



# WorkflowGen 5.7.4 Upgrade Guide

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# Overview

This upgrade guide covers all the procedures involved in the update of WorkflowGen. It is aimed at system administrators who will be required to update the existing application.

# Upgrade

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# Preparation

- 1- You must be administrator of the Web Server.
- 2- You must know:
  - The physical path on the web server where WorkflowGen web application is installed.
  - The physical path on the web server where WorkflowGen Windows services is installed.
  - The URL of the web server where WorkflowGen is installed.
  - MS SQL Server database:
    - The name of the MS SQL Server.
    - The credentials of the SA account.
    - The file path of the SQL server database files on the SQL server machine.
  - Oracle database:
    - An existing Oracle data source name.
    - The credentials of the database user account that has creation permission on the specified Oracle instance.
- 3- You will need to perform the following actions:
  - Update the web application files.
  - Update the Windows services files.
  - Update the SQL Server database structure and contents if MS SQL Server is chosen.
  - Update the Oracle database structure and contents if Oracle is chosen.

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# WorkflowGen Upgrade Pack

## 2.1 Overview

The following procedures apply to the upgrade pack of **WorkflowGen 5.7.4**. For more information on how to obtain the latest WorkflowGen upgrade pack, please contact your WorkflowGen service provider.

**\*\*\* Important:** If you are planning an upgrade of WorkflowGen from versions **5.0.38 or 5.0.39**, please contact our Help desk **prior** to performing this upgrade. There is a known compatibility issue that our help desk will resolve with you.

## 2.2 Package Content

The upgrade package is distributed in the form of a compressed file that contains the following information:

- **Inetpub:** WorkflowGen web application files
- **Program Files:** WorkflowGen Windows services files
- **Databases:** WorkflowGen database update and creation files

## 2.3 IIS Server

Stop the IIS server or at least your WorkflowGen web applications if other web sites are using the same IIS server.

## 2.4 WorkflowGen Windows Services

Stop the WorkflowGen Directory Sync and Engine services in the Windows Services Management Console.

## 2.5 Backup

Perform a full backup (Data and Applications) of WorkflowGen as indicated in the technical documentation.

### **Application and Data files**

... \inetpub\wwwroot\wfgen  
DRIVE:\Program Files\Advantys\WorkflowGen

### **Database**

Standard SQL database backup provided with your DBMS

**If the file storage path is not the standard “App\_Data” then you have to backup the corresponding folder.**

## 2.6 Update WorkflowGen Web Application Files

Copy and overwrite with the upgrade content from *pack\inetpub\wwwroot\wfgen* to your WorkflowGen web application folder. By default, the suggested physical path is *C:\inetpub\wwwroot\wfgen*

### \*\*\* IMPORTANT NOTES ABOUT OVERWRITING FILES \*\*\*

1. Do **NOT** copy and overwrite your existing **C:\Vnetpub\wwwroot\wfgen\web.config** file if you want to keep your current WorkflowGen configuration settings and database connection information.
2. Note also that in WorkflowGen installations where the "App\_Data" is configured on a remote server (e.g. SAN, file share, etc.), please refer to the installation manual for a list of all the web.config files that need to be backed up and preserved prior to the upgrade as these files will contain the specific App\_Data path to your installation.
3. It is possible that these default CSS files have been updated in the latest version and could overwrite any changes you have made before:

```
\wwwroot\wfgen\App_Themes\Default\portal\css\Default.css  
\wwwroot\wfgen\App_Themes\Default\admin\css\Default.css
```

4. Other default files provided in the upgrade pack:

```
\wwwroot\wfgen\login.aspx  
\wwwroot\wfgen\App_Data\Templates\Emails*  
\wwwroot\wfgen\App_Data\Templates\Reports\Charts*  
\wwwroot\wfgen\App_GlobalResources*.resx  
\wwwroot\wfgen\App_Themes\Default\admin\css*.css  
\wwwroot\wfgen\App_Themes\Default\portal\css*.css  
\wwwroot\wfgen\App_Themes\Default\portal\banner\banner.htm  
\wwwroot\wfgen\App_Themes\Default\portal\rss\default.xsl  
\wwwroot\wfgen\ws\App_Data*.txt  
\wwwroot\wfgen\ws\App_GlobalResources*.resx
```

If you have made changes to these files, please make a backup of the original prior to the upgrade and manually merge your changes with the new files.

## 2.7 Update WorkflowGen Windows Services Files

Copy and overwrite with the upgrade content from *pack\Program Files\Advantys\WorkflowGen* to your WorkflowGen Windows services folder. By default, the suggested physical path is *C:\Program Files\Advantys\WorkflowGen*.

\*\*\* Do **NOT** copy and overwrite your existing **C:\Program Files\Advantys\WorkflowGen\Services\bin\\*.config** files.

## 2.8 Update the Web Configuration file

This section contains configuration parameter changes to be applied in orders.

### 2.8.1 When upgrading from any 5.0 versions.

#### **Add new:**

```
<add key="EngineEnableSelfServiceDataAssignException" value="N" />
```

This parameter will specify whether or not to raise an assignment exception when using the Self-Service assignment method and retrieving a user from a data that is empty or contains invalid usernames.

### 2.8.2 When upgrading from version 5.1.6 and prior (5.0 to 5.1.5).

#### Add new:

```
<add key="ApplicationDistributedDatabaseSourceMode" value="0" />
<add key="ApplicationEnableDistributedDatabaseSource" value="N" />
```

These parameters are required by the database scaling feature.

### 2.8.3 When upgrading from version 5.1.9 and prior (5.0 to 5.1.8).

#### Add new:

```
<add key="PortalCommentsRefreshFrequency" value="30000" />
<add key="PortalCommentsPopUpWidth" value="376" />
<add key="PortalCommentsPopUpHeight" value="545" />
<add key="PortalCommentsSortBy" value="DATE_POST" />
<add key="PortalCommentsSortOrder" value="ASC" />
<add key="PortalCommentsExpandView" value="N" />
<add key="PortalEnableComments" value="Y" />
<add key="PortalCommentsListSize" value="25" />
```

These parameters are required by the request comments feature.

### 2.8.4 When upgrading from version 5.2.0 and prior (5.0 to 5.1.9).

#### Add new:

```
<add key="ApplicationArchiveSiteUrl" value="" />
<add key="ApplicationEnableArchiveSiteRedirectConfirmation" value="Y" />
<add key="EngineNotificationDefaultReplyTo" value="" />
<add key="EngineNotificationMaxFileAttSize" value="10" />
<add key="PortalDisplayCodeNames" value="N" />
<add key="PortalMaxListSize" value="1000" />
<add key="PortalQuickViewEnabled" value="Y" />
<add key="PortalQuickViewDataName" value="FORM_ARCHIVE" />
<add key="PortalQuickViewDisplayOnMouseEvent" value="CLICK" />
```

### 2.8.5 When upgrading from version 5.3.0 and prior (5.0 to 5.2.0).

#### Add new:

```
<add key="EngineNotificationTextDetection" value="Y" />
<add key="PortalTextDetection" value="Y" />
<add key="ReportsTextDetection" value="Y" />
<add key="AdministrationFormDataProviderName" value="System.Data.SqlClient,
System.Data.OleDb, System.Data.Odbc, System.Data.OracleClient" />
```

### 2.8.6 When upgrading from version 5.5.0 and prior (5.0 to 5.4.1).

#### Add new:

```
<add key="AdministrationEnableDeletionRulesCheck" value="Y" />
<add key="DirectorySynchronizationMaxUserDeletionCount" value="0" />
```



**2.8.7** When upgrading from version 5.5.1 and prior (5.0 to 5.5.0).

**Add new:**

```
<add key="AdministrationRestrictManagerToModifyGlobalParticipant" value="N" />
<add key="DirectorySynchronizationSyncGroupMembersUsedInParticipantOnly"
value="N" />
```

**2.8.8** When upgrading from version 5.5.5 and prior (5.0 to 5.5.4).

**Add new:**

```
<add key="PortalActivityCompleteInBackground" value="N" />
```

**2.8.9** When upgrading from version 5.6.0 and prior (5.0 to 5.5.5).

**Add new:**

```
<add key="ApplicationSecurityEnableEncryption" value="N" />
<add key="ApplicationSecurityEncryptionKey" value="Your encryption key" />
<add key="PortalEnableSearchResultAutoRedirect" value="Y" />
```

**2.8.10** When upgrading from version 5.6.1 and prior (5.0 to 5.6.0).

**Add new:**

```
<add key="ApplicationShowAssociatedDataWithEmptyValue" value="Y" />
```

**2.8.11** When upgrading from version 5.6.3 and prior (5.0 to 5.6.2).

**Add new:**

```
<add key="PortalCommonProcessDataNameList" value="" />
```

**Rename:**

```
<add key="ApplicationSecurityEnableEncryption" value="N" />
to
<add key="ApplicationSecurityEnableWebAppsSecureMode" value="N" />
```

**Note:** *WorkflowGen.My and WorkflowGen.My.Web.UI.WebControls (WorkflowFileUpload) v2.3.5 are required in all your web forms if the security feature (#3387: Security: Web app secure mode simplified without encryption) is enabled in WorkflowGen 5.6.4.*

For more information, see FAQ: <http://community.workflowgen.com/kb/setup-web-app-security-workflow-parameters-secure-mode.html>

**Remove (obsolete):**

```
<add key="ApplicationSecurityEncryptionKey" value="" />
<add key="PortalCustomHeaderHeight" value="" />
```

**2.8.12** When upgrading from version 5.7.0 and prior (5.0 to 5.6.4).

**Add new:**

```
<add key="AdministrationFormDesignUndoLimit" value="30" />
```

**Update:**

For no banner: <add key="PortalFrameSetHeight" value="0,53,\*,0" />

or

With new default banner: <add key="PortalFrameSetHeight" value="30,53,\*,0" />

**2.8.13** When upgrading from version 5.7.2 and prior.

**Add new:**

<add key="PortalEnableCallingCard" value="Y" />

## 2.9 Update the Directory Synchronization Configuration file

There is a new configuration parameter required when upgrading from version 5.1.5 and prior (including 5.0.x). This parameter allows providing a unique service name to the WorkflowGen Directory Synchronization service should you have multiple instances of WorkflowGen installed on a single server.

(C:\Program

Files\Advantys\WorkflowGen\Services\bin\WfgDirectoriesSyncService.exe.config)

<add key="ServiceName" value="WorkflowGenDirSyncService"/>

## 2.10 Update the WorkflowGen Engine Service Configuration file

There is a new configuration parameter required when upgrading from version 5.1.5 and prior (including 5.0.x). This parameter allows providing a unique service name to the WorkflowGen Engine service should you have multiple instances of WorkflowGen installed on a single server.

(C:\Program

Files\Advantys\WorkflowGen\Services\bin\WfgWorkflowEngineService.exe.config)

<add key="ServiceName" value=" WorkflowGenEngineService "/>

## 2.11 Upgrade WorkflowGen Database

**MS SQL Server:**

- Step 1 (for version 5.1.9 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-2-0.sql in your SQL Server Management Studio tool.
- Step 2 (for version 5.2.x and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-3-0.sql in your SQL Server Management Studio tool.
- Step 3 (for version 5.3.x, 5.4.0 (alpha, beta 1 and beta 2) and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-4-0.sql in your SQL Server Management Studio tool.
- Step 4 (for version 5.4.x official and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-5-0.sql in your SQL Server Management Studio tool.
- Step 5 (for version 5.5.0 and prior):

Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-5-1.sql in your SQL Server Management Studio tool.

- Step 6 (for version 5.5.1 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-5-2.sql in your SQL Server Management Studio tool.
- Step 7 (for version 5.5.4 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-5-5.sql in your SQL Server Management Studio tool.
- Step 8 (for version 5.5.5 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-6-0.sql in your SQL Server Management Studio tool.
- Step 9 (for version 5.6.1 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-6-2.sql in your SQL Server Management Studio tool.
- Step 10 (for version 5.6.2 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-6-3.sql in your SQL Server Management Studio tool.
- Step 11 (for version 5.6.3 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-6-4.sql in your SQL Server Management Studio tool.
- Step 12 (for version 5.7.0 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-7-1.sql in your SQL Server Management Studio tool.
- Step 13 (for version 5.7.1 and prior):  
Launch the database update script pack\Databases\MsSQLServer\Update\_WFG-V5-7-2.sql in your SQL Server Management Studio tool.

**Oracle:**

- Step 1 (for version 5.1.9 and prior):  
Launch the database update script pack\Databases\Oracle\Update\_WFG-V5-2-0.sql in your Oracle SQL Scripts tool.
- Step 2 (for version 5.2.x and prior):  
Launch the database update script pack\Databases\Oracle\Update\_WFG-V5-3-0.sql in your Oracle SQL Scripts tool.
- Step 3 (for version 5.3.x, 5.4.0 (alpha, beta 1 and beta 2) and prior):  
Launch the database update script pack\Databases\Oracle\Update\_WFG-V5-4-0.sql in your Oracle SQL Scripts tool.
- Step 4 (for version 5.4.x official and prior):  
Launch the database update script pack\Databases\Oracle\Update\_WFG-V5-5-0.sql in your Oracle SQL Scripts tool.
- Step 5 (for version 5.5.0 and prior):  
Launch the database update script pack\Databases\Oracle\Update\_WFG-V5-5-1.sql in your Oracle SQL Scripts tool.
- Step 6 (for version 5.5.4 and prior):  
Launch the database update script pack\Databases\Oracle\Update\_WFG-V5-5-5.sql in your Oracle SQL Scripts tool.

- Step 7 (for version 5.5.5 and prior):  
Launch the database update script `pack\Databases\Oracle\Update_WFG-V5-6-0.sql` in your Oracle SQL Scripts tool.
- Step 8 (for version 5.6.1 and prior):  
Launch the database update script `pack\Databases\Oracle\Update_WFG-V5-6-2.sql` in your Oracle SQL Scripts tool.
- Step 9 (for version 5.6.2 and prior):  
Launch the database update script `pack\Databases\Oracle\Update_WFG-V5-6-3.sql` in your Oracle SQL Scripts tool.
- Step 10 (for version 5.6.3 and prior):  
Launch the database update script `pack\Databases\Oracle\Update_WFG-V5-6-4.sql` in your Oracle SQL Scripts tool.
- Step 11 (for version 5.6.4 and prior):  
Launch the database update script `pack\Databases\Oracle\Update_WFG-V5-7-0.sql` in your Oracle SQL Scripts tool.
- Step 12 (for version 5.7.0 and prior):  
Launch the database update script `pack\Databases\Oracle\Update_WFG-V5-7-1.sql` in your Oracle SQL Scripts tool.
- Step 13 (for version 5.7.1 and prior):  
Launch the database update script `pack\Databases\Oracle\Update_WFG-V5-7-2.sql` in your Oracle SQL Scripts tool.

## 2.12 Upgrade WorkflowGen Database for MS SQL Server 2012 compatibility (optional)

### MS SQL Server:

- Launch the database update script `pack\Databases\MsSQLServer\Update_WFG-V5-0_SQL_Triggers_2012.sql` in your SQL Server Management Studio tool.

**\*\*\* Important: The database compatibility upgrade with `Update_WFG-V5-0_SQL_Triggers_2012.sql` script is mandatory before migrating WorkflowGen's database from 2005/2008 R2 to 2012.**

## 2.13 Create a clean WorkflowGen Database (optional)

### **MS SQL Server:**

- Launch the database creation script *pack\Databases\MsSQLServer\CreateWFGSQLDatabase.vbs* and follow the instructions on the screen.

### **Oracle:**

- Launch the database creation script *pack\Databases\Oracle\CreateWFGOracleDatabase.vbs* and follow the instructions on the screen.
- Note: An Oracle database instance will **NOT** be created during the installation. It is required to provide an existing empty Oracle database instance prior to the installation.

Update your database connection string in WorkflowGen web application configuration file (*C:\inetpub\wwwroot\wfgen\web.config*) if required.

## 2.14 Create the WebForms web application in IIS (mandatory)

In IIS, create the web application for *\wfgen\WfApps\WebForms*.

## 2.15 Disable and remove RaiseException web service application in IIS (optional)

From WorkflowGen 5.6.3, the RaiseException workflow application has been converted to an Assembly application type (See 5.6.3 release note: #3371). In this case, the corresponding 'RaiseException' web service app in IIS and file system folder (*\wfgen\WfApps\WebServices\RaiseException*) can be disabled and removed since they are no longer used.

## 2.16 Restart IIS Server and Windows Services

Restart your WorkflowGen web applications and Windows Services.

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# Tests

## 3.1 Web App addresses

Check the following URLs with "wfgen\_admin" user account:

- User module: <http://yoursite/wfgen>
- Administration module: <http://yoursite/wfgen/admin>

## 3.2 Test Sample Processes

You can download and install some sample processes from the WorkflowGen Community web site.

- Log on to <http://community.workflowgen.com/downloads/process-templates/>
- Browse the C# or VB.NET Samples
- Follow the instructions to download and import the different samples