

# **CasePro Suite 2.5 Upgrade Guide**

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# Preface

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## Conventions Used in this Guide

	<p>A Caution appears before procedures or steps that must be strictly observed to avoid a loss of data. For example, a change in server that you need to be on for the next step.</p>
 <b>Note</b>	<p>A Note contains important information to help you perform a procedure or step correctly.</p>

## Introduction

This document is intended for those responsible for upgrading CasePro Case Management, CasePro Redaction and CasePro Workgroup applications. All other users should refer to the respective User Guide or Admin Guide for information appropriate to their role and association with the two applications.

## CHAPTER 1

# Prerequisites

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### System Requirements

Before you begin your upgrade, consult the *AccessPro Suite 2.5 R7 IT Planning Guide* for the minimum hardware and software requirements for CasePro Suite.

### Required IT Information for the CasePro Suite Upgrade

**Error! Reference source not found.** lists the information you will need in order to successfully upgrade CasePro Suite in your environment.

We strongly suggest that you take a few minutes to print and complete **Error! Reference source not found.**

Ensure that you have the checklist completely filled out and readily available prior to upgrading CasePro Suite with a standard configuration.

If you require technical support, the support team will require most of the information contained in this checklist in order to serve you promptly.

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## CHAPTER 2

# CasePro Suite Upgrade Procedures

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## Upgrading CasePro Suite

The upgrade procedure consists of the following steps:

1. [Application Server: Verify the Configuration of Windows Server 2012 R2 and IIS8.0](#) on page 3.
2. [Application Server: Uninstall Old Version of CasePro Suite Software](#) on page 5.
3. [Application Server: Install New Version of CasePro Suite Software](#) on page 5.
4. [Application Server: Upgrade CasePro Suite Database](#) on page 10.
5. [Application Server: Verify Configuration of File Repository](#) on page 14.
6. [Workstation: Setup CasePro Suite for Web Use](#) on page 18.
7. [Workstation: Manage Licenses](#) on page 20.

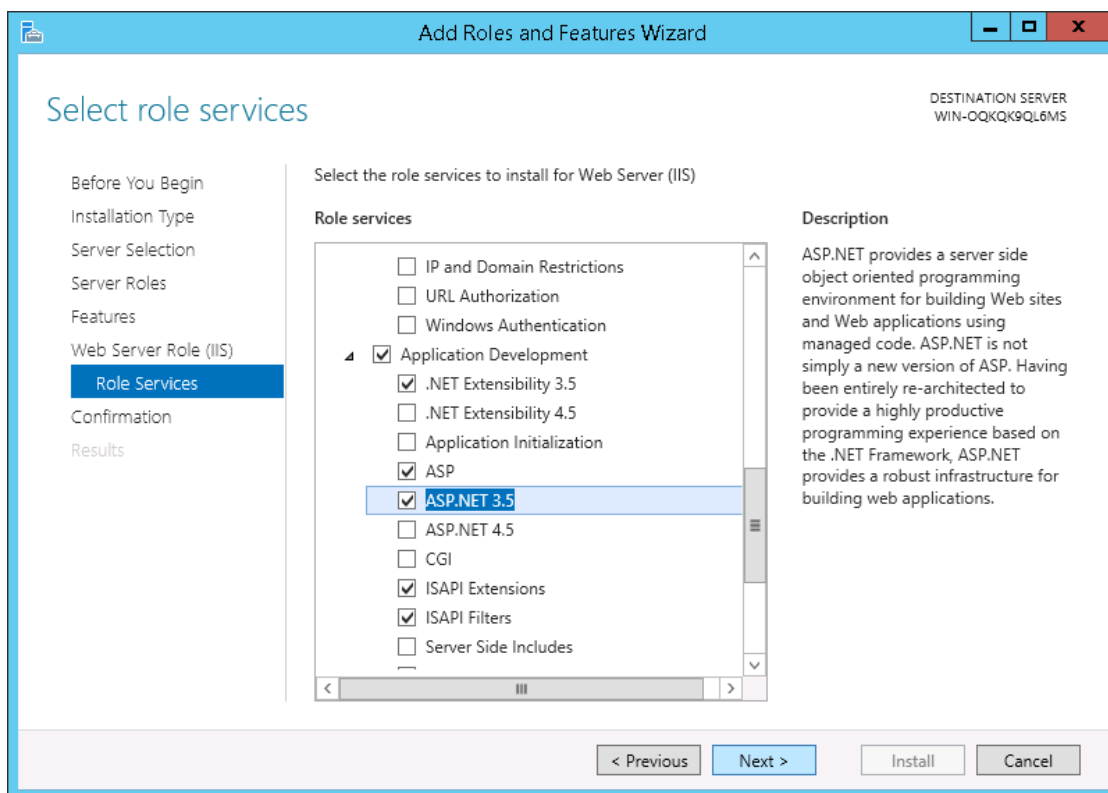
### 1. Application Server: Verify the Configuration of Windows Server 2012 R2 and IIS8.0



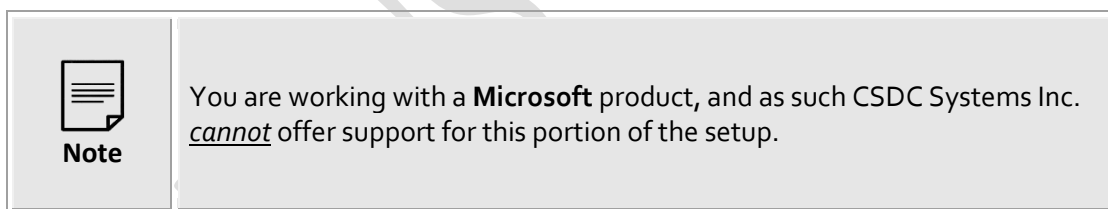
If you need to configure Windows Server 2008 R2 and IIS 7.0, see [Appendix A: Configure Windows Server 2008 and IIS7.0](#) on page 23.

This guide assumes that all hardware remains the same and that only CasePro Suite Software is being upgraded.

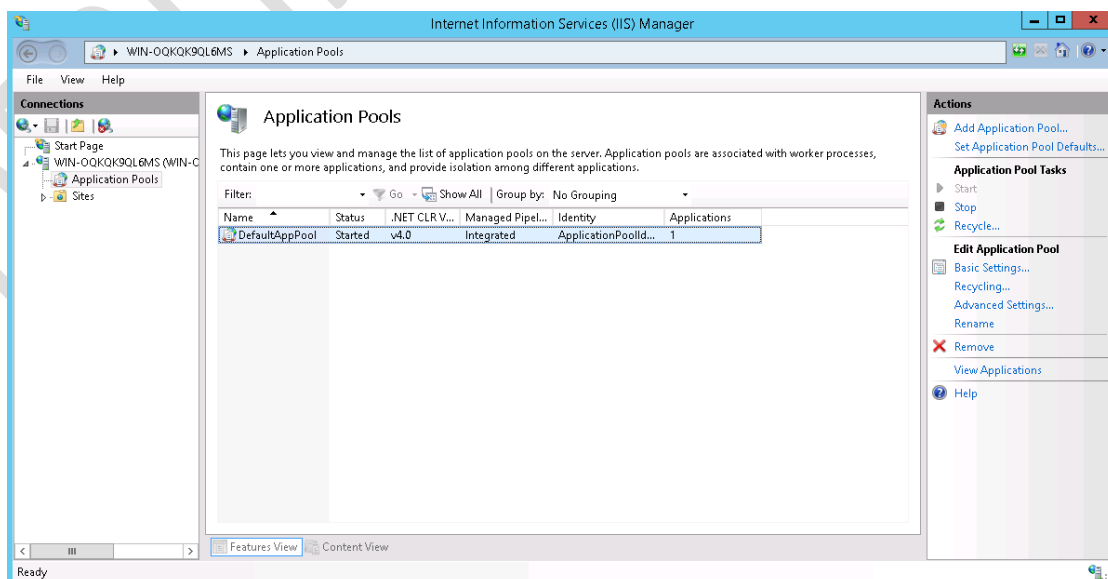
- a. Open the **Server Manager**, and select **Add roles and features**.
- b. In the **Before You Begin** window, click **Next >**.
- c. In the **Select installation type** window, keep the default **Role-based or feature-based installation** option, and then click **Next >**.
- d. In the **Server Pool** box, click the server to which you want to add the role, and click **Next >**.
- e. Expand the **Web Server (IIS)** group, expand the **Web Server** group, and then expand the **Application Development** group.
- f. Add the following roles to the list of **Web Server (IIS) Roles**: **ASP**, **.Net Extensibility 3.5**, and **ASP.NET3.5**.



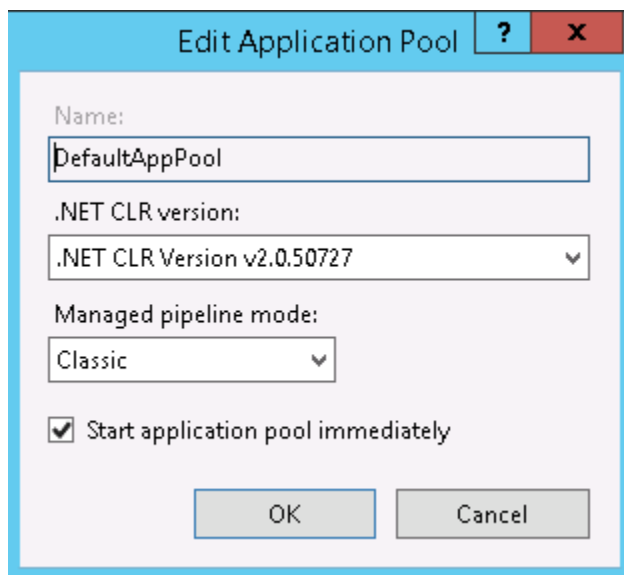
- g. Click **Next >**, and then click **Install**.



- h. Open the **Internet Information Services (IIS) Manager**, and browse to **Application Pools**.



- i. For the **DefaultAppPool** that will be used by CasePro Suite, in the **Actions** pane, click **Basic Settings**.
- j. In the **Edit Application Pool** window, do the following:
  - Set the **.NET CLR version** to **.NET CLR Version v2.0.50727**.
  - Set the **Managed pipeline mode** to **Classic**.



## 2. Application Server: Uninstall Old Version of CasePro Suite Software

- a. On the Server where CasePro Suite is installed, open the **Control Panel**.
- b. Click **Add or Remove Programs**.
- c. Click **Privasoft CasePro**, and then click **Remove**.
- d. Restart the Server.

## 3. Application Server: Install New Version of CasePro Suite Software

- a. Browse to <http://support.csdcsystems.com>, and log in using credentials provided by support staff.

If you do not have support portal credentials, submit the request for credentials. You can also contact Freedom of Information Customer Support for immediate assistance.

- b. Navigate to **Download Product**, and download the latest version of CasePro Suite to your application server.
- c. Browse to the directory where the setup file has been supplied and extract the contents of the zip file.
- d. Open the contents of the folder and browse to **Suite Install** folder.
- e. Double-click **PrivasoftCasePro.msi**.

- f. On the **Privasoft CasePro Setup** Welcome screen, click **Next**.
- g. Read the license, select the appropriate agreement option, and then click **Next >**.  
If you do not agree with the license or any portion thereof, contact CSDC Systems Inc. for further assistance.



You must select the type of database that you intend to use. You cannot change this later without a complete re-installation of CasePro Suite.

- h. If you want to change the location of the CasePro installation, click **Browse**, and then browse to the location where you want to install CasePro, and then click **OK**.



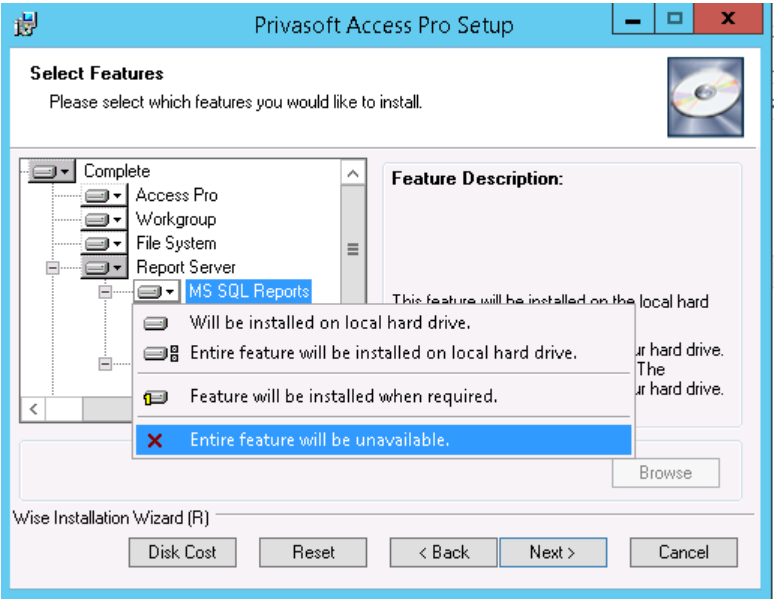
**Note**

This manual assumes that you will install CasePro to the default location:  
**C:\Program Files (x86)\Privasoft**

- i. Do one of the following :

If your database is	Do this
SQL Server	Skip to step j.



If your database is	Do this
Oracle	<p>Click the <b>MS SQL Reports</b> option arrow, and click <b>Entire feature will be unavailable</b>.</p>  <p>Click the <b>Oracle Reports</b> option arrow, and click <b>Will be installed on local Hard Drive</b>.</p>

- j. Click **Next >**.
- k. Type the pre-configured **SERVER** name where the software will reside. This is part of the URL for how users will access the Web site.  
If the Web site uses a non-standard port for access, specify the port number now.
- l. Click **Next >**.

**Note**

In the **Component URLs** window, review the paths.  
For your reference later, make note of URLs settings for future management purposes; however, ignore the Portal API URL settings.

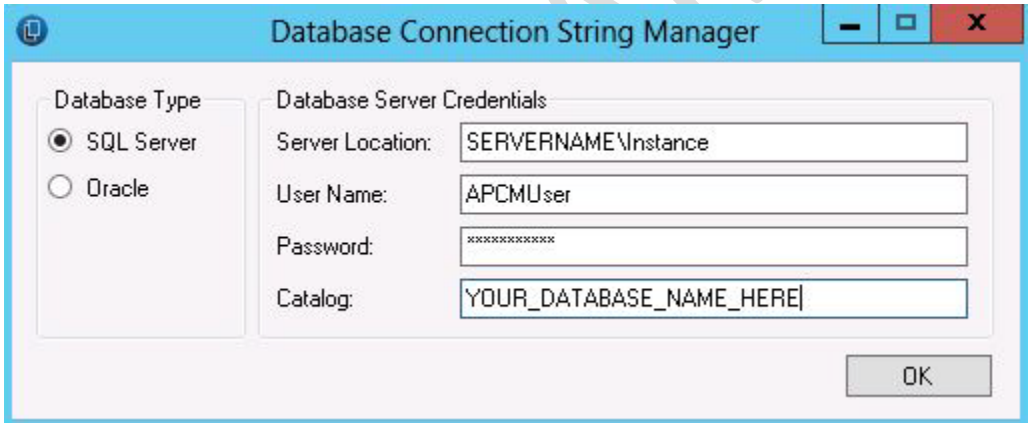
- m. Once you have reviewed and noted the paths, click **Next >**.
- n. On the **Ready to Install the Application** screen, click **Next >**.

CasePro Suite may take a while to install depending on the application server load at that time.

Once the installation process is complete, you must provide the details for the CasePro Case Management Application Server to connect to the database.

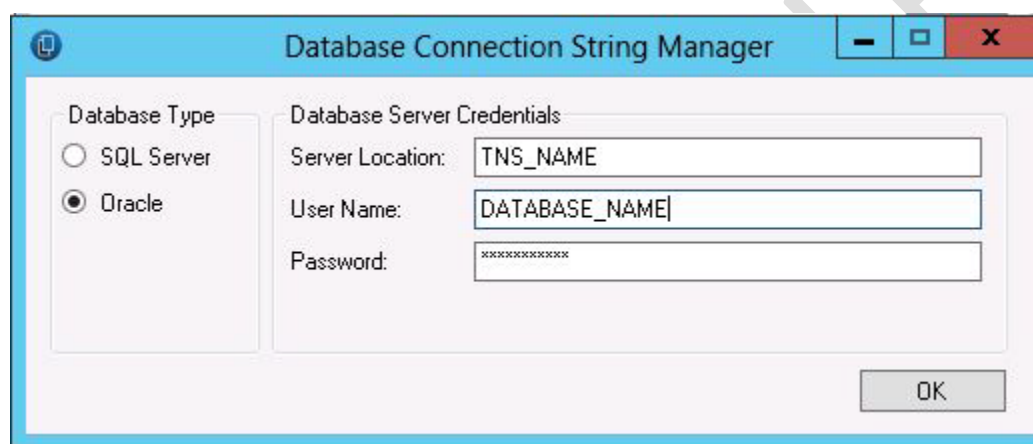
- o. Do one of the following:

If your database is	Do this
SQL Server	<p>From the <b>Database Type</b> group, click <b>SQL Server</b>.</p> <p>In the <b>Server Location</b> box, type the name of the MS SQL Server.</p> <p>In the <b>User Name</b> box, unless otherwise specified by your Database Administrator, type <b>APCMUser</b>.</p> <p>In the <b>Password</b> box, type the default password for the above username, which is <b>Novisad123#</b>.</p> <p>In the <b>Catalog</b> box, type the name of the database itself that is on the MS SQL Server.</p>

The screenshot shows a window titled "Database Connection String Manager". It has a "Database Type" section with two radio buttons: "SQL Server" (selected) and "Oracle". To the right is the "Database Server Credentials" section with four text input fields: "Server Location" (containing "SERVERNAME\Instance"), "User Name" (containing "APCMUser"), "Password" (containing "xxxxxxxx"), and "Catalog" (containing "YOUR\_DATABASE\_NAME\_HERE"). An "OK" button is located at the bottom right of the dialog.

If your database is	Do this
Oracle	<p>From the <b>Database Type</b> group, click <b>Oracle</b>.</p> <p>In the <b>Server Location</b> box, type the TNS name of the ORACLE Server.</p> <p>In the <b>User Name</b> box, type the database name.</p> <p>In the <b>Password</b> box, type the default Admin password for the above database.</p>



The screenshot shows a window titled "Database Connection String Manager". It has two main sections. The first section, "Database Type", contains two radio buttons: "SQL Server" and "Oracle", with "Oracle" selected. The second section, "Database Server Credentials", contains three text input fields: "Server Location" with the value "TNS\_NAME", "User Name" with the value "DATABASE\_NAME", and "Password" with masked characters "XXXXXXXX". An "OK" button is located at the bottom right of the dialog.

- p. Click **OK**.
- q. Once CasePro is installed successfully, click **Finish**.

**Note**

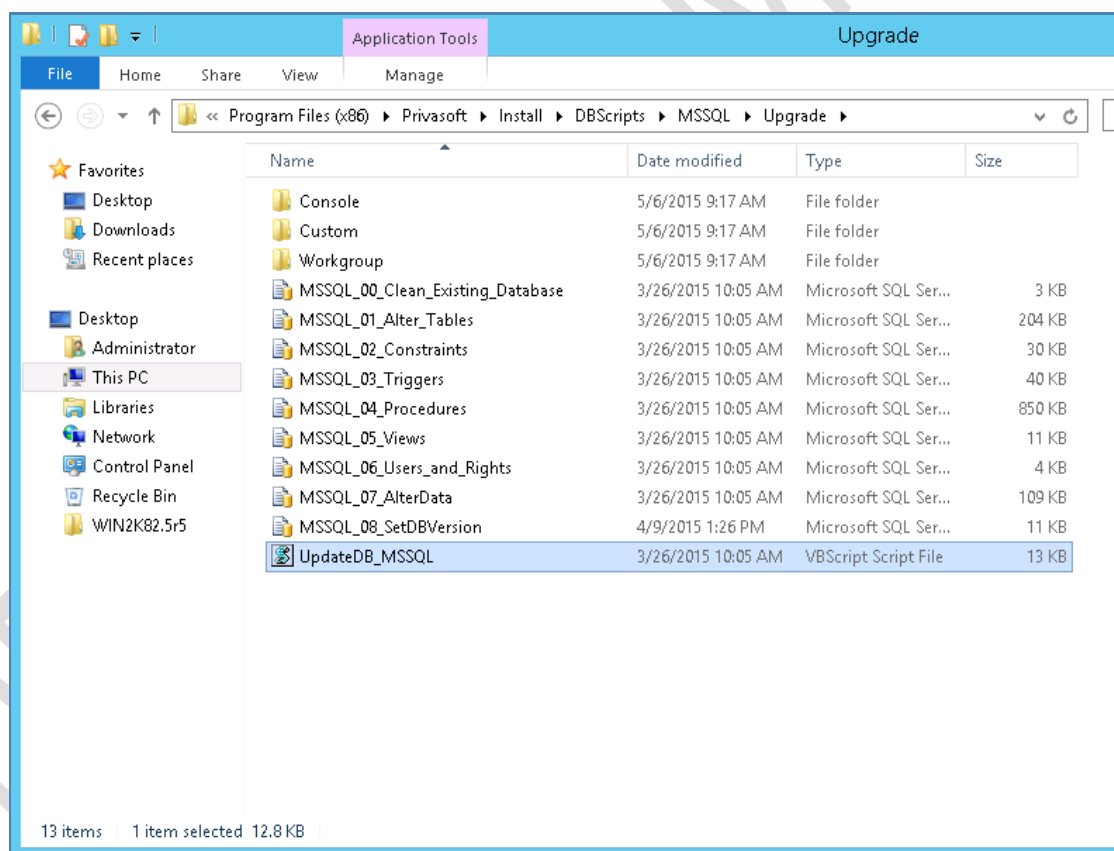
Several black command prompt windows appear. These windows close automatically. **DO NOT CLOSE THESE WINDOWS MANUALLY.**

- r. Do one of the following:

If your database is	Do this
SQL Server	Continue to task 4 <i>Application Server: Upgrade CasePro Suite Database</i> on page 10.
Oracle	Go to <b>Error! Reference source not found.</b> on page <b>Error! Bookmark not defined..</b>

#### 4. Application Server: Upgrade CasePro Suite Database

- Open the CasePro Suite installation folder. By default, this folder is located in **C:\Program Files(x86)\Privasoft\Install\DBScripts\**.
- Open the appropriate database scripts folder for **MSSQL** or **Oracle**.
- Open the **Create** folder.



- To upgrade an existing database, double-click **UpdateDB\_[Database\_Type].vbs**.

- e. Specify the type of database server you are running, and then click **OK**:

If your database is	Do this
SQL Server	In capital letters, type <b>MS2008</b> .
Oracle	In capital letters, type <b>ORACLE</b> .

- f. Specify where the database is to upgraded, and then click **OK**:

If your database is	Do this
SQL Server	In capital letters, type your database server name.
Oracle	In capital letters, type your TNS name.

- g. In capital letters, type the database name to upgrade, and then click **OK**.

- h. Specify the user name of the Database User, and then click **OK**:

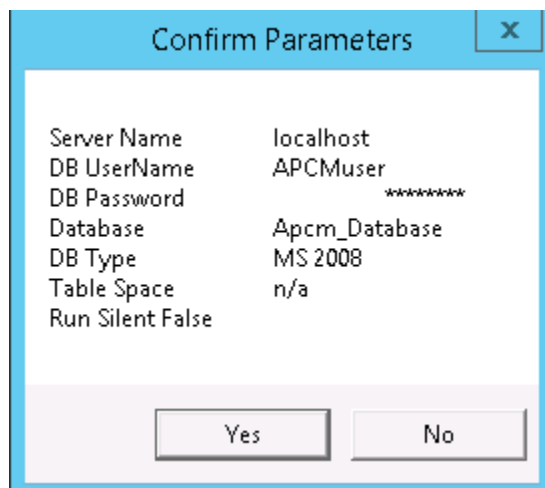
If your database is	Do this
SQL Server	Confirm that the MS SQL user name is the correct Database Administrator user name to use. By default: <i>APCMUser</i>
Oracle	Confirm that the Oracle <b>SYSTEM</b> user name is the correct Database Administrator user name to use.

- i. Confirm the **Password** (by default: *Novisad123#*) for the Database Administrator user account, and then click **OK**.

- j. Do one of the following:

If your database is	Do this
SQL Server	Skip to step k.
Oracle	Type the tablespace name where the database is being created, and click <b>OK</b> .

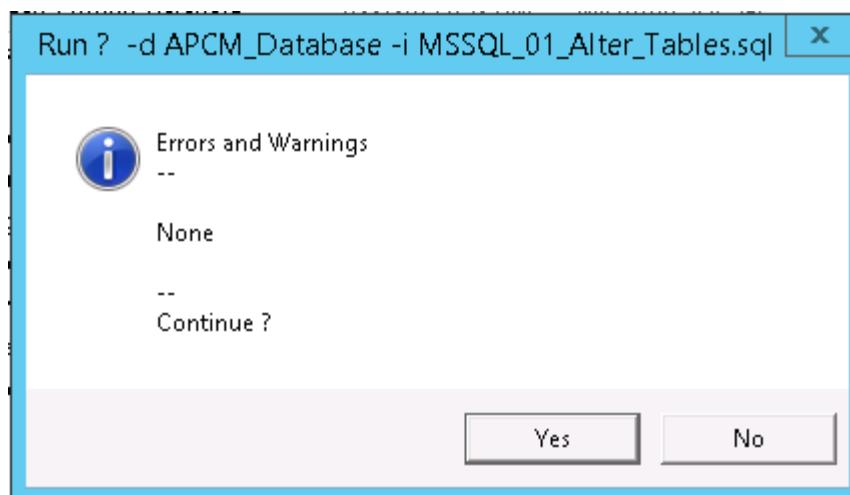
- k. In the **Run Interactive** window, type **Yes**, and then click **OK**.
- l. Confirm all the parameters of this database setup, then click **YES**.



The server runs the database upgrade scripts in the required order. While each script is run, you will see a blank command prompt window that will automatically close when that step is done.

- m. When each script is complete, you are presented with a results window. If there are no errors, click **YES**.

The server loops through the above process eight (8) times. For each step, confirm that there are no errors, and click **Yes** to continue.

**Note**

When upgrading an Oracle database, warnings occur after the 4<sup>th</sup> script. This is normal as the required procedures and functions are created in the next steps.

There will be 14 warnings saying either of the following:

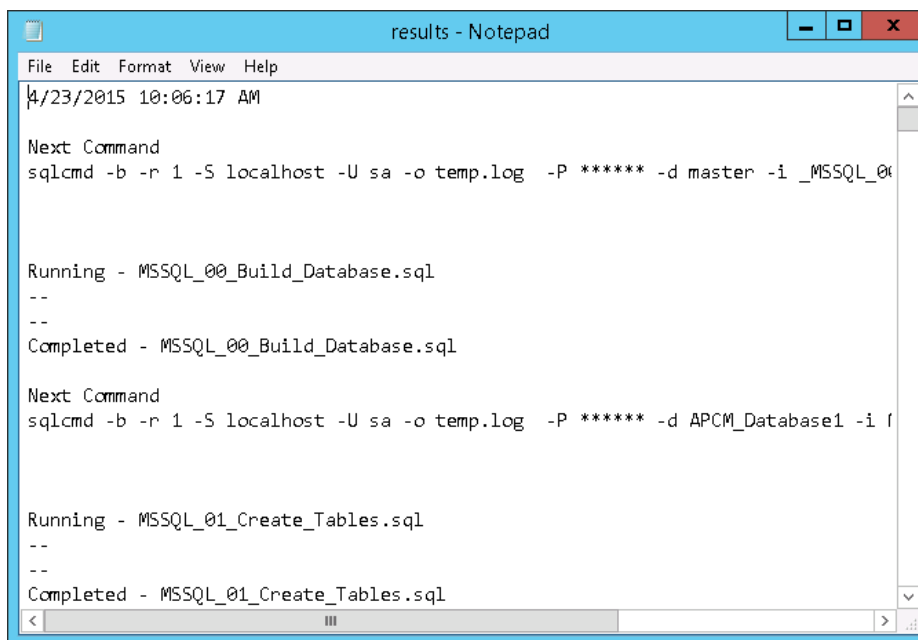
- *Warning: Function created with compilation errors, OR*
- *Warning: Procedure created with compilation errors.*

For these warnings, click **YES** to continue.

- n. Once the database upgrade is complete, you see a window indicating the final setup outcome. Click **OK**.

A log file displays as the final step in the database creation process.

- o. Review the log for any errors. If there are no errors, save the file for future reference. However, if there are errors in the log, contact Freedom of Information Customer Support for assistance.



```

File Edit Format View Help
4/23/2015 10:06:17 AM

Next Command
sqlcmd -b -r 1 -S localhost -U sa -o temp.log -P ***** -d master -i _MSSQL_00



Running - MSSQL_00_Build_Database.sql
--
--
Completed - MSSQL_00_Build_Database.sql

Next Command
sqlcmd -b -r 1 -S localhost -U sa -o temp.log -P ***** -d APCM_Database1 -i f

Running - MSSQL_01_Create_Tables.sql
--
--
Completed - MSSQL_01_Create_Tables.sql

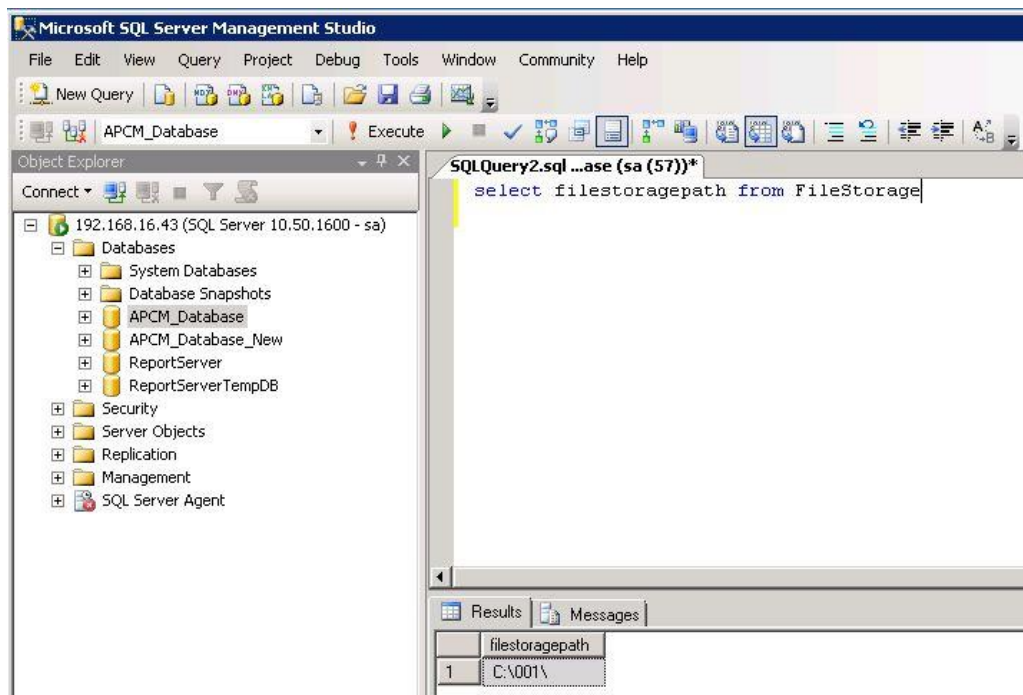
```

## 5. Application Server: Verify Configuration of File Repository


 <p>Note</p>	<p>If you want to change the location of the file repository, follow the instructions in <i>Appendix D, <b>Error! Reference source not found.</b></i> on page <b>Error! Bookmark not defined.</b> Then, configure the file repository as described in the procedure below.</p>
 <p>Note</p>	<p>To allow CasePro users to properly access the file repository, you must ensure that the <b>IIS Application Pool</b> user has <u>full</u> control to the file storage.</p>

- Determine the location of file repository by running the following query against the upgraded CasePro Suite Database: ***select Filestoragepath from Filestorage***



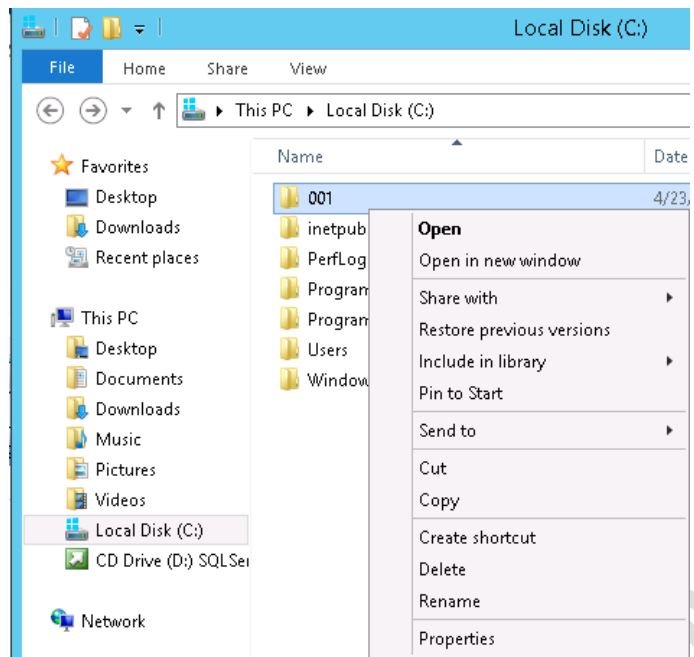


- b. Take note of **FilestoragePath** value.
- c. In Windows Explorer, browse to the location of your Filestorage.

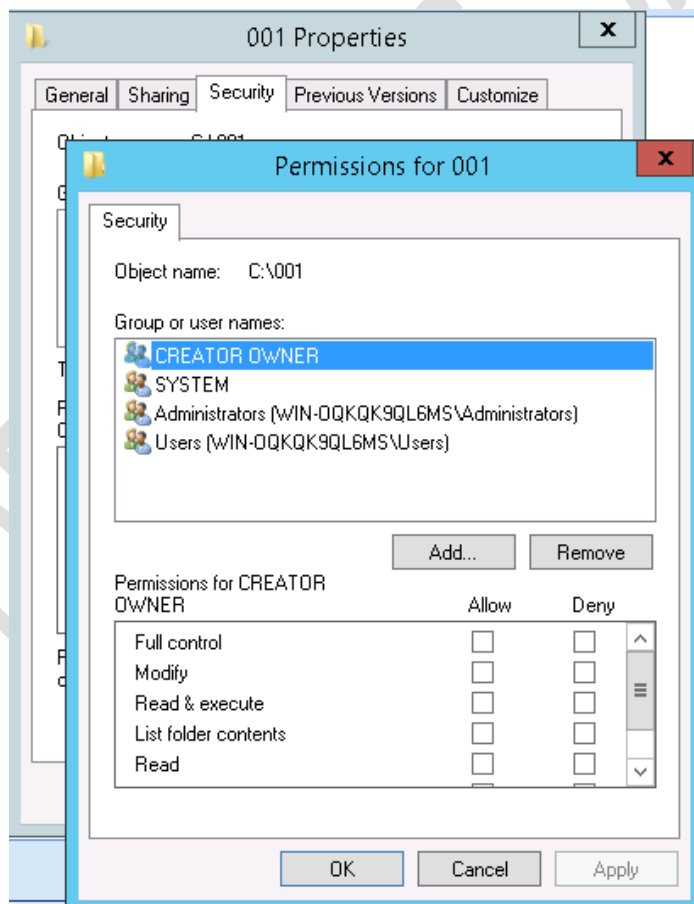
  
**Note**

For this example, the default value will be used: C:\001

- d. Right-click the **001** file storage folder ,and click **Properties**.

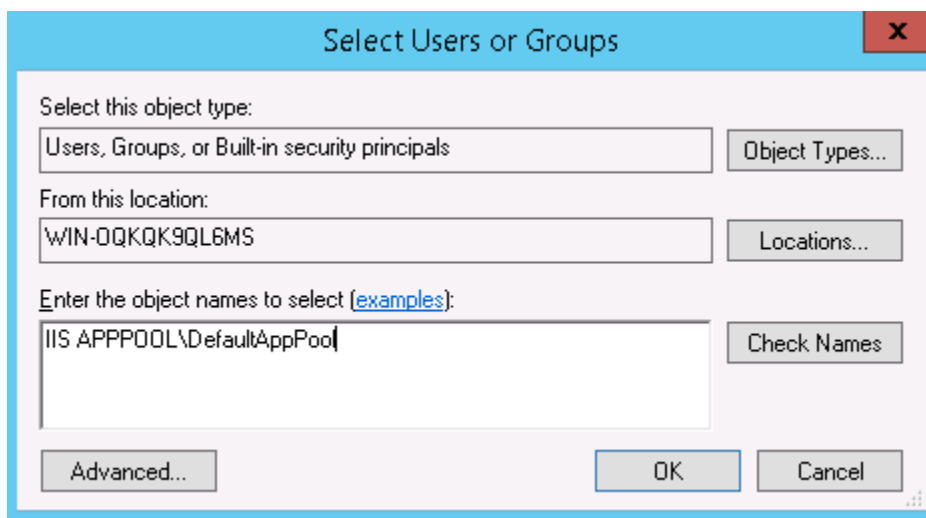


- e. Click the **Security** tab, and then click **Edit**.
- f. Click **Add**.

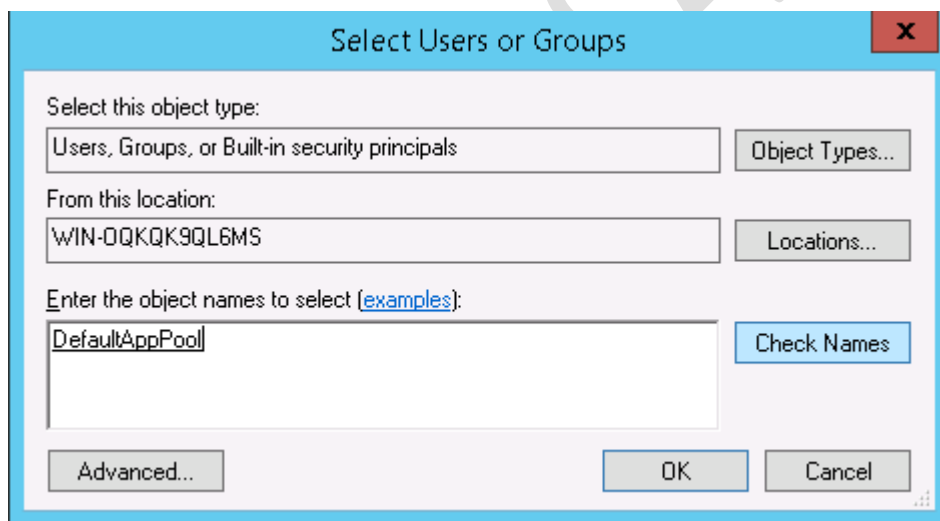


- g. In the **Enter the object names to select** box, type the name of the application pool used by CasePro.

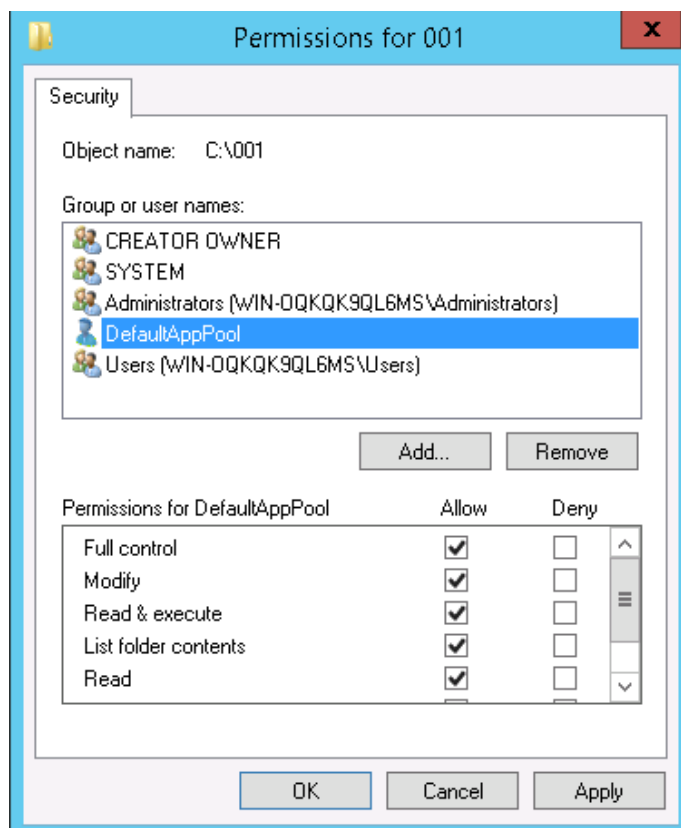
By default, this is the IIS APPPOOL\DefaultAppPool.



- h. Click **Check Names**.



- i. Click **OK**.
- j. In the **Permissions for DefaultAppPool** box, click **Allow Full Control**, click **Apply**.



- k. Click **OK**.

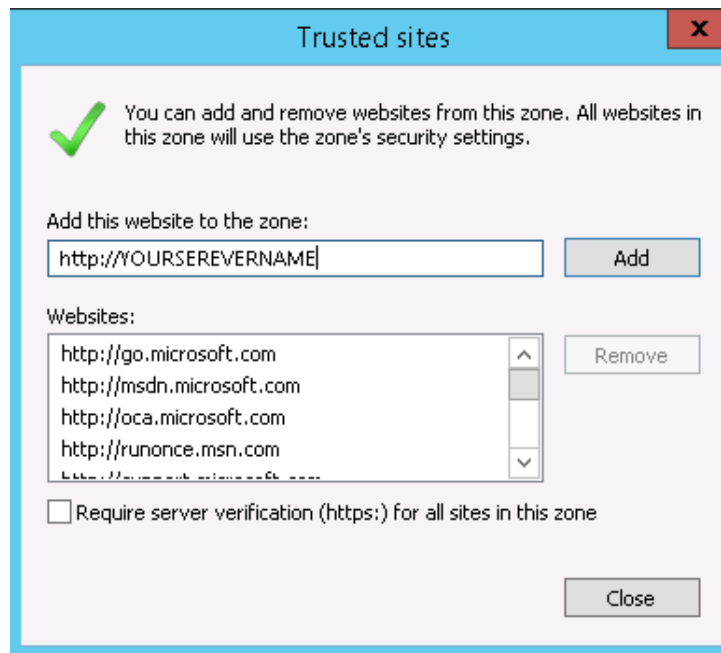
## 6. Workstation: Set up CasePro Suite for Web Use

- a. Open a supported browser, and go to the following URL:  
**http://<YourServerName>/privasoft/**  
You are re-directed to the CasePro Login Screen. If not, click the *click-here* link.
- b. Before logging in, add the application server to the trusted sites and compatibility view Web sites list.
  - i. Click the **Tools** icon (⚙️) in the top right corner of your browser window.
  - ii. Click **Internet Options**.
  - iii. Click the **Security** tab, and then click **Trusted Sites**.
  - iv. Click **Sites**.

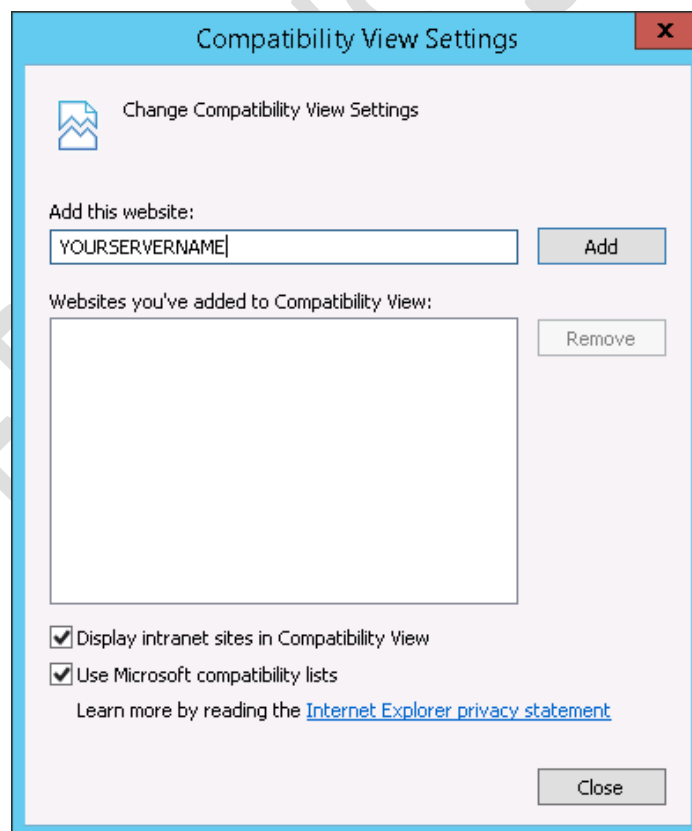


You may need to click to clear the *Require server verification for all sites in this zone* check box before you can add your Web site.

- v. Type the name of your IIS server, and then click **Add**.



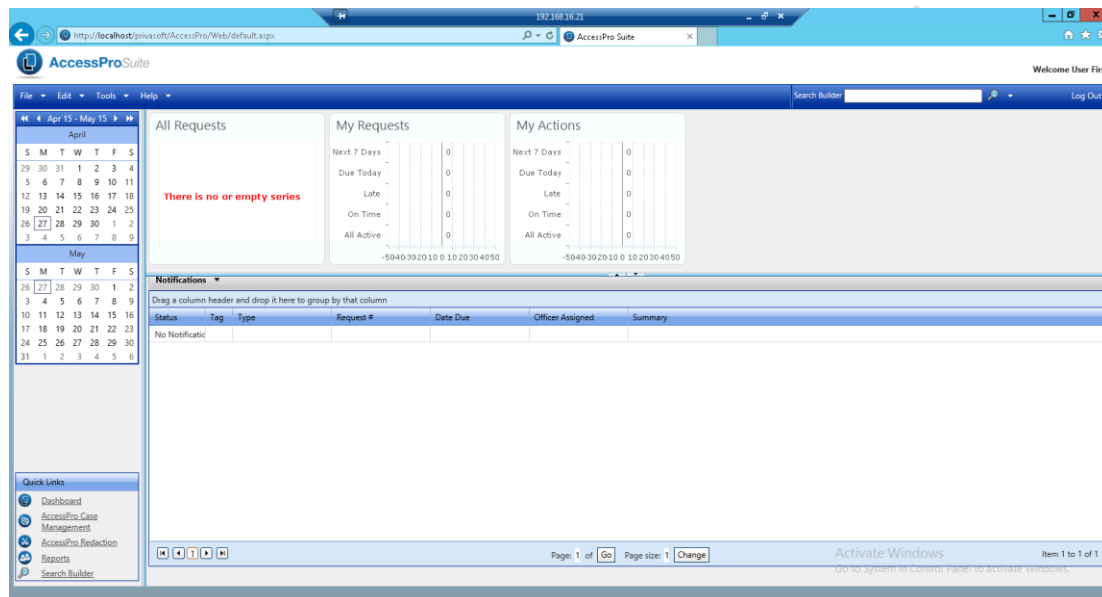
- vi. Click **Close**, and then click **OK**.
- vii. Click the **Tools** icon (⚙️), and click **Compatibility View settings**.
- viii. Type the name of your IIS server.



- c. Click **Add**, and then click **Close**.

- d. On the **CasePro Suite** login page, login using the default Administrator credentials, and then click **Login**:
  - In the **Username** box, type **admin**.
  - In the **Password** box, type **password**.

You see the **CasePro Dashboard**.



## 7. Workstation: Managing Licenses



### Note

If the following has not changed during CasePro Suite Upgrade, your existing licenses will remain intact:

- Server Name
- Server Domain
- Server IP Address

If any of the above have changed, you will need to re-apply for new licenses.

Initially, two license requests are required: **Demo** licenses to unlock the software and **Production** licenses.

**To apply for license certificates:**

- a. From the **Tools** menu, click **Administration**.
- b. Click **Licensing**.

- c. Under the **Apply For License** group, from the **Product** list, click the product for which you wish to apply for license (eg. CasePro Case Management).
- d. From the **License Type** list, click the type of license you need (e.g.Demo).
- e. In the **Number** box, type the number of licenses required (30 for Demo or #of purchased licenses for Production).
- f. Once you have filled out all three fields, click **Continue**.

You are presented with a textbox containing information to apply for your license.

**Apply For License**

**Product:** AccessPro Case Management ▼

**License Type:** Demo ▼

**Number:** 30

Continue


Please copy the information below and send it to your software vendor:

Product: AccessPro Case Management  
License: Demo  
Number: 30  
Info 1: YOURSERVERNAME  
Info 2: WORKGROUP  
Info 3: fe80::c137:c3ed:8a39:871&12

- g. Copy the contents of the textbox.
- h. Browse to <http://support.csdcsystems.com>, and log in using the credentials provided by support staff.

If you do not have support portal credentials, submit the request for credentials. You can also contact Freedom of Information Customer Support for immediate assistance.

- i. Under **Support Issues**, Click **Add New Issues**.
- j. On the **Support** page, complete all the necessary fields, and then paste the generated information into the WYSIWYG text box.



**Note**

DO NOT MODIFY ANY OF THE GENERATED INFORMATION.

- k. In CasePro, repeat steps c to g for each component for which you require a license, and paste the generated information into the WYSIWYG text box on the Support page.

Typically, CasePro Suite requires a total of four License requests:

- CasePro Case Management Demo
- CasePro Case Management Production
- CasePro Redaction Standard Demo
- CasePro Redaction Standard Production

**Support Issues**

- Add New Issues
- List Open Issues
- List All Issues
- Search Issues

**Resources**

- Videos
- Product Information
- Download Product
- Newsletters Archive

**Training**

- Training Center

**User Groups**

- ATIP
- Central
- Eastern
- International
- Western
- Forum

Client Name: (Add/Remove) LW Test Organization

Issue Type: Issue

Category: Freedom of Information

Module: AccessPro Case Management

Confidential Information: Yes

Send Copy To: (Use , between emails) j.smith@csdcscsystems.com

Case Title: (Limit to 250 characters)

Bug/Enhancement Description\*: (Limit to 4000 characters or send as attachment)

Attach A File

Call Received From: Add Caller

Severity: 4 - Minor Internal: Yes

Environment:

Release Number: 2.5R4 (2.5.4.18)

Required in Release:

Required by: (MM/DD/YYYY)

Product: AccessPro Case Management  
License: Demo  
Number: 30  
Info 1: YOURSERVERNAME  
Info 2: WORKGROUP  
Info 3: fe80:c137:c3ed:8a39:871%12

Product: AccessPro Redaction Standard  
License: Demo  
Number: 30  
Info 1: YOURSERVERNAME  
Info 2: WORKGROUP  
Info 3: fe80:c137:c3ed:8a39:871%12

body p

Submit your request Reset

### I. Click **Submit your request**.

CSDC Support Staff will generate your licenses and provide all necessary information to process your license certificate.

## To Process License Certificates

- In CasePro, from the **Tools** menu, click **Administration**, and then click **Licensing**.
- Once you have received the key back from CSDC Systems Inc., under the **Process License Certificate** group, from the **Product** list, click the product for which you want to process a license (eg. CasePro Case Management).
- From the **License Type** list, click the type of license that you want to process (e.g. Demo).
- In the **Number** box, type the number of licenses.
- In **Additional Information** box, type the information supplied to you by CSDC.
- In the **Certificate** box, type the license certificate number supplied to you by CSDC.
- If all the information is correct, you see the following message: *Your certificate has been processed.*

**Process License Certificate**

Product: AccessPro Redaction Standard

License Type: Demo

Number: 30

Additional Information: 1512

Certificate: 06137-90377-44767-78628-77452-96771-04623

Your certificate has been processed

Continue

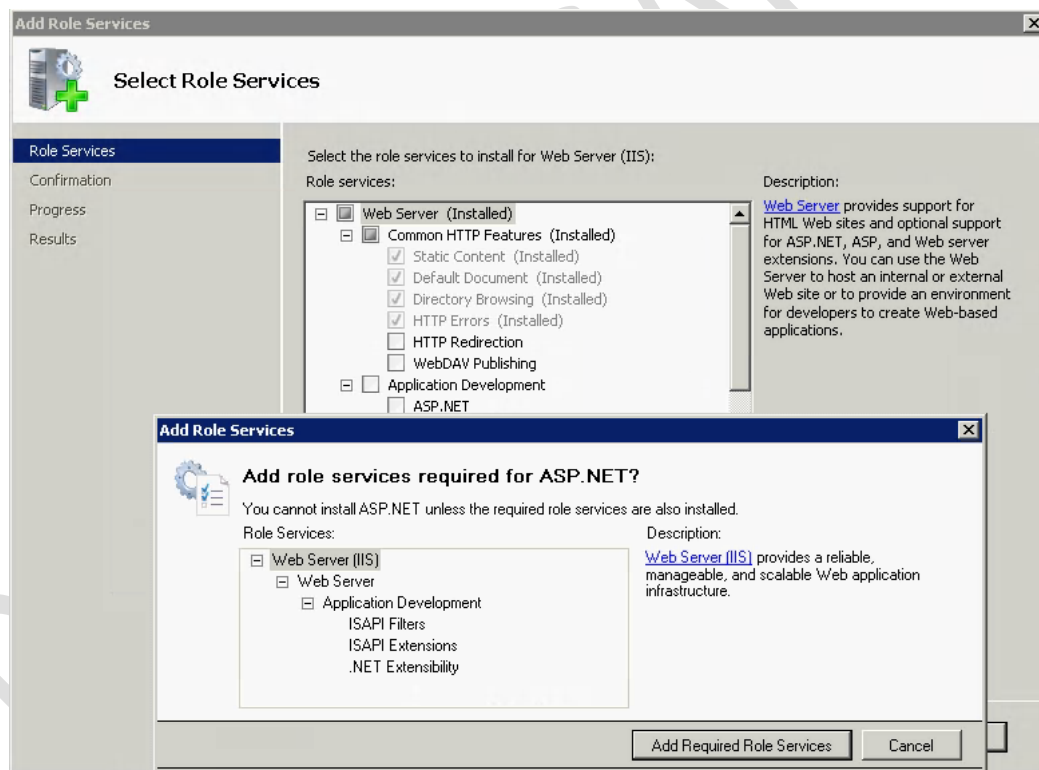


## APPENDIX A

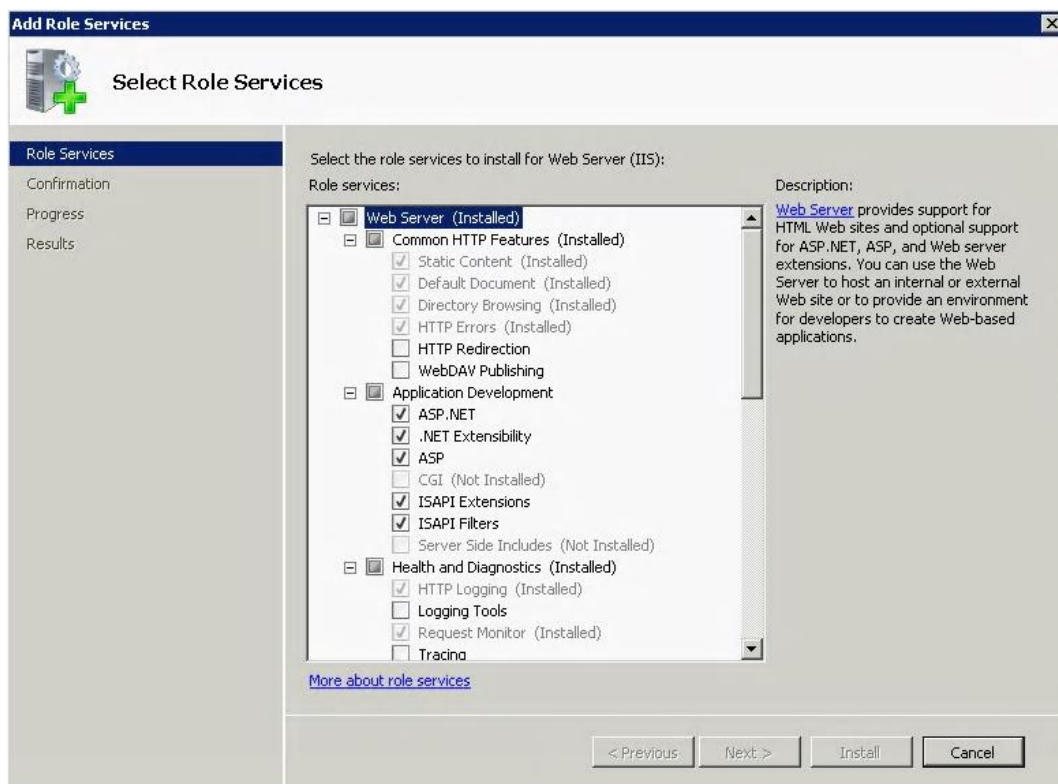
# Application Server: Configure Windows Server 2008 R2 and IIS 7.5

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1. Open the **Server Manager**, click the **Roles** node, and then click **Add roles**.
2. Click **Next >**.
3. Select the **Application Server** check box.
4. Select the **Web Server (IIS)** check box.
5. Click **Next >** for the next four windows.
6. Under **Web Server (IIS)**, click **Add Role Services**.
7. Under the **Application Development** group, select **ASP.NET**.




8. Click **Add Required Roles Services**.
9. Click **ASP**.



10. Click **Next >**, and then click **Install**.

11. Click **Close**.



**Note**

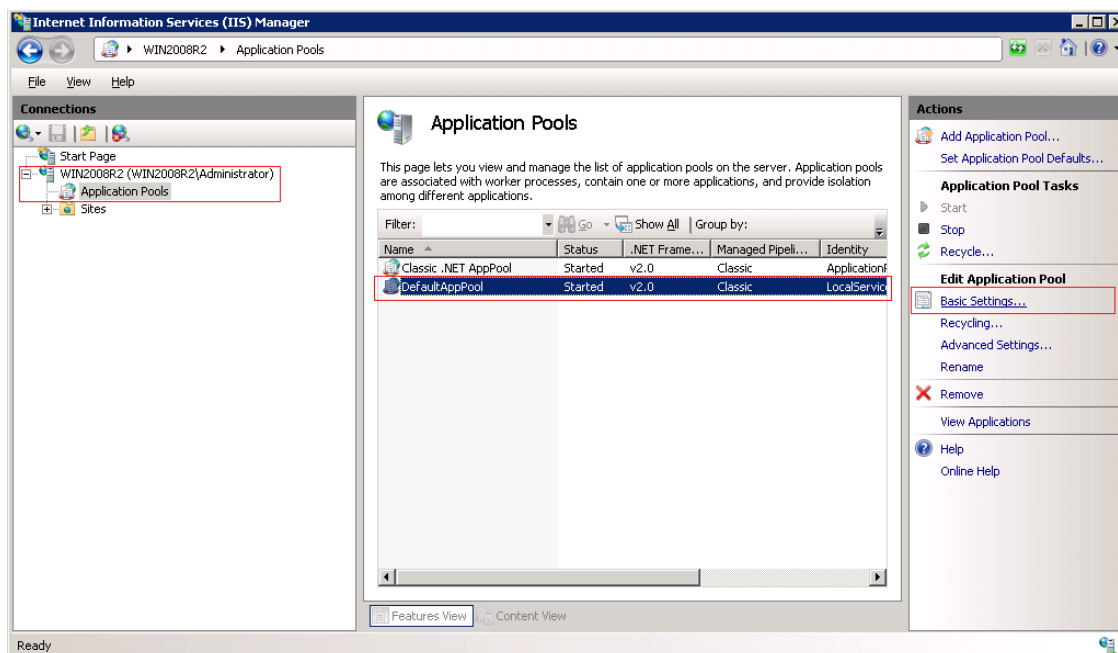
You are working with a **Microsoft** product, and as such CSDC Systems Inc. cannot offer support for this portion of the setup.

12. On your application server, open the **IIS Manager**.

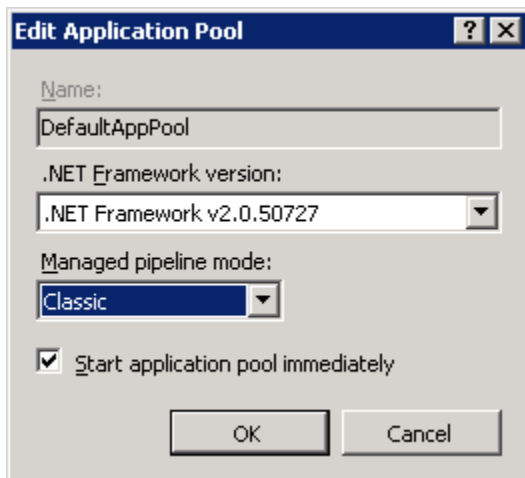
13. In the **Connections** pane, expand your server by name.

14. Click the **Application Pools** node.

15. In the center pane, click the **DefaultAppPool** (this is where the application should reside).



16. In the right pane, click **Basic Settings**.

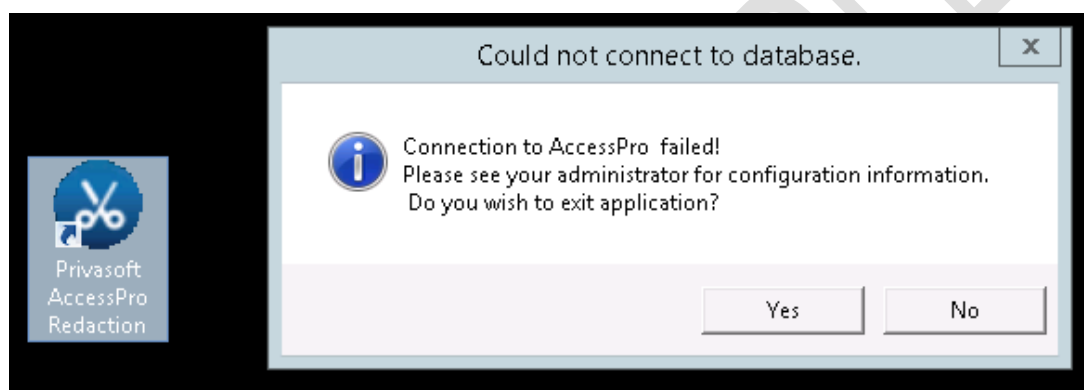


17. From the **Managed pipelines mode** list, click **Classic**.
18. Click **OK**.
19. Perform an IISRESET for the changes to take complete effect.

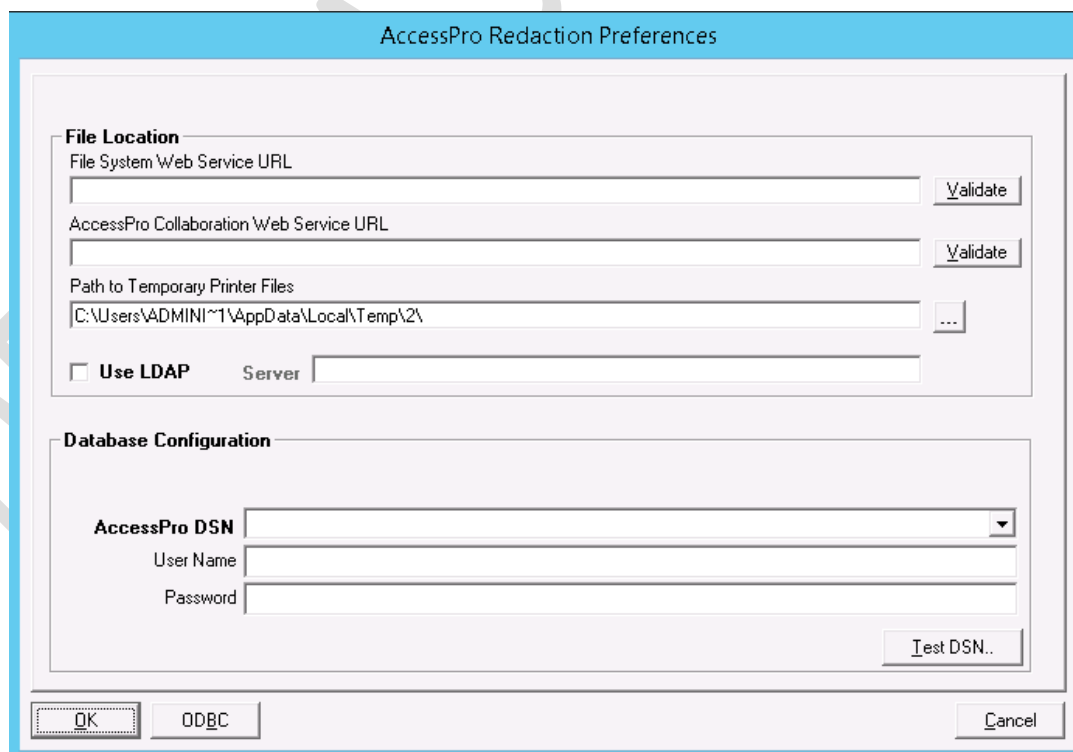
## APPENDIX B

# Workstation: Configure CasePro Redaction and the Database Connection

1. On the desktop, double-click the **Privasoft CasePro Redaction** icon.



2. Click **No** to open the **CasePro Preferences** window.

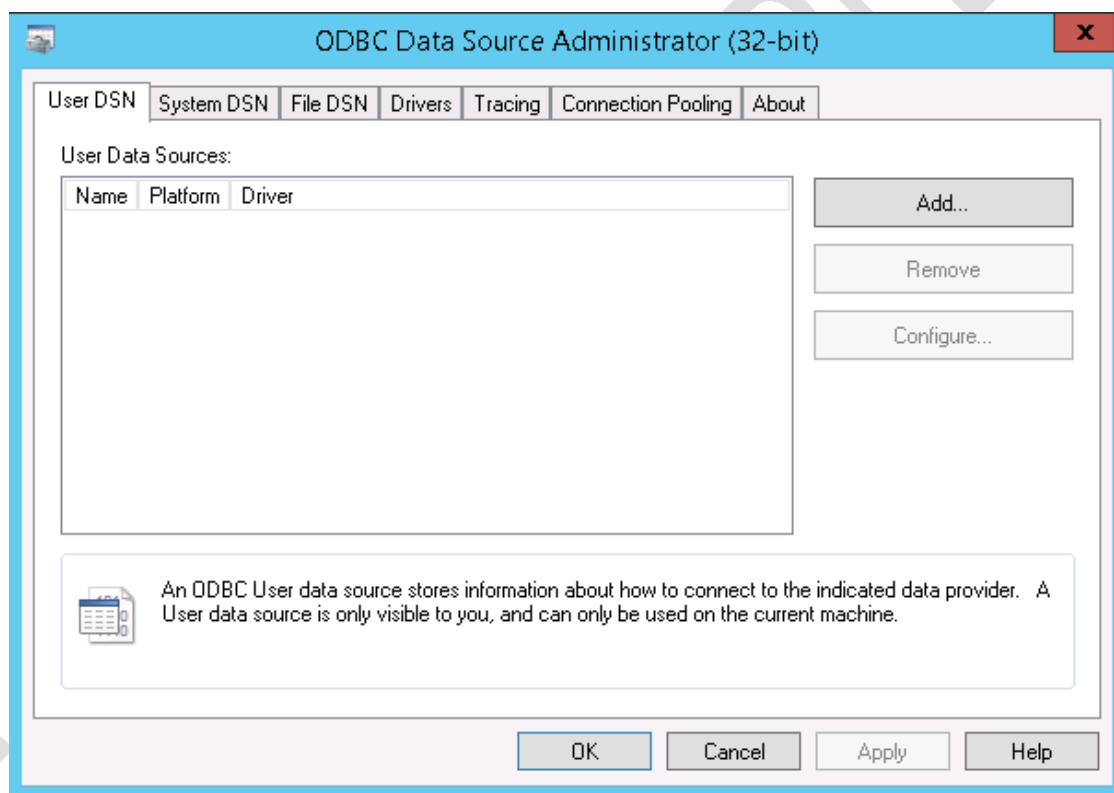


3. In the **File System Web Service URL** box, type <http://<YourServerName>/Privasoft/CasePro/FileSystem/filesystem.aspx>, and click **Validate**.
4. In the **CasePro Collaboration Web Service URL** box, type <http://<YourServerName>/Privasoft/CasePro/Collaboration.aspx>, and click **Validate**.
5. Copy the path specified in the **Path to Temporary Printer Files** box.
6. Open **Windows Explorer**, and paste the path in the address bar, and press **Enter**.
7. Right-click in the folder, and then click **Properties**.
8. Click the **Security** tab.
9. If necessary, assign **Allow Full Control** permissions to the **Users** group.

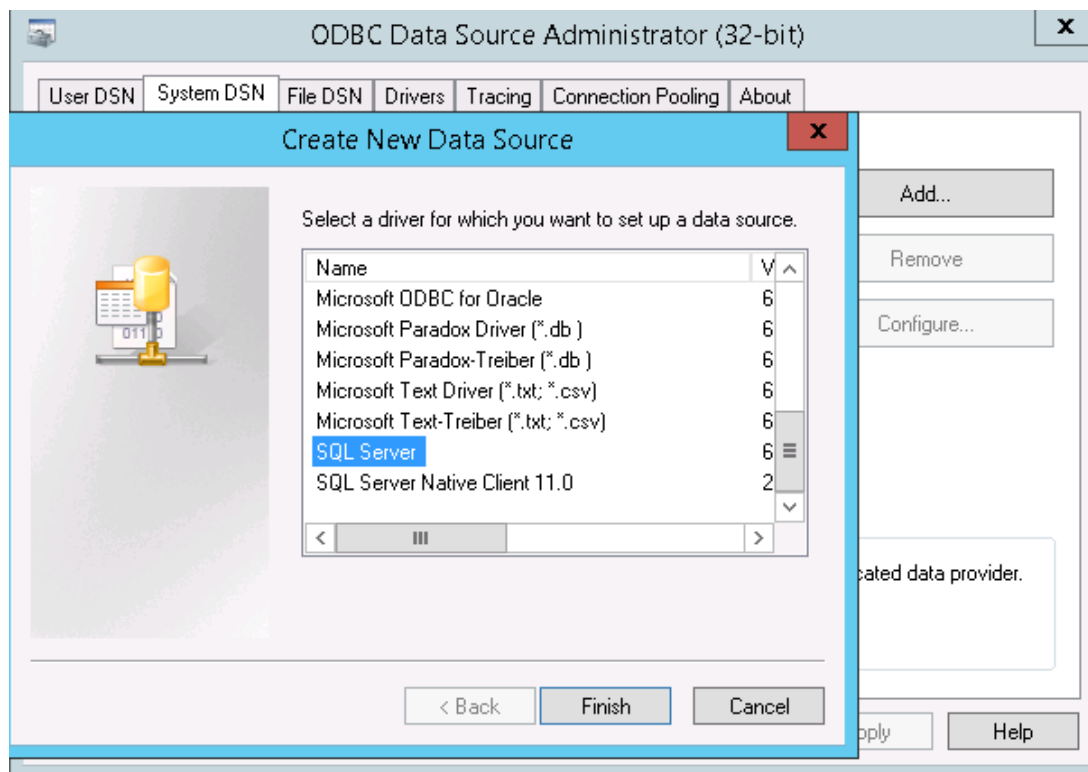
10. Do one of the following:

If your database is	Do this
SQL Server	Skip to step <b>11</b> of this procedure.
Oracle	Go to <a href="#">Appendix B: Workstation: Install Oracle 11 ODAC Client</a> on page <b>Error! Bookmark not defined..</b>

11. In the **CasePro Redaction Preferences** window, click **ODBC** to create a database source connection to the CasePro database.



12. Click the **System DSN** tab, and then click **Add**.
13. In the **Create New Data Source** box, click **SQL Server**, and then click **Finish**.



14. In the **Name** box, type in the desired name of the data source. This is the name by which the data source will be referred.
15. In the **Description** box, type whatever you like that helps clarify the purpose of the data source.

16. From the **Server** list, click the SQL server on which the database will reside, and then click **Next >**.

**Create a New Data Source to SQL Server**

This wizard will help you create an ODBC data source that you can use to connect to SQL Server.

What name do you want to use to refer to the data source?

Name:


How do you want to describe the data source?

Description:

Which SQL Server do you want to connect to?

Server:

17. Click the **With SQL Server Authentication using a login ID and password entered by the user** option.
18. Ensure the **Connect to SQL Server to obtain default settings for the additional configuration options** check box is selected.
19. For the **Login ID**, type **APCMUser**, and for the **Password**, type **Novisad123#**.



**Note**

This is a default login account for the CasePro database.

If you fail to connect to your CasePro database, contact your database administrator for appropriate user credentials.



**Create a New Data Source to SQL Server**

How should SQL Server verify the authenticity of the login ID?

☐ With Windows NT authentication using the network login ID.

☒ With SQL Server authentication using a login ID and password entered by the user.

To change the network library used to communicate with SQL Server, click Client Configuration.

Client Configuration...

☒ Connect to SQL Server to obtain default settings for the additional configuration options.

Login ID: APCMUser

Password: [masked]

< Back   Next >   Cancel   Help

20. Click **Next >**.

21. If necessary, click to select the **Change the default database to** check box, and select your CasePro Suite database from the list.

**Create a New Data Source to SQL Server**

☒ Change the default database to:

APCM\_Database

☐ Attach database filename:

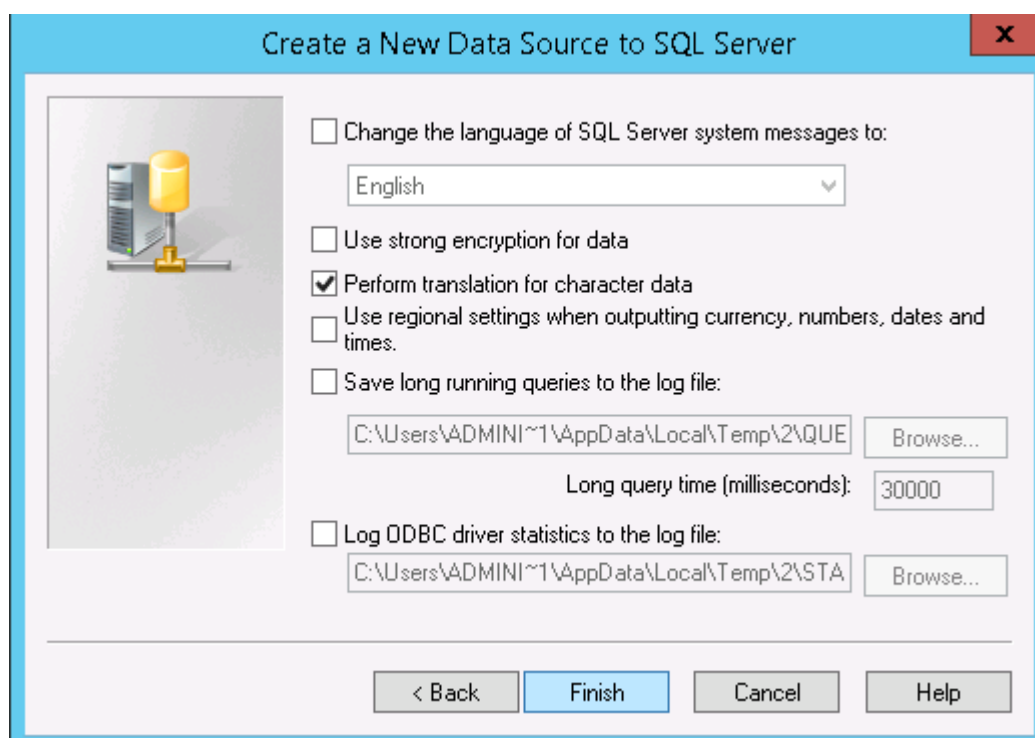
☒ Use ANSI quoted identifiers.

☒ Use ANSI nulls, paddings and warnings.

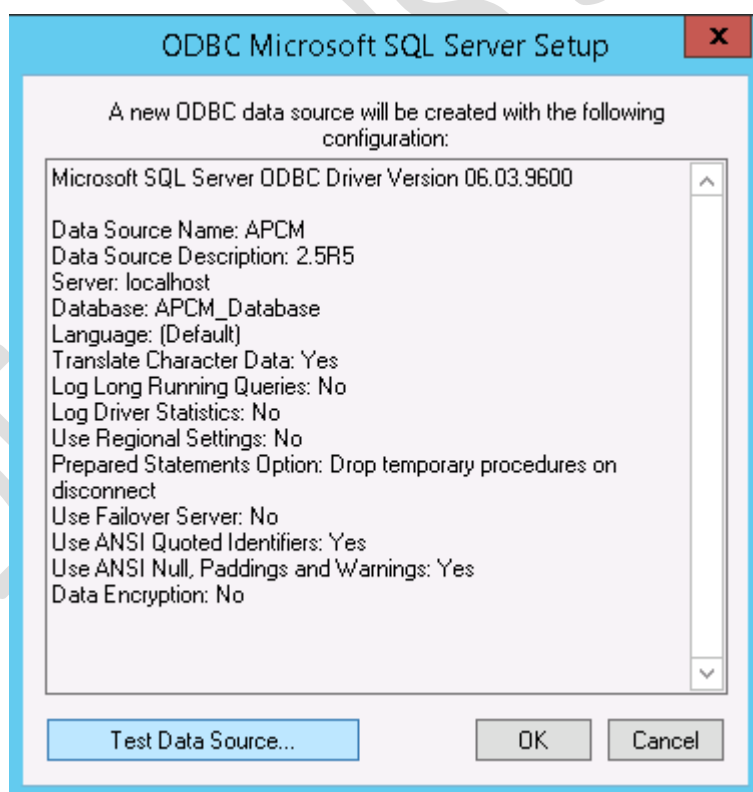
☐ Use the failover SQL Server if the primary SQL Server is not available.

< Back   Next >   Cancel   Help

22. Click **Next >**.

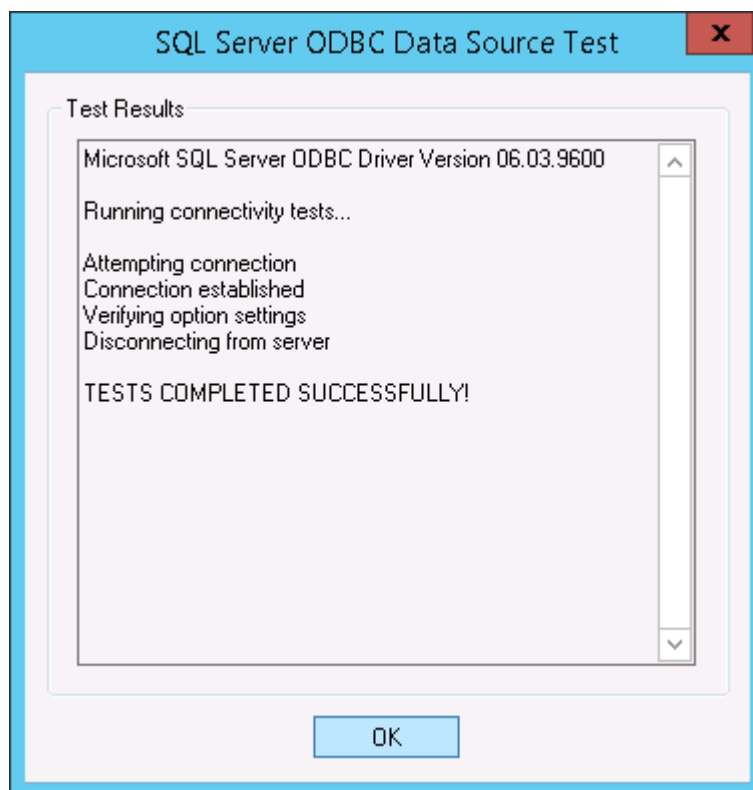


23. Keep the default settings, and click **Finish**.

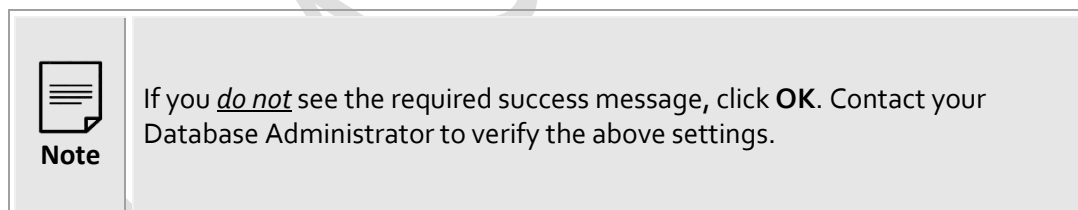


24. Click **Test Data Source...** to test your connection to the database.

In the results window, you see the **TESTS COMPLETED SUCCESSFULLY** message.



25. Click **OK**.



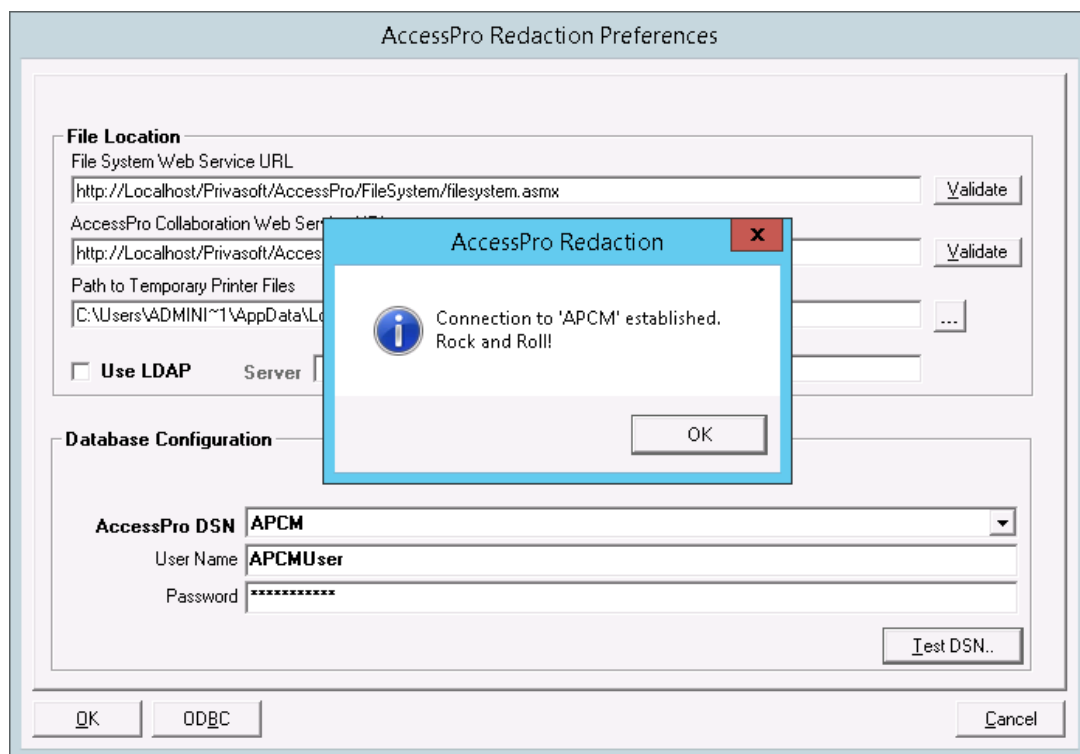
26. Click **OK** on the next two screens.

You have now created DSN connection to the CasePro Suite Database.

27. In the **CasePro Redaction Preferences** screen, in the **Database Configuration** group, choose your newly created CasePro data source from the **CasePro DSN** list.
28. In the **User Name** and **Password** boxes, type the same user name and password as you used when you created the data source connection.

By default, **User name:** APCMUser **Password:** Novisad123#

29. Click **Test DSN...**



30. Click **OK** to Rock and Roll!
31. Click **OK** to close the **CasePro Redaction Preferences** window and open the **CasePro Redaction Login** screen.

## APPENDIX C

# Revoking License Certificates

If you ever need to change your type of license certificates, you will need to revoke the licenses beforehand.

### To Revoke License Certificates

1. In CasePro, from the **Tools** menu, click **Administration**, and then click **Licensing**.
2. Under the **Revoke License Certificate** group, from the **Product** list, click the product for which you want to review licenses.

**Revoke License Certificate**

Product: AccessPro Redaction Standard ▼

	License	Total	Used	Expiry
Select	Demo	30	0	5/27/2015

3. Click **Select** adjacent to the license you want to revoke, and then click **Revoke** to remove unnecessary license.