

# Upgrade Checklist

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## 1.6.4 to 2.0.0 Upgrade Checklist

### Pre-Update Checklist

Read the release notes to familiarize yourself with the recent changes if not already done.

Make a list of all Servers/Systems (Manitou, Media Gateways, BoldNet, Stealth, Test/Sandbox Servers, Ticket Printers, etc.)

1. Verify the Servers and services are compatible with Manitou NEO
2. Have all windows updates been completed for all servers?
3. Check that replication is running.
4. Check if the customer has any custom work, verify components will not be impacted with update.
5. Take a screenshot of the currently running MSM for reference while starting the system back up.
6. Check there is enough available Hard Drive space for the current update packages and Database backup, see right for more details.
  - Check the Drive Manitou is located on, it will need enough space for the update files and the extracted files.
  - Check the C Drive/OS Drive, If there is little to no space available, the actions for updates may not complete correctly even if Manitou is on another drive.
7. Download the latest Update Files if not already done
8. Remove NTFS permission blocks on all downloaded files.
  - This must be done BEFORE EXTRACTING, otherwise all extracted child object inherit the blocked permission settings
  - Right click on the downloaded Install Package ZIP file and select properties.
  - At the bottom of the General tab, select the Unblock button, or uncheck the blocked checkbox and select Apply.
  - Select OK, and you can now unzip the package as normal.

9. Check if the customer is using a split configuration and make a note of the servers impacted.
10. Does the customer use multiple Application servers and/or have app server prioritization, make a note if there is any prioritization

## Prepare the Distribution Files

1. Make a backup of the Manitou folder
  - Navigate to the Manitou directory that contains the distributor folder
  - Create a new folder called Distributer Backup
  - Copy the current distributor folder's files to the newly created 'Distributer Backup' folder.
2. Make a database backup
3. Place the new updates in the current distributor folder
  - Verify again that NTFS permissions are no longer on the downloaded update files  
Extract the update files
  - Place the extracted update files, package, and distlist into the current distributor folder in the Manitou directory.
  - Place the latest ManitouNEO\_setup on the desktop of the machine running the ManitouNEO web interface.
4. Place the latest Manitou Utility and VCC setups on the desktop of all Manitou Servers.
5. Close the Distributer Commander and any other programs EXCEPT the MSM.
6. Make a note of the patch and packages on the customer system.
7. Let the customer know you are going to begin pushing the patches out.
  - Explain to the customer that no operators can logout at this time as the workstation will stop working if done.
  - If an operator logs out, they will not be able to login after this step.
8. Open the Distributer Commander and take a screenshot of the current Patch No and Packages.

9. Open the Log Viewer and check the distributor to catch any errors that may occur (Set to log level 4)
10. Clear package history and prepare for new release.
11. Send Packages to match what was previously in place
12. Send Patches to all machines EXCLUDING one backup Manitou server if a backup server is available and not part of the active configuration
  - This is for a failover point in the event of catastrophic failure during the upgrade.
13. Check the Logger for any errors
14. Open the Database manager and tear down replication (Run as Administrator)
  - If the DBM was already open, close it and reopen.
  - Let the customer know we are going to stop replication and to stop data entry
  - Once the customer has verified that data entry has been stopped, remove replication
15. If the patch is making a change to the DataCollector use the following steps (Release notes will give information for this step)
16. Bring the system down, apply database updates, and bring the system back up
  - Verify Replication is torn down
  - Let the customer know we are ready to bring the system down
  - Once the customer gives the OK, bring the system down
  - In the DBM, go to the Database Updates Tab
  - Select the Server that is/was Primary and apply updates (other machines will be updated later)
  - Once the updates are applied open the Health Check tab verify the database health (do not apply changes without a thorough review, THIS CAN DELETE DATA)
  - Start the Logger back up
  - Start all from the Broker
  - Verify that users can log back in and that the customer data looks good

- Start the FEP Once data has been confirmed by the customer as good
- If at any point the data does not look good or critical services will not start, assess if time is available to troubleshoot, if not, failover to the unupgraded server

## Update the Manitou NEO Web Files (This is not for BoldNet NEO)

1. Open IIS and verify the exact physical path of the manitou website application
  - This can be done by right clicking the application and selecting 'Explore'
2. Create a backup of the website files (The Entire folder not just manitou, api and oauth)
3. Run the latest ManitouNEO installer as administrator
  - Select ManitouNEO as the Installation Type
  - For the IIS Server entry, this should match what the SSL certificate issuance is.
  - The Sentry service should include all possible sentry entries. (Comma delimited)
  - Select Next, and complete the installer.
4. Verify the Web.config files in the API, MANITOU, and OAUTH folders within the website directory
5. Run the Manitou Utility Service setup.
6. Once verified, open ManitouNEO with chrome to test the login page
  - Check the version at the bottom right of the screen with the latest version available.
  - This should match the ManitouNEO\_setup.exe and Manitou.Models.DLL versions (after update 11)
  - After verifying these are correct, login. If an error is experienced, grab a level 3 technician or QA

## Update the Boldnet NEO Web Files

1. Open IIS and verify the exact physical path of the manitou website application
  - This can be done by right clicking the application and selecting 'Explore'

2. Create a backup of the website files (The Entire folder not just manitou, api and oauth)
3. Run the latest ManitouNEO installer as administrator
  - Select BoldNetNEO as the Installation Type
  - For the IIS Server entry, this should match what the SSL certificate issuance is.
  - The Sentry service is not needed, and can be left as default.
  - Select Next, and complete the installer.
4. Verify the Web.config files in the API, MANITOU, and OAUTH folders within the website directory
  - Check the Connection Strings, and the token and api URLs
5. Once verified, open BoldnetNEO with chrome to test the login page
  - Check the version at the bottom right of the screen with the latest version available.
  - After verifying these are correct, login. If an error is experienced, grab a level 3 technician or QA

## **Update BoldNet Silverlight and BoldNet Mobile**

- need to do the manually copy package 95 to boldnet machine, then run the upgrade and update.

## **Complete the Upgrade**

1. Push packages and patches to the emergency backup server
2. Run the database update on backup machines
3. Perform a health check on backup machines
4. Start Replication on the correct primary machines
5. Verify any additional or custom components are updated as necessary per the release notes