilePoint component on the same computer, it will not allow you to use the key to activate on a different computer or for a different version.

Uninstall AgilePoint Server

To uninstall AgilePoint Server, do the following.

Prerequisites

1. If you are uninstalling an AgilePoint Server instance in a Windows Service environment, delete all AgilePoint Server service instances from the AgilePoint Server Manager. These services will not be removed automatically.
2. Manually back up the **netflow.cfg** file in your AgilePoint Server installation directory.

Good to Know

- Uninstalling the AgilePoint Server component does not affect the workflow database.

Instructions

1. In Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint Server**

Uninstall Clustering Server Manager

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - a. Microsoft Internet Explorer

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Clustering Server Manager**

Uninstall AgilePoint Enterprise Manager

To uninstall AgilePoint Enterprise Manager, do the following.

Prerequisites

1. Clear the cache in your web browser on any machine where you access Enterprise Manager.
2. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - Microsoft Internet Explorer
 - Microsoft IIS

Instructions

1. Delete the web application for Enterprise Manager.
2. In Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint Enterprise Manager**

Uninstall AgilePoint Envision

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - a. Microsoft Internet Explorer
 - b. Microsoft InfoPath (If it is installed)
 - c. Microsoft Visio
 - d. AgilePoint Envision

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Envision**

Uninstall AgilePoint Developer

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - a. Microsoft Internet Explorer

- b. Microsoft Visual Studio.NET

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Developer**

Uninstall AgilePoint InfoPath Integration

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - a. Microsoft Internet Explorer
 - b. Microsoft InfoPath (If it is installed)

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint InfoPath Integration**

Uninstall AgilePoint Microsoft Office Client Integration

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - a. Microsoft Internet Explorer
 - b. Microsoft Word
 - c. Microsoft Excel
 - d. Microsoft PowerPoint

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Microsoft Office Integration**

Uninstall AgilePoint Outlook Integration

Prerequisites

1. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.

- a. Microsoft Internet Explorer
- b. Microsoft Outlook

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Outlook Integration**

Uninstall AgilePoint SharePoint Integration v1

Prerequisites

1. Log on to the SharePoint machine as a user with sufficient privileges to access the SharePoint configuration database.
2. Manually back up the **web.config** file of your SharePoint site.
The SharePoint web.config file is located under the Virtual Directory of your SharePoint web site. When it is installed in the default web site, the location is **C:\inetpub\wwwroot**.
3. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - a. Microsoft Internet Explorer
 - b. Any web pages that include the SharePoint Web Parts.
 - c. Microsoft IIS
 - d. Microsoft InfoPath (If it is installed)

Instructions

1. In Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint SharePoint Integration**
2. Open the SharePoint site that contains the AgilePoint Integration in Microsoft Office SharePoint Designer.
3. In the **_catalogs** folder, click on **wp** (Web Part Gallery).
4. Select the Web Parts and delete them.

5. Run the following command prompt to delete the AgilePoint Web Part Package.

```
stsadm -o  
deletewppack -name apwpcab.cab -url http://...
```

6. Run the following command to uninstall the AgilePoint Web Parts from the SharePoint Farm.

```
stsadm -o uninstallfeature -id  
134872ac-c2bf-4afc-b1e3-4d809934c51f -force
```

7. (Optional) The uninstallation may not remove some of the AgilePoint SharePoint Integration configuration settings from your SharePoint site's web.config file.

The SharePoint web.config file is located under the Virtual Directory of your SharePoint web site. When it is installed in the default web site, the location is **C:\inetpub\wwwroot**.

If you want to remove those settings, you can manually remove the following items from your SharePoint web.config:

AgilePoint Server References:

```
<appSettings>
  <add key="AgilePointUrl" value="http://[machineName]:[portNum]/
    AgilePointServer" />
  <add key="AgilePointDomain" value="[domain name]" />
  <add key="AgilePointUsername" value="[user name]" />
  <add key="AgilePointPassword" value="[encrypted password]"
</appSettings>
```

AgilePoint Web Part References:

```
<SafeControl Assembly="APWP, Version=2.0.2.0,
  Culture=neutral, PublicKeyToken=2f06ef94bac0a0f" Namespace="APWP"
  TypeName="*" Safe="True" />
</SafeControl>
```

8. Remove the folder **[SharePoint server extensions folder]\TEMPLATE\LAYOUTS\AP**
9. Remove the **Ascentn.SharePoint.Common** Assembly Reference from the SharePoint web.config.
10. It is recommended to restart your system after uninstalling the AgilePoint SharePoint Integration component.

Uninstall AgilePoint SharePoint Integration v2

Prerequisites

1. Log on to the SharePoint machine as a user with sufficient privileges to access the SharePoint configuration database.
2. Manually back up the **web.config** file of your SharePoint site.
The SharePoint web.config file is located under the Virtual Directory of your SharePoint web site. When it is installed in the default web site, the location is **C:\inetpub\wwwroot**.
3. Verify that none of the following programs are running. If any of the above programs are in use during uninstallation, they could potentially prevent the uninstaller from completely removing installed components.
 - a. Microsoft Internet Explorer
 - b. Any web pages that include the SharePoint Web Parts.
 - c. Microsoft IIS
 - d. Microsoft InfoPath (If it is installed)

Instructions

1. Navigate to **[AgilePoint Integration for SharePoint installation folder]**.
2. Run the **UninstallSharePointV2Integration.bat** file.
Please contact AgilePoint Support if you cannot locate this file.
3. In Windows, use **Add or Remove Programs** to remove the following program:
 - **AgilePoint SharePoint Integration**
4. Remove the folder **[SharePoint server extensions folder]\TEMPLATE\LAYOUTS\AP**

5. It is recommended to restart your system after uninstalling the AgilePoint SharePoint Integration component.

Uninstall AgilePoint Data Services

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint Data Services**

Uninstall AgileReports

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgileReports**

Uninstall AgilePoint One Click Deployment

Instructions

In Windows, use **Add or Remove Programs** to remove the following program:

- **AgilePoint One Click Deployment**