



Web Resource Application Note Upgrading to Web Resource Version 2.9

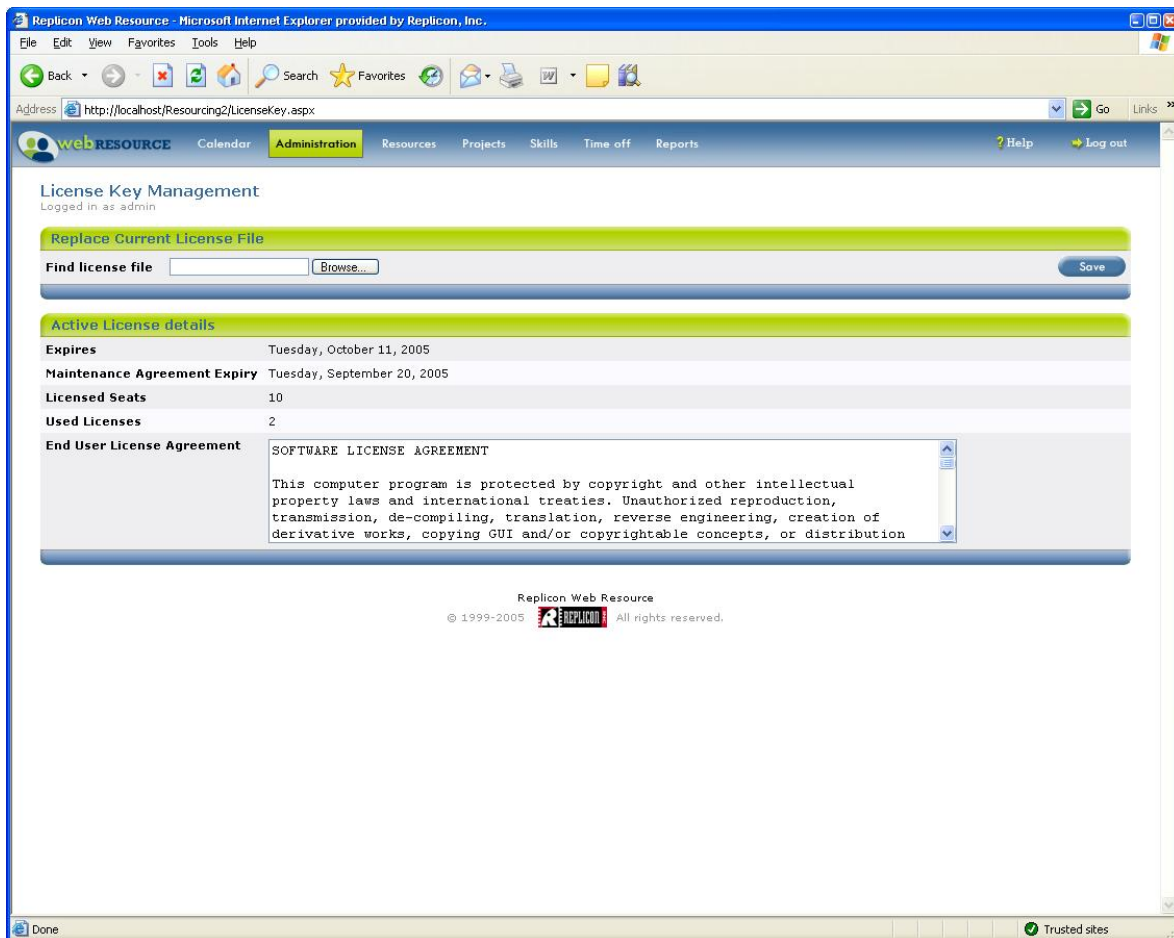
Before Upgrading

Back up your existing database before beginning the upgrade process. For information on backing up your database, consult the documentation provided with your database platform.

License File Verification

Before upgrading your Web Resource installation, verify that the original installation has not passed the maintenance expiry date. If the maintenance is still in effect (i.e., the expiry date has not passed), you can upgrade your existing Web Resource installation and continue to use the upgraded version even after the maintenance expires. However, if you attempt to upgrade the installation after maintenance has already expired, you will not be able to access the new version.

To verify the maintenance expiry date, select **Licensing** from the **Administration** menu.

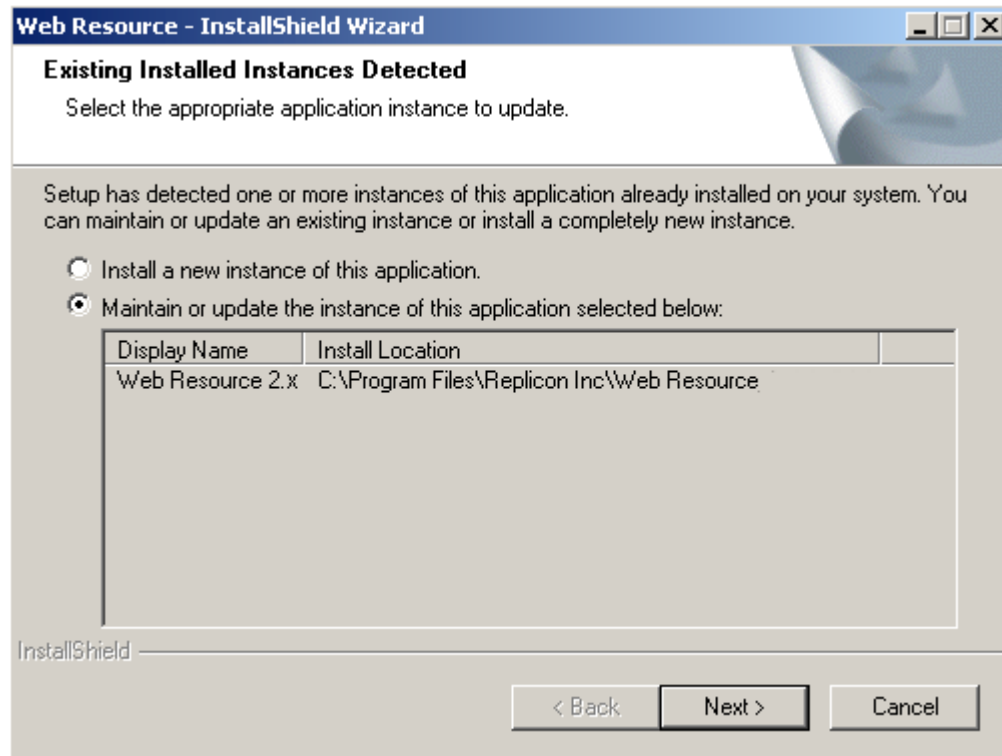




Upgrading an Existing Installation

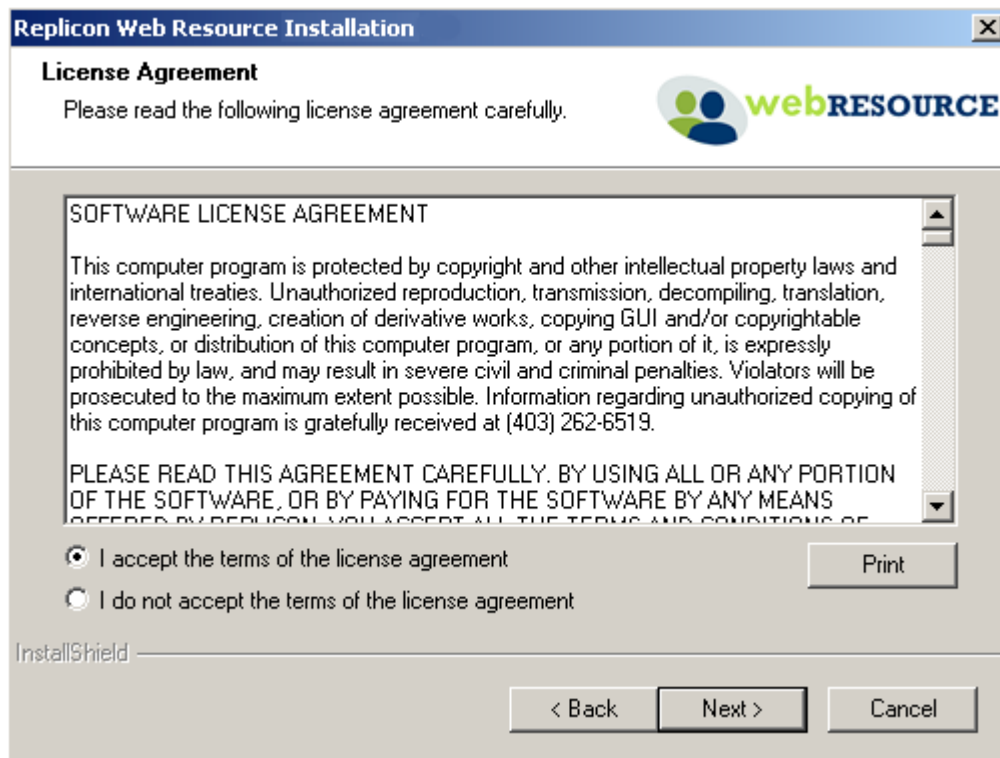
To upgrade your existing Web Resource installation:

1. Run the installation program.
2. Select **Maintain or update...** and click on the appropriate instance to highlight it in the list box. Select the **Next** button to continue.

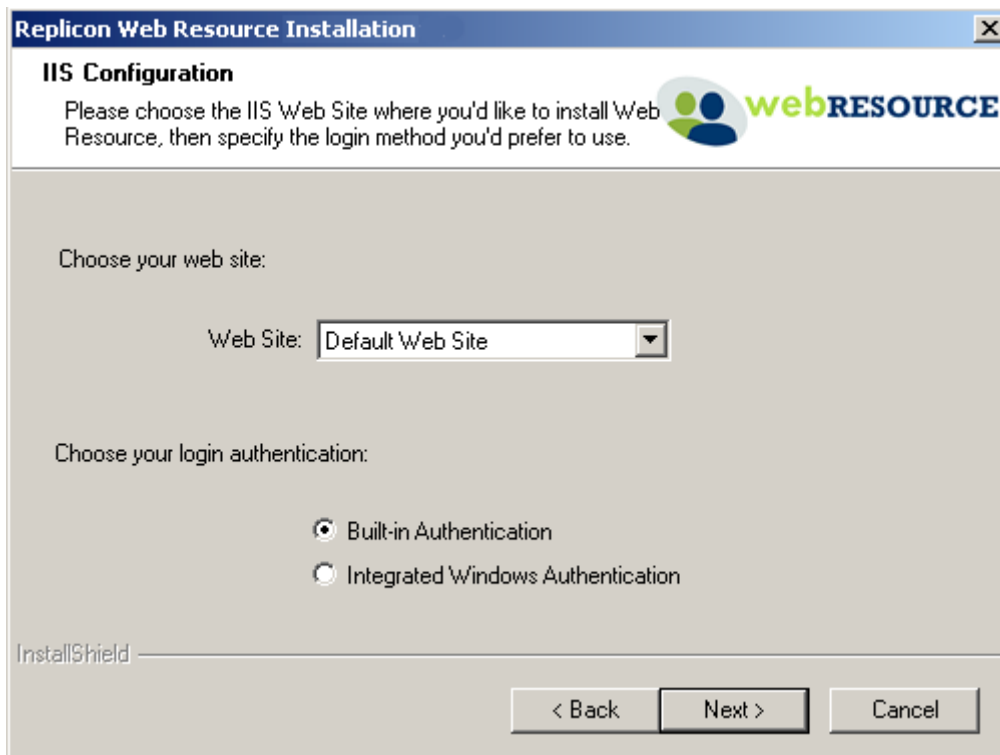




3. Read the license agreement carefully. Select the radio button labeled **I accept the terms...** if you agree with the terms outlined. You must accept the license agreement to install Web Resource. When you are ready, select the **Next** button to continue.



4. IIS Configuration





5. Database Configuration

Replicon Web Resource Installation

Database Configuration
Please choose the type of database you'd like to use.

Default Database Setup will download and install Microsoft SQL Express. An Internet connection is required.

Microsoft SQL Server Setup will use an existing Microsoft SQL Server which you specify.

InstallShield

Use Existing Database < Back Next > Cancel

6. Microsoft SQL Server Configuration

Replicon Web Resource Installation

Microsoft SQL Server Configuration
Please define your Microsoft SQL Server settings.

Specify your Microsoft SQL Server, and an administrative login name and password. If you choose Windows Authentication setup will use your credentials to connect to the SQL Server. Setup will create the database, and a database user.

SQL Server: (local)

Use Windows Authentication

Login Name: _____

Password: _____

InstallShield

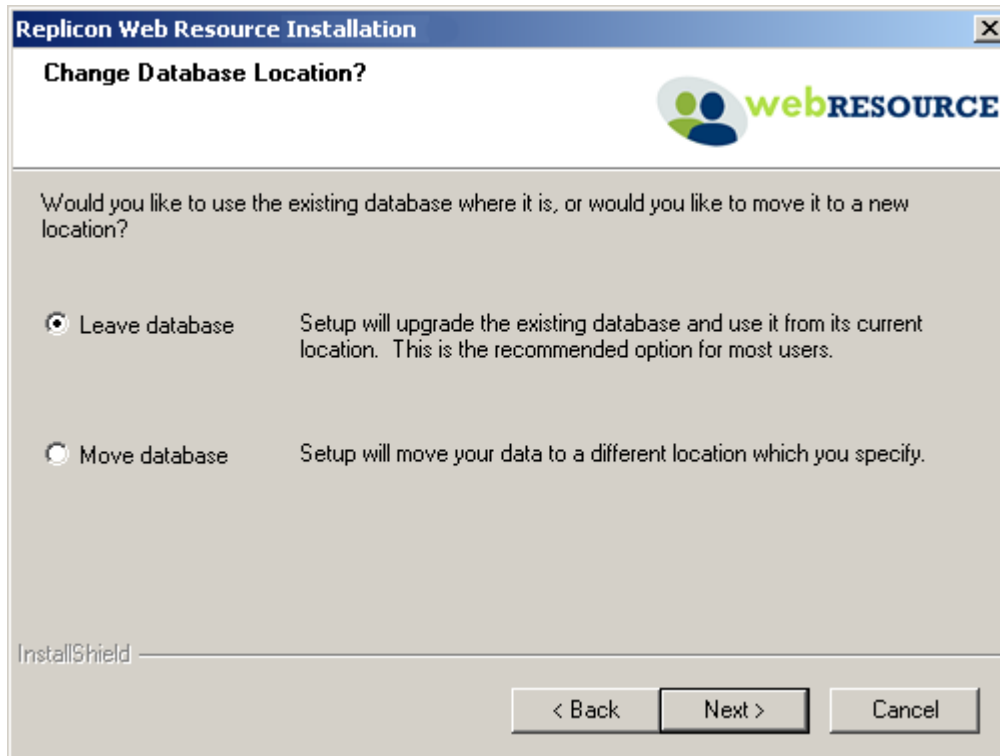
Advanced < Back Next > Cancel



7. You must now decide whether to upgrade the existing database, or create a copy of the existing database, as described below:

- **Leave Database**
Select **Leave Database** to upgrade the current database structure with all data intact. This option is the recommended upgrade choice.
- **Move Database**
Select **Move Database** to create a copy of the existing database and upgrade the copy. This option will move the copied database to a new location, and will maintain the original database, in its original version; however, the original database will not be connected to Web Resource once the upgrade is complete.

Moving (copying) the database is beneficial if you want to create the database on a different server or database instance from the existing Web Resource installation. You can also move the database and reconnect it at a later time; however, the installation will handle all configuration options if you choose to do it now.

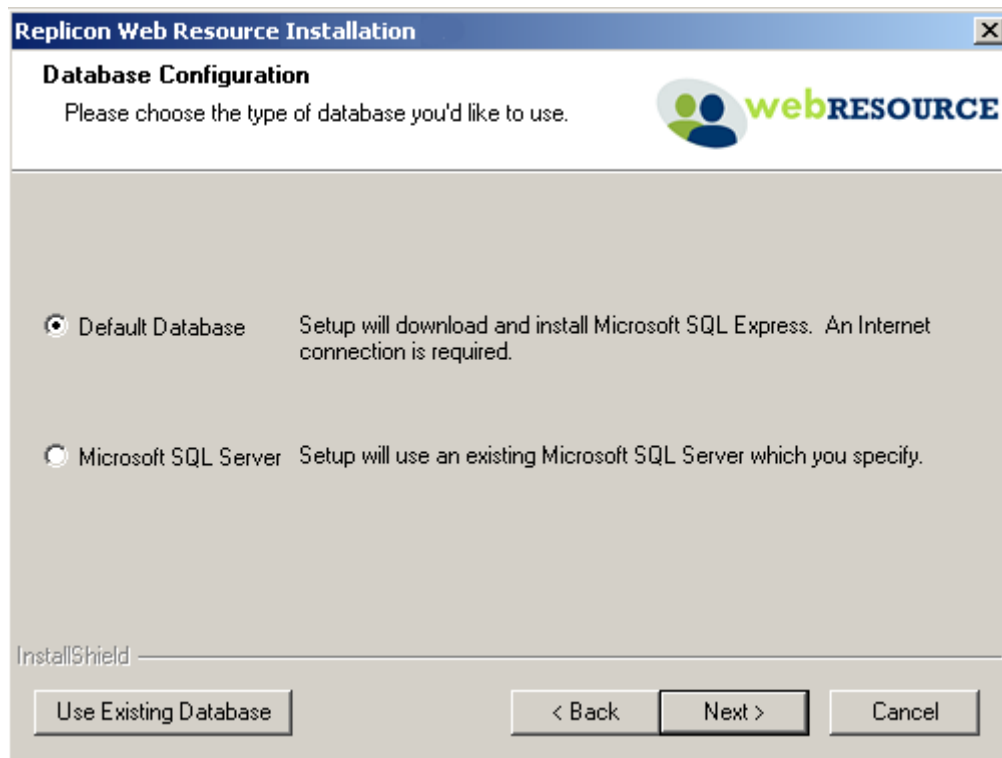


Once you have chosen a database option, select the **Next** button to continue.



8. Select how you would like to configure your database as follows:

- **Default Database**
Select this option to install a new Microsoft SQL Express instance. This new instance will be used to install the Web Resource 2.9 database. Data from Web Resource the previous version will be copied into the new database.
- **Microsoft SQL Server**
Select this option to use an existing instance of Microsoft SQL Server. You will be able to select the appropriate SQL Server configuration on the next screen.



Once you have selected a configuration, select the **Next** button to continue.

9. If you selected **Microsoft SQL Server** in the previous step, you must now define your SQL server settings. Select the appropriate SQL Server instance from the dropdown list provided. The Web Resource 2.9 database will be installed in the selected instance.

Choose whether you want to use Windows authentication to verify that you have the necessary Administrator access to create a new database. This option is useful if you are installing Web Resource using a Windows account that already has Administrator access. If the Windows account does not have Administrator access, uncheck this option and enter a valid administrator login and password.



The instance you selected for the installation must support Windows authentication, and the Windows account being used must have access to that instance.

The installation wizard automatically applies a default database name (`Resourcing`) and database login (`ResourceUser`); however, you can override these defaults using the **Advanced Server Configuration** screen, as detailed below.

Once you have entered the necessary configuration settings, select the **Next** button to continue.

Advanced Server Configuration

To access the **Advanced Server Configuration** screen, select the **Advanced** button. Now enter the following information:

- **SQL Server**
Select the appropriate SQL server instance from the dropdown list provided. The Web Resource 2.9 database will be installed in the selected instance. If the instance you wish to use is not listed, you may type it in the provided field.

The selected SQL server instance name is placed in the `Gentle.config` file in the application installation root directory under the `DefaultProvider, ConnectionString – data source` attribute.
- **Database**
Database is the name you wish to assign the new Web Resource 2.9 database.

The specified database name is placed in the `Gentle.config` file under `DefaultProvider, ConnectionString – initial catalog`.
- **Login Name**
The Login Name is a new user ID, different from the user ID Web Resource creates by default (`ResourceUser`). This new user ID allows the administrator the flexibility to enforce in-house security policies and user ID naming conventions.



The login name specified is stored in the `Gentle.config` file under `DefaultProvider`, `ConnectionString` – user id, and is not encrypted in this file. Access to the `Gentle.config` file should be restricted to administrators and the ASPNET account only.

- **Password**

Password is the password associated with the specified **Login Name**. This password allows the administrator to enforce in-house security policies regarding passwords.

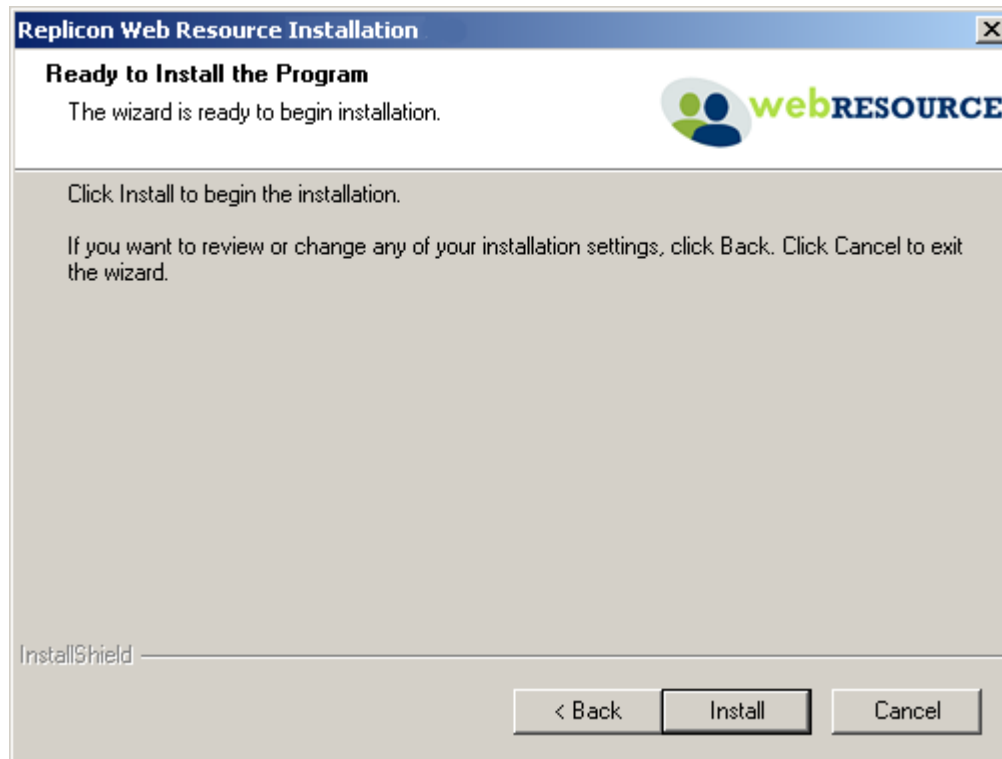
The password specified is placed in the `Gentle.config` file under `DefaultProvider`, `ConnectionString` – password, and is not encrypted. . Access to the `Gentle.config` file should be restricted to administrators and the ASPNET account only.

The screenshot shows a Windows-style dialog box titled "Replicon Web Resource Installation". Inside, there's a section for "Microsoft SQL Server Configuration" with the instruction "Please define your Microsoft SQL Server settings." and the "webRESOURCE" logo. Below this, a message states: "Specify your Microsoft SQL Server, database name, login name, and password. The specified user must have database-owner rights for the specified database." The form includes a dropdown menu for "SQL Server" currently showing "(local)", and three text input fields for "Database:", "Login Name:", and "Password:". At the bottom, there are four buttons: "Simple", "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner of the dialog area.

When you are ready to proceed with the installation, click the **Next** button to complete the installation process.



10. You are now ready to install Web Resource. Select the **Install** button to begin the installation.





What the Upgrade Process does not Support

You cannot upgrade from Full to Trial versions. For example, you cannot upgrade from Full version 2.5 to Trial version 2.9.

You cannot downgrade your installation. Once the data has been moved to the structure used in version 2.9, it cannot be moved back to your previous version. You can use the move database feature of the upgrade process to preserve the previous version's structure and data if you are concerned about the structure changes. If you have tied external processes to the database, these processes will have to be changed to support the new structure.

You cannot upgrade from multiple installations into a single installation. You can use the SQL server data transformation services to move data from multiple databases into a single database. First, choose a site to be the master and upgrade it to 2.9. Upgrade all other installations to 2.9 to ensure that the database structures match. Use the SQL server data transformation services to move data from each installation into the master.

FAQs

Should I uninstall my existing version of Web Resource to upgrade to 2.9?

You should not uninstall Web Resource as this will remove your license file from the system. The upgrade procedure is designed to use a current Web Resource installation.

If you uninstalled Web Resource accidentally your data should still be preserved. The uninstall process does not remove the database from SQL Server, so the data is not lost.

Can I move the Web Resource database after installation?

The database can be disconnected and moved to another SQL server instance after installation. Ensure that the Web Resource database user account is created once the database is moved. The account information is stored in the connection string of the `gentle.config` file.

What if I have both an older full version and the 2.9 Trial version of Web Resource installed?

The upgrade process allows you to choose which installation to upgrade. The Full and 2.9 Trial versions cannot be upgraded into a single 2.9 Full installation.

Can I upgrade over the network?

The install must be run on the PC that you are upgrading. If the database resides on another machine (e.g. a database server) the installation will upgrade the database remotely. An older version database on one server can be upgraded to a version 2.9 database on another server using the move database feature of the upgrade process.

What security settings does Web Resource require?

- *Database security*
Web Resource uses a special database account to access the database. This account requires the database owner role on the Resourcing database. The account login and password must be in the `Gentle.config` file in the Web Resource installation directory.
- *Windows security*
Web Resource is a .Net Web application and uses IIS as the web server. Therefore, the application runs through the ASP.NET worker process as the ASPNET user. The ASPNET user account must have access to the Web Resource installation directories and to SQL Server. This is configured during installation.

Can I run Web Resource against Microsoft Access?

Only the Trial version supports Microsoft Access. Due to scalability issues, Access is not supported with the Full version of Web Resource.