



Server Upgrade Guide

Version 6.1



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- The name of the software application
- The circumstances in which the problem arose
- What error messages you saw (if any);
- The version of the software that you were using.

Pitney Bowes Software Inc.

February 03, 2015

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Introduction

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About this document

This document describes how to upgrade your system from Portrait Dialogue 4.2.2 and upward.

Intended audience

This guide is intended for system and database administrators who need to upgrade their Portrait Dialogue system.

Related documentation

Document	Media (zip/dvd) and location
<ul style="list-style-type: none">Portrait Dialogue Server Installation Guide	<ul style="list-style-type: none">Portrait Dialogue media in: \Documentation\<i><language_code></i>\
<ul style="list-style-type: none">Portrait Dialogue Release Notes	<ul style="list-style-type: none">Portrait Dialogue media in: \Documentation\<i><language_code></i>\

Note: These documents and others can be downloaded from the Pitney Bowes Software website: <http://www.pbinsight.com/support/product-documentation/p/>

Overview

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Upgrade procedure

To upgrade Portrait Dialogue from one version to another, you should do the following steps (in this order):

1. Upgrade the system database, as described in the relevant section.
2. Run the RefreshSystemData tool.
3. Reinstall these applications:
 - a. Dialogue Server
 - b. Web Portal
 - c. Visual Dialogue.

In each case, the old version will automatically be uninstalled when you install the new version.

4. Carry out the other tasks that are described in [Mandatory Tasks](#) on page 69.

Upgrading to version 4.2.3

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Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\4.2` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes in 4.2.3 came in version 4.2.3.12.

Upgrading from version 4.2.2 to 4.2.3.12 and above

- Make sure your database has been upgraded to the latest 4.2.2 database version (4.2.2.13).
- Run the script `v4_2_3chg_oracle.sql`.
- Run the script `v4_2_3_1_to_4_2_3_2chg_oracle.sql`.
- Run the script `v4_2_3_2_to_4_2_3_3chg_oracle.sql`.
- Run the script `v4_2_3_3_to_4_2_3_4chg_oracle.sql`.
- Run the script `v4_2_3_4_to_4_2_3_6chg_oracle.sql`.
- Run the script `v4_2_3_6_to_4_2_3_12chg_oracle.sql`.

Upgrading from version 4.2.3.1 to 4.2.3.12 and above

- Run the script `v4_2_3_1_to_4_2_3_2chg_oracle.sql`.
- Run the script `v4_2_3_2_to_4_2_3_3chg_oracle.sql`.
- Run the script `v4_2_3_3_to_4_2_3_4chg_oracle.sql`.
- Run the script `v4_2_3_4_to_4_2_3_6chg_oracle.sql`.
- Run the script `v4_2_3_6_to_4_2_3_12chg_oracle.sql`.

Upgrading from version 4.2.3.2 to 4.2.3.12 and above

- Run the script `v4_2_3_2_to_4_2_3_3chg_oracle.sql`.
- Run the script `v4_2_3_3_to_4_2_3_4chg_oracle.sql`.
- Run the script `v4_2_3_4_to_4_2_3_6chg_oracle.sql`.
- Run the script `v4_2_3_6_to_4_2_3_12chg_oracle.sql`.

Upgrading from version 4.2.3.3 to 4.2.3.12 and above

- Run the script `v4_2_3_3_to_4_2_3_4chg_oracle.sql`.
- Run the script `v4_2_3_4_to_4_2_3_6chg_oracle.sql`.
- Run the script `v4_2_3_6_to_4_2_3_12chg_oracle.sql`.

Upgrading from versions 4.2.3.4 and 4.2.3.5 to 4.2.3.12 and above

- Run the script `v4_2_3_4_to_4_2_3_6chg_oracle.sql`.
- Run the script `v4_2_3_6_to_4_2_3_12chg_oracle.sql`.

Upgrading from versions between 4.2.3.6 and 4.2.3.11 to 4.2.3.12 and above

- Run the script `v4_2_3_6_to_4_2_3_12chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 4.2.3 came in version 4.2.3.12.

Upgrading from version 4.2.2 to 4.2.3.12 and above

- Make sure your database has been upgraded to the latest 4.2.2 database version (4.2.2.13).
- Run the script `v4_2_3chg_sqlserver.sql`.
- Run the script `v4_2_3_6_to_4_2_3_12chg_sqlserver.sql`.

Upgrading from versions between 4.2.3.6 and 4.2.3.11 to 4.2.3.12 and above

Run the script `v4_2_3_6_to_4_2_3_12chg_sqlserver.sql`.

Upgrading to version 4.3.0

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Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\4.3` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes in 4.3.0 came in version 4.3.0.12

Upgrading from version 4.2.3 to 4.3.0.12 and above

- Make sure your database has been upgraded to the latest 4.2.3 database version (4.2.3.12).
- Run the script `v4_3_0_12chg_oracle.sql`.

Upgrading from version between 4.3.0.1 and 4.3.0.3 to 4.3.0.12 and above

- Run the script `v4_3_0_1_to_v4_3_0_3chg_oracle.sql`.
- Run the script `v4_3_0_3_to_4_3_0_12chg_oracle.sql`.

Upgrading from version between 4.3.0.3 and 4.3.0.11 to 4.3.0.12 and above

- Run the script `v4_3_0_3_to_4_3_0_12chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 4.3.0 came in version 4.3.0.12

Upgrading from version 4.2.3 to 4.3.0.12 and above

- Make sure your database has been upgraded to the latest 4.2.3 database version (4.2.3.12).
- Run the script `v4_3_0_12chg_sqlserver.sql`.

Upgrading from versions between 4.3.0.5 and 4.3.0.11 to 4.3.0.12 and above

- Run the script `v4_3_0_5_to_4_3_0_12chg_sqlserver.sql`.

Migrating questionnaires and answers

The questionnaire module in Portrait Dialogue was completely rewritten between version 4.2.3 and version 4.3.0. To migrate your questionnaires and the answer forms belonging to them you need to execute a java script. The script is named `migrate_quest.js` and is located in the `SQL` folder on the installation CD. Carefully read the instructions at the top of the script file and make any changes necessary before you execute it. Also make sure your database has been upgraded to the latest version (4.3.0.12).

After the java script has been executed and you are sure all data has been successfully migrated you can remove the old questionnaire structure from your database. If you are using Oracle, running the SQL script `remove_old_quest_oracle.sql` does this. If you are using SQL Server, run the script `remove_old_quest_sqlserver.sql`.

Upgrading to version 4.3.1

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Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\4.3` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes in 4.3.1 came in version 4.3.1.22

Upgrading from version 4.3.0 to 4.3.1.22 and above

- Make sure your database has been upgraded to the latest 4.3.0 database version (4.3.0.12).
- Run the script `v4_3_1_22chg_oracle.sql`.

Upgrading from versions between 4.3.1.1 and 4.3.1.9 to 4.3.1.22 and above

- Run the script `v4_3_1_9_to_4_3_1_10chg_oracle.sql`.
- Run the script `v4_3_1_10_to_4_3_1_22chg_oracle.sql`.

Upgrading from versions between 4.3.1.10 and 4.3.1.21 to 4.3.1.22 and above

- Run the script `v4_3_1_10_to_4_3_1_22chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 4.3.1 came in version 4.3.1.22

Upgrading from version 4.3.0 to 4.3.1.22 and above

- Make sure your database has been upgraded to the latest 4.3.0 database version (4.3.0.12).
- Run the script `v4_3_1_22chg_sqlserver.sql`.

Upgrading from versions between 4.3.1.1 and 4.3.1.9 to 4.3.1.22 and above

- Run the script `v4_3_1_9_to_4_3_1_10chg_sqlserver.sql`.
- Run the script `v4_3_1_10_to_4_3_1_22chg_sqlserver.sql`.

Upgrading from versions between 4.3.1.10 and 4.3.1.21 to 4.3.1.22 and above

- Run the script `v4_3_1_10_to_4_3_1_22chg_sqlserver.sql`.

Updating parameters in Dialogue Admin

Three parameters in Dialogue Admin have been changed. You have to change these manually.

- Customer web access/UnsubscribeURL: `Unsubscribe.aspx` must be changed to `Default.aspx`.
- Customer web access/WebProfileURL: `Profile.aspx` must be changed to `Default.aspx`.
- Reports/ReportPortalURL: `MHReportPortal` must be changed to `MHReportal`.

Also, there is a new parameter `Reports/ReportViewerURL` that must be set for Visual Dialogue to access the Report Viewer web application correctly.

See the help file provided with Dialogue Admin for more help on how to change parameters.

Updating system permission types

Some of the system permission types (in the `SYSTEM_PERMISSION_TYPE` table) have been renamed in this version. **After** you have run the `RefreshSystemData` program to refresh system data, execute the script `update_system_permissions_431.sql` located in the `SQL` folder on the installation CD to update your user and group permissions with the new values.

Upgrading reports

The data model for reports in Portrait Dialogue has not changed dramatically, but you might experience some problems with report parameters. This is because the report parameter table is now a child table of the report template instead of report datasource. The last part of the upgrade script tries to move the old report parameters but might fail if a report contains parameters with identical names.

You should check that all report parameters look all right after the upgrade script has been run. When you are satisfied you should delete the table `REPORT_DATASOURCE_PARAM` as this table is no longer in use.

Upgrading Web links to the CWA application

Due to changes in the Customer Web Access application (CWA) in version 4.3.1, web links (URLs) generated with earlier versions need to be regenerated.

These links are:

- Links to questionnaires (all questionnaire URL types)

- Links to Customer Web Profile

Upgrading to version 4.4

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Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\4.4` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes in 4.4 came in version 4.4.3

Upgrading from version 4.3.1 to 4.4.3 and above

- Make sure your database has been upgraded to the latest 4.3.1 database version (4.3.1.22).
- Run the script `v4_4_3chg_oracle.sql`.

Upgrading from version 4.4.1 to 4.4.3 and above

- Run the script `v4_4_1_to_4_4_2chg_oracle.sql`.
- Run the script `v4_4_2_to_4_4_3chg_oracle.sql`.

Upgrading from version 4.4.2 to 4.4.3 and above

- Run the script `v4_4_2_to_4_4_3chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 4.4 came in version 4.4.3

Upgrading from version 4.3.1 to 4.4.3 and above

- Make sure your database has been upgraded to the latest 4.3.1 database version (4.3.1.22).
- Run the script `v4_4_3chg_sqlserver.sql`.

Upgrading from version 4.4.0 or 4.4.1 to 4.4.3 and above

- Run the script `v4_4_0_to_4_4_2chg_sqlserver.sql`.
- Run the script `v4_4_2_to_4_4_3chg_sqlserver.sql`.

Upgrading from version 4.4.2 to 4.4.3 and above

- Run the script `v4_4_2_to_4_4_3chg_sqlserver.sql`.

Possible problems with the `IDX_QA_UNIQUE` unique index

When you update from version 4.3.1 you might get an error when the upgrade script tries to create the `IDX_QA_UNIQUE` index. This index is created to ensure uniqueness of answers and alternatives in an answer form, and in some installations (typically where answer forms have been imported using scripts) the creation of the index fails because this rule has been violated. To help you fix this, a file called `delete_duplicate_answers_44.sql` is located in the `SQL` folder on the installation CD. The file contains three SQL statements, one to check for and show you duplicates and two to delete all duplicates except the last inserted answer. After you have cleaned up your database using these statements, you can copy the create index statement from the upgrade script and execute it to finish the database upgrade.

Updating parameters in Dialogue Admin

There are two new parameters in Dialogue Admin that must be set for the system to work correctly. These are

- Customer web access/EmailMessageURL: The base URL to view email messages using the Customer Web Access application (usually `http://<webserver>/mhcwa/msg`).
- Customer web access/WebUtilsURL: Base URL to the Web Utils application (usually `http://<webserver>/mhwu`).

See the help file provided with Dialogue Admin for more help on how to change parameters.

Updating system permission types

There is a new system permission type, *Allow user to override system parameters*. **After** you have run the `RefreshSystemData` program to refresh system data, you can execute the script `update_system_permissions_44.sql` located in the `SQL` folder on the installation CD to grant the new permission to the administrator group.

If you want to grant the permission to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

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Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\4.5` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes in 4.5 came in version 4.5.6

Upgrading from version 4.4 to 4.5.6 and above

- Make sure your database has been upgraded to the latest 4.4 database version (4.4.3).
- Run the script `v4_5_6chg_oracle.sql`.

Upgrading from version 4.5.1 to 4.5.6 and above

- Run the script `v4_5_1_to_4_5_2chg_oracle.sql`.
- Run the script `v4_5_2_to_4_5_4chg_oracle.sql`.
- Run the script `v4_5_4_to_4_5_6chg_oracle.sql`.

Upgrading from version 4.5.2 or 4.5.3 to 4.5.6 and above

- Run the script `v4_5_2_to_4_5_4chg_oracle.sql`.
- Run the script `v4_5_4_to_4_5_6chg_oracle.sql`.

Upgrading from version 4.5.4 or 4.5.5 to 4.5.6 and above

- Run the script `v4_5_4_to_4_5_6chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 4.5 came in version 4.5.6

Upgrading from version 4.4 to 4.5.6 and above

- Make sure your database has been upgraded to the latest 4.4 database version (4.4.3).
- Run the script `v4_5_6chg_sqlserver.sql`.

Upgrading from version 4.5.0 or 4.5.1 to 4.5.6 and above

- Run the script `v4_5_0_to_4_5_2chg_sqlserver.sql`.
- Run the script `v4_5_2_to_4_5_4chg_sqlserver.sql`.
- Run the script `v4_5_4_to_4_5_6chg_sqlserver.sql`.

Upgrading from version 4.5.2 or 4.5.3 to 4.5.6 and above

- Run the script `v4_5_2_to_4_5_4chg_sqlserver.sql`.
- Run the script `v4_5_4_to_4_5_6chg_sqlserver.sql`.

Upgrading from version 4.5.4 or 4.5.5 to 4.5.6 and above

- Run the script `v4_5_4_to_4_5_6chg_sqlserver.sql`.

Miscellaneous upgrade tasks (from v4.4)

Possible Problems**Possible problems with the `IDX_QQ_NAME` unique index**

When you update from version 4.4 you might get an error when the upgrade script tries to create the `IDX_QQ_NAME` index. This index is created to ensure uniqueness of questionnaire names, and in some installations the creation of the index fails because this rule has not been enforced before. To fix this, simply rename the offending questionnaires so that every questionnaire has a unique name. You can then copy the create index statement from the upgrade script and execute it to finish the database upgrade.

Possible problems with the `IDX_RT_NAME` unique index

When you update from version 4.4 you might get an error when the upgrade script tries to create the `IDX_RT_NAME` index. This index is created to ensure uniqueness of report template names, and in some installations the creation of the index fails because this rule has not been enforced before. To fix this, simply rename the offending report templates so that every template has a unique name. You can then copy the create index statement from the upgrade script and execute it to finish the database upgrade.

Updating parameters in Dialogue Admin

There is one new parameter in Dialogue Admin that must be set for the system to work correctly. It is

- `Dashboard/DashboardURL`: The URL to the Dashboard Web application (usually `http://<webserver>/MHDashboard`).

See the help file provided with Dialogue Admin for more help on how to change parameters.

Updating system permission types

There are three new system permission types, *Allow user to log on to Dashboard*, *Allow user to change the Dashboards default settings* and *Allow user to change his own Dashboard settings*. **After** you have run the RefreshSystemData program to refresh system data, you can execute the script `update_system_permissions_45.sql` located in the `SQL` folder on the installation CD to grant the new permissions to the administrator group.

If you want to grant the permissions to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Upgrading web applications

Version 4.5 web applications uses the Microsoft .NET 2.0 framework, meaning you have to install this on your web server if it is not already installed. The framework can be downloaded from Microsoft's website.

Note that the 1.1 framework can coexist with the 2.0 framework if you have other web applications that uses the older framework. There are however some things you need to take into consideration. If you use IIS 6 and you need to have applications that use different versions of the framework, you need to run them in different application pools. IIS 5 normally handles this on its own.

Miscellaneous tasks when upgrading from v4.4, v4.5.0 and v4.5.1

License file

After you have installed the server, you have to put a Portrait Dialogue license file into the folder where the server was installed to use the system. This file is provided by Portrait Software or one of its distributors. You will have to restart the COM+ application after the file has been installed.

Updating system permission types

There are two new system permission types, *Allow user to logon to MS Outlook plugin* and *Allow user to design content objects* in version 4.5.2. **After** you have run the RefreshSystemData program to refresh system data, you can execute the script `update_system_permissions_452.sql` located in the `SQL` folder on the installation CD to grant the new permissions to the administrator group.

If you want to grant the permissions to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Upgrading web applications

If you install the Dashboard web application you have to have Microsoft ASP.NET Ajax 1.0 installed on your web server.

Upgrading receive mail service configuration

Version 4.5.2 introduces a new way of configuring the receive mail service. You now have the ability to have several configurations, for instance to pop more than one mail account. As a result of this, many of the configuration parameters has been moved from the regular Dialogue Admin parameters to a new Bounce configuration window in Dialogue Admin (located under *Dialog Setup*). Most of the parameters will be moved automatically in the database upgrade script, but you have to manually move the **CustomerDomainEmailFields** parameter and enable the configuration after you have verified it is OK.

After you have done this, you can execute the script `delete_unused_params_45.sql` located in the `SQL` folder on the installation CD to delete the old unused parameters.

Miscellaneous tasks when upgrading from v4.4 and between and including v4.5.0 and v4.5.3

Updating system permission types

There are two new system permission types, *Allow user to export objects in Visual Dialogue* and *Allow user to import objects in Visual Dialogue* in version 4.5.4. **After** you have run the `RefreshSystemData` program to refresh system data, you can execute the script `update_system_permissions_454.sql` located in the `SQL` folder on the installation CD to grant the new permissions to the administrator group and the dialog designer group.

If you want to grant the permissions to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Miscellaneous tasks when upgrading from v4.4 and between and including v4.5.0 and v4.5.4

The Dialogue Admin parameter group 'System Global' was split into three groups in version 4.5.4. Some parameters were moved to the new groups 'System data access' and 'System environment' while some stayed in the original 'System Global' group. This resulted however in some parameters appearing in both the old and the new group. To fix this, execute the script `update_params_45.sql` located in the `SQL` folder on the installation CD.

Upgrading to version 4.6

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Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\4.6` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes in 4.6 came in version 4.6.2

Upgrading from version 4.5 to 4.6.2 and above

- Make sure your database has been upgraded to the latest 4.5 database version (4.5.6).
- Run the script `v4_6_2chg_oracle.sql`.

Upgrading from version 4.6.0 to 4.6.2 and above

- Run the script `v4_6_0_to_4_6_1chg_oracle.sql`.
- Run the script `v4_6_1_to_4_6_2chg_oracle.sql`.

Upgrading from version 4.6.1 to 4.6.2 and above

- Run the script `v4_6_1_to_4_6_2chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 4.6 came in version 4.6.2

Upgrading from version 4.5 to 4.6.2 and above

- Make sure your database has been upgraded to the latest 4.5 database version (4.5.6).
- Run the script `v4_6_2chg_sqlserver.sql`.

Upgrading from version 4.6.0 to 4.6.2 and above

- Run the script `v4_6_0_to_4_6_1chg_sqlserver.sql`.
- Run the script `v4_6_1_to_4_6_2chg_sqlserver.sql`.

Upgrading from version 4.6.1 to 4.6.2 and above

- Run the script `v4_6_1_to_4_6_2chg_sqlserver.sql`.

SQL Server 2005 upgrade script

In addition to running the upgrade scripts mentioned above, there is an upgrade script made especially for SQL Server 2005. This script is called `v4_6_2chg_sqlserver2005.sql` and must be run after the other scripts. The script contains changes to the database (especially indexes) and takes advantage of new functionality found in SQL Server 2005 to improve performance.

Miscellaneous tasks when upgrading from version 4.5

Upgrading in general

The installation programs have gone through a major rewrite and are now distributed as msi-packages. You should pay special attention to the default installation folders as they have changed. In general, it is recommended to uninstall all previously installed versions before upgrading to version 4.6.

New installation folders

Since the default Windows applications installation folder has changed from `\Program Files\Million Handshakes` to `\Program Files\PST\Million Handshakes` you have two options when installing:

1. Use the same folder as before. To do this you have to change the installation destination when you run the installation program.
2. Install using the new default folder. This is the recommended method as it will make it easier for you during upgrades in the future.

If you use method two, you will have to move some files after the Dialogue Server installation. Specifically, you have to move the files **instances.ini** and **mh.lic** from the old `Dialog Server` folder to the new one. After you have moved the files, you have to restart the **Million Handshakes** com+ package.

When you choose to use method 2, you also have to pay attention to the MH share. We recommend creating a new folder under the `PST` folder called `Million Handshakes Data` and move all your instance files from the old to the new folder by moving the `Instances` folder from the old `Million Handshakes` folder to the new folder you just created. After doing this you delete the file share on the old `Million Handshakes` folder and create a share new with the same name on the new `Million Handshakes Data` folder. This does of course not apply if you already have moved your `Instances` folder out of the installation folder structure,

The web applications installation folder has been changed from `\Program Files\Million Handshakes` to `\Program Files\PST\Million Handshakes Web`. We also recommend using the new installation folder here.

Removing MHDialogServerAPIWin web share

The new web applications are not dependant on a special Dialogue Serverapi web share to do windows authentication. You should therefore remove the `MHDialogServerAPIWin` web share as it is no longer in use. This should be done before you install the new web applications.

Upgrading web applications

Version 4.6 web applications use the Microsoft .NET 3.5 framework, meaning you have to install this on your web server if it is not already installed. The framework can be downloaded from Microsoft's website.

Note that the 3.5 framework builds on the 2.0 framework and is essentially an extension to 2.0.

Configuring web access to Dialogue Server api

The way the web applications are configured to connect to the Dialogue Serverapi web share has changed in version 4.6. If you need to configure this manually, the way to do this is described in the **Installation of Portrait Campaign Manager 4.6** document.

Updating parameters in Dialogue Admin

There is one new parameter in Dialogue Admin that must be set for the system to work correctly. This are

- Customer Internal URLs/WebPortalURL: The URL to the Web Portal application which hosts different standard and custom made web modules (usually `http://<webserver>/MHWebPortal`).

In addition, there is a new parameter *System data access/OptimizeForSQLServer2005*. Setting this parameter to true will let the Dialogue Server use sql functionality which was introduced in SQL Server 2005. You should set the parameter value to **true** if you are running your database on SQL Server 2005 or newer. Set it to **false** otherwise.

See the help file provided with Dialogue Admin for more help on how to change parameters.

Updating Dialogue Admin parameter locations

The different URL parameters in Dialogue Admin have been grouped into two groups in 4.6.0, Internal URLs and Public URLs. To move parameter values to the new groups and delete old unused groups, execute the script `update_params_46.sql` located in the `SQL` folder on the installation CD **after** you have run the `RefreshSystemData` program to refresh system data.

Updating system permission types

There are several new system permission types;

- *Allow user to delete email and link tracking data*
- *Allow user to delete response data in Visual Dialogue*
- *Allow user to design master templates*
- *Allow user to access Message Designer*
- *Allow user to edit Message Designer templates*
- *Allow user to delete Message Designer templates*
- *Allow user to test send messages and Allow user to spam rate templates*

After you have run the `RefreshSystemData` program to refresh system data, you can execute the script `update_system_permissions_46.sql` located in the `SQL` folder on the installation CD to grant the new permissions to the administrator group. In addition, this script will create a new group named *Message Designer users* and grant all the Message Designer permissions to this group.

If you want to grant the permissions to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Miscellaneous tasks when upgrading from version 4.6.1

Updating Dialogue Admin parameter locations

The parameter *StorageOptionTempTablesThreshold* in Dialogue Admin has been renamed to *UseTempTablesForMessagesThreshold* and moved from the parameter group *Channel parameters to System data access*. To move and rename the parameter, execute the script `update_params_462.sql` located in the `SQL` folder on the Million Handshakes CD **after** you have run the `RefreshSystemData` program to refresh system data.

Using temporary tables

NB! The use of a temporary database is only applicable for installations running on Microsoft SQL Server.

In version 4.6.2, the Dialogue Server had been enhanced to increase performance by using temporary tables. To get the most benefit from this new functionality, it is recommended to create a separate database (called MH temporary database hereafter). To create and configure the use of a temporary database, follow the following steps:

1. Create a new database to be used as MH temporary database. Use the same name as the MH database with a suffix of “_temp” (i.e. MHPProd_temp).
2. The user used in the connection string to the MH instance should be set at the owner of the MH temporary database.
3. Set the recovery model of the MH temporary database to “Simple”.
4. Start the Dialogue Admin application and set the following parameters located under “System Data Access”:
 - TempDatabase = The name of the database you created in step 1.
 - TempTablePrefix = This can be left blank under most circumstances. It is only necessary to set if your MH instance name contains special characters (like “-“) which does not comply with the rules for the format of identifiers, or if the name of your instance is very long.
 - TempTablesExpiry=2
 - UseTempTablesForMessages=True
 - UseTempTableForMessagesThreshold = 1000
 - UseTempTableForDialogs = True
 - UseTempTableForDialogsThreshold = 0

4.6.2 Hotfix

If you are upgrading from version 4.6.1 to 4.6.2, you don't have to upgrade all the software in the system if you don't want to. Refer to the document `Hotfix_Instructions.htm` in the `Hotfix` folder on the installation CD to find out what you must do to upgrade your installation. Remember that the database upgrades described in this document is mandatory.

Upgrading to version 5.0

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- Updating system permission types41
- Updating customer id data type41
- Unicode support in reports42
- Updating email channel parameters42

Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\5.0` folder on the installation media (DVD/ZIP file).

Updating the License file

After upgrading to version 5.0 you will need to obtain a new license file. This is because the license file format has been changed. This file is provided by Portrait Software or one of its distributors.

You will need to put (or replace) the Portrait Dialogue license file in the folder where the server is installed (the `DialogServer` folder). You will have to restart the COM+ application after the file has been installed.

Upgrading an Oracle RDBMS database

The last database changes in 5.0 came in version 5.0.2

Note that your Oracle database server and client software must be patched to the latest Oracle release. At the time of writing, this means Oracle 10g version 10.2.0.4 or later.

Upgrading from version 4.6 to 5.0.2 and above

- Make sure your database has been upgraded to the latest 4.6 database version (4.6.2).
- Run the script `v5_0_2chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 5.0 came in version 5.0.2

Upgrading from version 4.6 to 5.0.2 and above

- Make sure your database has been upgraded to the latest 4.6 database version (4.6.2).
- Run the script `v5_0_2chg_sqlserver.sql`.

Upgrading from version 5.0.1 to 5.0.2 and above

- Run the script `v5_0_1_to_5_0_2chg_sqlserver.sql`.

Updating parameters in Dialogue Admin

There are two new parameters in Dialogue Admin that must be set for the system to work correctly. These are:

- PSS integration/PssServicesBaseUrl: The URL to the Portrait Shared Services application which amongst others give access to Portrait Customer Analytics (usually `http://<server>/Portrait-SharedServices`).
- PSS integration/PssHqUrl: The URL to the Portrait Headquarter application. Portrait Headquarters provides you with a set of complementary views of the overall marketing situation. It provides a single starting point for planning, designing, executing and monitoring campaigns.

See the help file provided with Dialogue Admin for more help on how to change parameters.

Updating system permission types

There are several new system permission types;

- *Allow user to design dialog templates*

In addition, there are a several new permission types used by the new Portrait Headquarter application. All these permission types are located under *Portrait CMS*.

After you have run the RefreshSystemData program to refresh system data, you can execute the script `update_system_permissions_50.sql` located in the SQL folder on the installation CD to grant the new *Allow user to design dialog templates* permission to the System administrators and Dialog designers groups. This script will also grant the new Portrait Headquarter permissions to the System administrators and Portrait Headquarter user groups.

If you want to grant the permissions to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Updating customer id data type

There are two new tables in the database which contains customer id fields. If you changed the data type of customer id fields to something other than the default (*string (varchar(40))*) during the initial installation of the database you need to execute a script. The script is named:

For SQL Server: `update_customer_id_data_type_50_sqlserver.sql`

For Oracle: `update_customer_id_data_type_50_oracle.sql`

Before you execute the script, you must edit it and substitute `<cust_id_datatype>` with the actual data type you chose during the initial database installation. This can be found in the SI_CUS-

TOMER_ID_DATATYPE field in the SYSTEM_INFO table. If the SI_CUSTOMER_ID_DATATYPE field is empty, it means you did not change the data type during installation and need not execute the script.

Unicode support in reports

If you are going to use Unicode characters in your system, you need to install a Unicode font to get full support for Unicode in the Portrait Dialogue Reports pdf format. This font must be installed on the dialogue server and on all clients where Visual Dialogue is going to be used to design reports. We recommend using the *Arial Unicode MS* font. This font is used by the standard reports installed with Portrait Dialogue. It is distributed with Microsoft Office and you can find out more about this font at <http://www.microsoft.com/typography/Fonts/font.aspx?FMID=1081> and <http://office.microsoft.com/en-us/help/HP052558401033.aspx>.

Updating email channel parameters

If you are going to use Unicode format (utf-8) for HTML email templates, which is the default in PD 5.0, you will most likely need to manually update a channel parameter:

In Dialog Admin under **Channel types -> Email -> Output channels**, select **Email** and open **Properties**. Under **Channel Parameters** set **Default CharSet** to **utf-8**.

Note that if this parameter value is left blank or set to **iso-8859-1**, you may experience problems with national characters (e.g. Norwegian characters 'æ', 'ø' and 'å') in some email readers (including Microsoft Office Outlook).

Upgrading to version 5.1

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- Miscellaneous tasks when upgrading from v5.1.2 and below45

Introduction

All upgrade scripts are located in the `SQL\UpgradeScripts\5.1` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes in 5.1 came in version 5.1.3.

Note that your Oracle database server and client software must be patched to the latest Oracle release. At the time of writing, this means Oracle 10g version 10.2.0.4 or later.

Upgrading from version 5.0 to 5.1.3 and above

- Make sure your database has been upgraded to the latest 5.0 database version (5.0.2).
- Run the script `v5_1_3chg_oracle.sql`.

Note: The script changes data type on all primary key columns. This means that running the script will take a long time and might need extra space in the database to complete.

Upgrading from version 5.1.1 to 5.1.2 to 5.1.3 and above

- Run the script `v5_1_1_to_5_1_3chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes in 5.1 came in version 5.1.3

Upgrading from version 5.0 to 5.1.3 and above

- Make sure your database has been upgraded to the latest 5.0 database version (5.0.2).
- Run the script `v5_1_3chg_sqlserver.sql`.
- **Note:** The script changes data type on all primary key columns. This means that running the script will take a long time and might need extra space in the database to complete.

Upgrading from version 5.1.1 to 5.1.2 to 5.1.3 and above

- Run the script `v5_1_1_to_5_1_3chg_sqlserver.sql`.

Miscellaneous tasks when upgrading from v5.0 and below

Updating customer domain system groups

A new field, “Completed”, has been added to the system group “AnswerForms” in customer domains definition. If you are using the “AnswerForms” group in your customer domains, you need to use the *Refresh field list* command in the customer domain editor for this group in each customer domain where it is used. See the help file provided with Dialogue Admin for more help on the *Refresh field list* command.

Miscellaneous tasks when upgrading from v5.1.1 and below

Updating system permission types

There is a new system permission type, Allow user to export customer data in Dialogue, in version 5.1.2. After you have run the `RefreshSystemData` program to refresh system data, you can execute the script `update_system_permissions_5_1_2.sql` located in the `SQL` folder on the installation CD to grant the new permission to the administrator group and the dialog designer group. If you want to grant the permission to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Miscellaneous tasks when upgrading from v5.1.2 and below

Updating system permission types

There is a new system permission type for HQ, **Allow user to edit global selections**, in version 5.1.3. **After** you have run the **RefreshSystemData** program to refresh system data, you can execute the script `update_system_permissions_5_1_3.sql` located in the `SQL` folder on the installation CD to grant the new permission to the administrator group, the Portrait HQ marketing operations users group and the Portrait HQ direct marketer users group. In addition, this script will grant the permissions *Allow user to add and edit campaigns* and *Allow user to delete HQ content* to the Portrait HQ marketing operations users group.

If you want to grant the new permission to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Upgrading to version 5.2

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Introduction

All upgrade scripts are located in the `SQL\Upgrade Scripts\5.2` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes came in version 5.2 (5.2.0).

Note that your Oracle database server and client software must be patched to the latest Oracle release. At the time of writing, this means Oracle 10g version 10.2.0.4 or later.

Upgrading from version 5.1 to 5.2.0 and above

- Make sure your database has been upgraded to the latest 5.1 database version (5.1.3).
- Run the script `v5_2_0chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes came in version 5.2 (5.2.0).

Upgrading from version 5.1 to 5.2.0 and above

- Make sure your database has been upgraded to the latest 5.1 database version (5.1.3).
- Run the script `v5_2_0chg_sqlserver.sql`.

On-site customization of web applications

Any on-site customization done to web applications (changes in `web.config` files etc.) will be overwritten when upgrading the web applications. Therefore these files should be backed up before starting the web installation.

Addition/changes to questionnaire CSS classes

The following CSS classes have been updated to disable IME input mode for numeric input:

- `mh_calendar_textbox`
- `mh_timepicker_textbox`
- `mh_valuation_alt_textbox`

The new CSS class `mh_question_numeric_textbox` has been added. Addition of this class means that the existing class `mh_question_textbox` only applies to questions of type “string”. For numeric questions, `mh_question_numeric_textbox` now applies instead.

Impact for existing Portrait Dialogue users

If users have overridden the `mh_question_textbox` class in any of their existing questionnaire layouts, they should also override the new `mh_question_numeric_textbox` class, since `mh_question_textbox` no longer applies to numeric questions.

Dashboard

Support for the Dashboard web application is deprecated from version 5.2 onwards. Dashboard will not be installed by default during a “Complete” installation. You will need to perform a “Custom” installation and select this component for it to be installed.

Dashboard links from the navigation pane and **View** menu in Visual Dialogue are disabled by default. To enable them, you will need to set the Internal URLs/DashboardEnabled parameter to “TRUE”.

Support for altering the system data language of an existing instance

To alter the system data language of an existing instance:

- Upgrade your database and system data to 5.2 (US English).
- Rerun `RefreshSystemData.exe` with the `-L` switch to alter the system data language (example: `-L="fr-FR"`).

The following are not translated when you upgrade an existing instance and change the system data language:

- Folder names in Visual Dialogue (table: FOLDER)
- Report template names of standard reports, which are provided in US English only (table: REPORT_TEMPLATE)

Support for altering the system data language of an existing instance

- Report template folder names (table: REPORT_TEMPLATE_FOLDER)
- User group names and descriptions in Dialogue Admin (table: SYSTEM_USER_GROUP)
- User names, display names, and descriptions in Dialogue Admin (table: SYSTEM_USER_INFO)
- Names and descriptions of non-system SQL Types (in SQL repository) in Dialogue Admin (table: SQL_DEFINITION_TYPE). These SQL types (or groups) are only provided as examples when installing a new database.

Most of these strings can be changed manually if desired.

Upgrading to version 6.0

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Introduction

All upgrade scripts are located in the `SQL\Upgrade Scripts\6.0` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes came in version 6.0 SP1 (6.0.1).

Note that your Oracle database server and client software must be patched to the latest Oracle release. At the time of writing, this means Oracle 10g version 10.2.0.4 or later.

Upgrading from version 5.2 to 6.0.1 and above

- Make sure your database has been upgraded to the latest 5.2 database version (5.2.0).
- Run the script `v6_0_1chg_oracle.sql`.

Upgrading from version 6.0.0 to 6.0.1 and above

- Run the script `v6_0_0_to_6_0_1chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes came in version 6.0 SP1 (6.0.1).

SQL Server Native Client support

Portrait Dialogue version 6 only supports SQL Server Native Client 11. This must be installed on the Dialogue Server, and can be downloaded from the SQL Server 2012 Feature Pack web page. See the Portrait Dialogue Reference Guide for details on how to configure the database connection string.

Upgrading from version 5.2 to 6.0.1 and above

- Make sure your database has been upgraded to the latest 5.2 database version (5.2.0).
- Run the script `v6_0_1chg_sqlserver.sql`.

Upgrading from version 6.0.0 to 6.0.1 and above

- Run the script `v6_0_0_to_6_0_1chg_sqlserver.sql`.

On-site customization of web applications

Any on-site customization done to web applications (changes in `web.config` files etc.) will be overwritten when upgrading the web applications. Therefore these files should be backed up before starting the web installation.

Updating system permission types

There are several new system permission types for HQ in version 6.0.0. **After** you have run the **Refresh-SystemData** program to refresh system data, you can execute the script `update_system_permissions_60.sql` located in the SQL folder on the installation CD to grant the new permissions to the administrator group and various Portrait HQ users groups.

If you want to grant the new permission to other groups or users, you have to do this manually. See the help file provided with Dialogue Admin for more help on how to administer system permissions.

Updating customer id data type

There are two new tables in the database which contains customer id fields. If you changed the data type of customer id fields to something other than the default (*string (varchar(40))*) during the initial installation of the database you need to execute a script. The script is named:

For SQL Server: *update_customer_id_data_type_60_sqlserver.sql*

For Oracle: *update_customer_id_data_type_60_oracle.sql*

Before you execute the script, you must edit it and substitute **<cust_id_datatype>** with the actual data type you chose during the initial database installation. This can be found in the `SI_CUSTOMER_ID_DATATYPE` field in the `SYSTEM_INFO` table. If the `SI_CUSTOMER_ID_DATATYPE` field is empty, it means you did not change the data type during installation and need not execute the script.

Updating instance definition

A database instance definition now has a new property called short identifier. The short identifier is a one or two character long ID which is used in the shortened URL functionality to identify the database instance. The legal characters for this id are in the A-Z range. The default value is 'A'.

The short identifier makes it possible to move the instances between servers without problem for the shortened URLs. For a site with more than one database instance it is important to assign each instance a unique short identifier. Using only one character for this ID will result in a shorter URL.

During the upgrade process, you must edit the properties for each instance in **Dialogue Admin** and supply a short identifier value.

Upgrading to .NET 4.5

All Portrait Dialogue components using .NET has been upgraded to use .NET version 4.5. This means you must make the following changes to your environment during an upgrade:

- .NET 4.5 must be installed on application and web servers. Note that some 3rd party components are still using the old .NET framework, so you still need to have .NET 3.5 installed.
- All Portrait Dialogue web applications must run in ASP.NET v4.0 Classic application pool.
- In installations where custom made .NET plug-ins are in use, all plug-ins must be recompiled targeting .NET 4.5. Note that you need Visual Studio 2012 or later to target .NET 4.5.

Changes to web applications configuration

The web.config files used by the web applications have several changes due to the applications being upgraded to .NET 4.5. Existing web.config files will be overwritten and automatically updated during web application installation, but the changes are listed here in case you want to make copies of your existing files and make the changes manually.

Customer View, Report Portal, Report Viewer and Telemarketing

1. Update compilation as follows:

```
<compilation defaultLanguage="c#" debug="false" targetFramework="4.5"/>
```

2. Add the following in the <system.web> section:

```
<pages controlRenderingCompatibilityVersion="3.5" clientIDMode="AutoID"/>
```

Customer Web Access, Questionnaire Preview, Web Utilities

1. Update compilation as follows:

```
<compilation defaultLanguage="c#" debug="false" targetFramework="4.5"/>
```

2. Update the following in the <system.web> section:

```
<pages validateRequest="false" controlRenderingCompatibilityVersion="3.5" clientIDMode="AutoID"/>
```

Web Portal

1. Remove section group named `system.web.extensions` from `<configSections>`.
2. Update compilation as follows:

```
<compilation defaultLanguage="c#" debug="false" targetFramework="4.5"/>
```

3. Remove the subsections below from subsection `httpHandlers` in `<system.web>` section:

```
<remove verb="*" path="*.asmx" />
```

```
<add verb="*" path="*.asmx" validate="false" type="System.Web.Script.Services.ScriptHandlerFactory, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
```

```
<add verb="*" path="*_AppService.axd" validate="false" type="System.Web.Script.Services.ScriptHandlerFactory, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
```

```
<add verb="GET,HEAD" path="ScriptResource.axd" validate="false" type="System.Web.Handlers.ScriptResourceHandler, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
```

4. Remove the subsections below from subsection `httpModules` in `<system.web>` section:

```
<add name="ScriptModule" type="System.Web.Handlers.ScriptModule, System.Web.Extensions, Version=3.5.0.0, Culture=neutral, PublicKeyToken=31BF3856AD364E35" />
```

5. Add the following in the `<system.web>` section:

```
<pages controlRenderingCompatibilityVersion="3.5" clientIDMode="AutoID"/>
```

```
<httpRuntime requestValidationMode="2.0" />
```

6. Replace the `<system.codedom>` section:

```
<system.codedom>
  <compilers>
    <compiler language="c#;cs;csharp" extension=".cs" type="Microsoft.CSharp.CSharpCodeProvider, System, Version=4.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" warningLevel="4" compilerOptions="/warnaserror-">
      <providerOption name="CompilerVersion" value="v4.0" />
    </compiler>
  </compilers>
</system.codedom>
```

7. Update runtime section as follows:

```
<assemblyBinding appliesTo="v2.0.50727" xmlns="urn:schemas-microsoft-com:asm.v1">
```

Dashboard

1. Remove section group named `system.web.extensions` from `<configSections>`.
2. Update compilation as follows:

```
<compilation defaultLanguage="c#" debug="false" targetFramework="4.5"/>
```

3. Remove the subsections below from the `<system.web>` section:

```
<pages>
```

```
<httpHandlers>
```

```
<httpModules>
```

4. Add the following in the `<system.web>` section:

```
<pages controlRenderingCompatibilityVersion="3.5" clientIDMode="AutoID"/>
```

Upgrading Facebook and Twitter integration

In Portrait Dialogue 5.1 and 5.2, plugins for integration with Facebook and Twitter was provided by services on request. These plugins are now part of the standard product. Customers which have these plugins installed should be able to upgrade without problems, as long as the plugins have been installed as recommended by the documentation provided with them.

Upgrading Portrait HQ

To upgrade to the latest version of Portrait HQ (includes the Portrait Shared Server), complete the following steps:

1. Uninstall the Portrait HQ component: Portrait Shared Server (via **Control Panel > Uninstall a program**).
2. Re-install Portrait HQ, DWH SSIS packages, and Reschedule the DWH population. For more information on how to do this, see *Installing Portrait Shared Server* in the *Portrait Dialogue Server Installation Guide*.
3. Configure Portrait HQ client integration. For more information, see *Configuring Portrait HQ client integration* in the *Portrait Dialogue Client Installation Guide*.

Miscellaneous tasks when upgrading from v6.0.0 and below

Enabling Link Tracking Integrity Checking

In version 6.0 SP1, a validation mechanism is introduced for link tracking. This ensures the integrity of tracked URLs in email and other messages, and protects against phishing attacks. The mechanism uses a check sum (in the URL) for validating that the destination URL is original and has not been tampered with. For more information, see *Link Tracking* in the *Portrait Dialogue Reference Guide*.

The validation mechanism is set to *off* by default to ensure compatibility with URLs in messages that have been sent out in previous versions of Portrait Dialogue. To turn validation on, open the `web.config` file (located in: `<WebUtilities>\LT\`) and set the `<checksum enable>` value to `true`:

```
<checksum enable="true">
  <instances>
    <!--<instance name="InstanceName" enable="true" defaultRedirect=""
/>-->
  </instances>
</checksum>
```

Note: For existing Portrait Dialogue users upgrading to 6.1, we recommend turning `checksum` validation on after a period of time when the effect of no longer supporting old links is negligible. For new Portrait Dialogue users, we recommend turning `checksum` validation on as part of the initial installation.

Upgrading to version 6.1

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Introduction

All upgrade scripts are located in the `SQL\Upgrade Scripts\6.1` folder on the installation media (DVD/ZIP file).

Upgrading an Oracle RDBMS database

The last database changes came in version 6.1 (6.1.0).

Note that your Oracle database server and client software must be patched to the latest Oracle release. At the time of writing, this means Oracle 11g version 11.2.0.1 or later or Oracle 12c version 12.1.0.1 or later.

Upgrading from version 6.0 to 6.1.0 and above

- Make sure your database has been upgraded to the latest 6.0 database version (6.0.1).
- Run the script `v6_1_0chg_oracle.sql`.

Upgrading a Microsoft SQL Server database

The last database changes came in version 6.1 (6.1.0).

Upgrading from version 6.0 to 6.1.0 and above

- Make sure your database has been upgraded to the latest 6.0 database version (6.0.1).
- Run the script `v6_1_0chg_sqlserver.sql`.

Support for temporary tables in Oracle installations

Portrait Dialogue 6.1 introduces support for temporary tables in installations running on an Oracle database. To enable this support, you need to do the following changes in the parameter collection *System data access*.

- Set parameter `TempDatabase` to blank, or the name of the schema where you want to create the temporary tables.
- Set parameter `UseTempTablesForMessages` to true.

- NB! **Do not** set parameter `UseTempTablesInDialogs` to true. Temporary tables in dialogues are primarily meant to help concurrency in SQL Server installations and will decrease performance.

Temporary tables are described in greater detail in the Portrait Dialogue Reference Guide.

Setting the parameter `DialogParticipantChunkSize` in Oracle installations

Portrait Dialogue 6.1 introduces support for running dialogue operations in parallel chunks. The default chunk size is governed by the parameter `DialogParticipantChunkSize` in the parameter collection *System data access*. When upgrading your system, this value will automatically be set to 2,000 which is the recommended value for SQL Server installations. If you are upgrading an Oracle installation, you should change this value to 20,000 which is better suited.

Chunking and parallel execution is described in greater detail in the Portrait Dialogue Reference Guide.

Database columns `PART_STAMP` are removed

The `PART_STAMP` columns are removed from the database schema. More specifically, this applies to the columns `DP_PART_STAMP`, `DPL_PART_STAMP`, `DOS_PART_STAMP` and `DOL_PART_STAMP` in the tables `DLG_PARTICIPANT`, `DLG_PARTICIPANT_LOG`, `DLG_OPR_SPEC` and `DLG_OPERATION_LOG`. These columns were meant for functionality which has never been implemented and are removed as part of a general database cleanup in dialogue related tables.

Upgrading Portrait Shared Server

Upgrading Portrait Shared Server

The introduction of the Analytics Data Server in this release of Explorer affects:

- Reports. As the Excel reports generated from Explorer relied on the use of Datasets, all reports will now no longer be valid and will not be capable of being refreshed once the upgrade has been completed. Any report templates stored in the Portrait Shared Repository will need to be manually deleted once the upgrade has been completed.
- Card Visualizations. Customer card visualizations may no longer be valid due to the changes to allow Explorer to work with its own database. The cards may need to be re-created depending upon the nature of the card.

Uninstalling Portrait HQ

Uninstalling SSIS Simulation packages

1. Log on to your SQL Server machine that is running SQL Server Integration Services.
2. In **Windows Explorer**, browse to the folder where the Simulation SSIS packages was installed. (By default, the install location will be <i>iohome</i>\SSIS). Delete the SSIS folder and all of its content.

Uninstalling DWH Populate package

1. Log on to your SQL Server machine that is running SQL Server Integration Services.
2. Click **Start > Control Panel > Uninstall a program**.
3. Select **Portrait Shared Server SSIS Package** and click **Uninstall**.
4. Follow the wizard prompts to uninstall Portrait Shared Server SSIS Package.
5. In **SQL Server Management Studio**, connect to the SQL Server that is running SQL Server Integration Services:
 - Expand the **SQL Server Agent\Jobs** section in the **Object Explorer**.
 - Right-click the job that runs the DW Populate SSIS package and select **Delete**.

Uninstalling Portrait HQ components

Use the following procedure to uninstall your Portrait Shared Server (PSS) component.

1. Log on to your Portrait Shared Server machine.
2. Back up configuration files that you have modified since the original installation. The configuration files that you may have modified include:
 - C:\Program Files (x86)\PST\Portrait Shared Server\Marketing HQ\web.config
 - C:\Program Files (x86)\PST\Portrait Shared Server\Portrait Shared Services\web.config
 - C:\Program Files (x86)\PST\Portrait Shared Server\Portrait Shared Services\bin\config\Portrait.Mas.Cms.Services.Authorization.config
 - C:\Program Files (x86)\PST\Portrait Shared Server\Portrait Shared Services\bin\config\Portrait.Mas.Cms.Services.IO.config for version 5.5
 - C:\Program Files (x86)\PST\Portrait Shared Server\SSIS\DWPopulate.dtsConfig
3. Click **Start > Control Panel > Uninstall a program**.
4. Select **Portrait Shared Server** and follow the wizard prompts to uninstall the Portrait Shared Server.

Reinstalling Portrait HQ

Installing PSS features

The Portrait Shared Server installer can install any of the following features:

- **Portrait Shared Server.** Provides the HQ web application and the Portrait Shared Services web services that integrate the Portrait product suite.
- **Database Administration.** Enables administration of the databases used by Portrait Shared Server. Install this feature on the SQL Server database server.
- **Data Warehouse Refresh.** Provides the SQL Server Integration Services packages that populate the Portrait Data Warehouse. Install this feature on the Integration Services server.
- **Reports.** Provides SQL Server Reporting Services reports that report on campaign performance. Install this feature on the Reporting Services server.
- **Tasks.** Provides a SharePoint site that manages tasks created when working with campaigns. Install this feature on the SharePoint server.

To install any of these features:

1. Log on to the server where Portrait Shared Server feature(s) are to be installed.
2. Open File Explorer and navigate to `Portrait Shared Server` on the release media (.iso).
3. Right-click `setup.exe` and click **Run as administrator**.
4. Click **Next** on the **Welcome** page.
5. Accept the license terms and conditions and click **Next**.
6. Accept the default destination folder and click **Next**.
7. Choose the installation type and click **Next**. When installing the full set of Portrait Shared Server features, click **Complete**, otherwise click **Custom**.
8. On the **Custom Setup** screen (shown if a custom installation type was selected in the previous step), select **This feature will be installed on local hard drive** for the features you wish to install. Select **This feature will be not be available** for features you do not wish to install. Click **Next**.
9. Click **Install** on the **Ready to Install the Program** dialog.
10. On the **InstallShield Wizard Completed** screen, click **Finish**.

Review Portrait Shared Server AppPool settings

This release of the Portrait Shared Server implements session management within the dedicated Portrait Shared Server AppPool worker process. It is necessary to manage the way IIS recycles the AppPool worker process to ensure that user sessions do not encounter unexpected errors. It is recommended that AppPool recycling is configured to occur once a day during quiet periods e.g. at 1 a.m. to cause as little disruption as possible.

To configure Portrait Shared Server AppPool recycling as recommended above:

- a) Open a Powershell prompt with elevated permissions and enter the following commands:
- b) `Clear-ItemProperty ("IIS:\AppPools\Portrait Shared Server AppPool") -Name recycling.periodicRestart.schedule`
- c) `New-ItemProperty ("IIS:\AppPools\Portrait Shared Server AppPool") -Name recycling.periodicRestart.schedule -Value ([TimeSpan]::FromHours(1))`
- d) `Set-ItemProperty ("IIS:\AppPools\Portrait Shared Server AppPool") -Name recycling.periodicRestart.time -Value ([TimeSpan]::FromHours(0))`
- e) `Set-ItemProperty ("IIS:\AppPools\Portrait Shared Server AppPool") -Name processModel.idleTimeout -Value ([TimeSpan]::FromHours(24))`

Review custom PSS settings

It is necessary to identify which PSS settings have been changed in your environment, so that the same values can be re-applied to the upgraded installation. The table below summarizes all settings you may have changed.

Config File Name	Property Name	Identifier in config file	Default Value
HQ Web.config	UI Culture	UICulture	EN
HQ Web.config	Culture	Culture	EN
HQ Web.config	CampaignApprovalEnabled	CampaignApprovalEnabled	False
HQ Web.config	LogLevel	LogLevel	Verbose
HQ Web.config	ReportIntegrationEnabled	ShowReportsLink	False
HQ Web.config	ReportServerURL	ReportsUri	http://localhost/ReportServer
PSS Web.config	AnalyticsIntegrationEnabled	AnalyticsIntegrationEnabled	False
PSS Web.config	Analytics-DataServerURL	Endpoint url section	http://localhost:8080/analytics-data-server
PSS Web.config	DialogueIntegrationEnabled	DialogueIntegrationEnabled	False
PSS Web.config	DialogueServerURL	Endpoint url section	http://localhost/MHDialogServer-API
PSS Web.config	DialogueInstance-Name	PCM.InstanceName	Default
PSS Web.config	IOIntegrationEnabled	IOIntegrationEnabled	False
PSS Web.config	IOServerURL	Endpoint url section	http://localhost
PSS Web.config	SharePointIntegrationEnabled	SharePointIntegrationEnabled	False
PSS Web.config	Share-PointServerURL	Endpoint url section	None
DWPopulate.dtsConfig	DW_Connection-String		Provider=SQLNCLI11;Data Source=LOCALHOST;Integrated Security=SSPI;Initial Catalog=PortraitDW
DWPopulate.dtsConfig	InstallationDirectory		.

Config File Name	Property Name	Identifier in config file	Default Value
DWPopulate.dtsConfig	IO_BatchCopySize		2000
DWPopulate.dtsConfig	IO_ConnectionString		Provider=SQLNCLI11;Data Source=localhost;Integrated Security=SSPI;Initial Catalog=PortraitIO
DWPopulate.dtsConfig	IO_MinSourceHistory-Rows		2000
DWPopulate.dtsConfig	IO_Present		1
DWPopulate.dtsConfig	PD_ConnectionString		Provider=OraOLEDB.Oracle;Data Source=[data source];Password=[password];User ID=[User id]
DWPopulate.dtsConfig	PD_SQL_Connection-String		Data Source=localhost;Initial Catalog=PDSYSTEMREPORTSAMPLEDATA1;Provider=SQLNCLI11;Integrated Security=SSPI;
DWPopulate.dtsConfig	PD_IsOracle		0
DWPopulate.dtsConfig	PD_Present		0
DWPopulate.dtsConfig	PDADO_Connection-String		Data Source=[Data source];Persist Security Info=True;User ID=[User ID];Password=[password];Unicode=True
DWPopulate.dtsConfig	PSR_Connection-String		Provider=SQLNCLI11;Data Source=LOCALHOST;Integrated Security=SSPI;Initial Catalog=PortraitPSR
DWPopulate.dtsConfig	TransferOnly		0

Take note of any setting value that differs from the default.

Configuring PSS features

1. Log on to the application server.
2. Run `Portrait Powershell` as an administrator.

3. Run command `cd "C:\Program Files (x86)\PST\Portrait Shared Server\Administration"`
4. Run command `CreatePortraitDatabases.ps1` with existing PSR and PDW database names to upgrade the databases. See [CreatePortraitDatabases.ps1](#) for a description of the arguments to this script.
5. Run command `SetPSSDatabaseConnections.ps1`. See [SetPSSDatabaseConnections.ps1](#) for a description of the arguments to this script.
6. Run command `SetupWebsites.ps1`. See [SetupWebsites.ps1](#) for a description of the arguments to this script.

Reapply custom PSS settings

To re-apply the Portrait Shared Server custom settings you identified in [Review custom PSS settings](#) on page 64:

1. Go to `C:\Program Files (x86)\PST\Portrait Shared Server\Portrait Shared Services\bin\config` and copy file `Portrait.Mas.Cms.Services.Authorization.config.template` and `Portrait.Mas.Cms.Services.IO.config.template` and paste at `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services`. Delete the `.template` extension of both files.
2. If you have custom settings for field segmentations, field exclusions, external field look-ups or secondary audiences (in `Portrait.Mas.Cms.Services.IO.config`), then this configuration needs to be applied to the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\Portrait.Mas.Cms.Services.IO.config`.
3. If you have custom settings for elements `Domain`, `DomainGroupRoleMappings`, `RolePermissions` and `OperationPermissions` (in `Portrait.Mas.Cms.Services.Authorization.config`), then this configuration needs to be applied to the file `%PROGRAMDATA%\Pitney Bowes Software\Portrait Shared Services\Portrait.Mas.Cms.Services.Authorization.config`.
4. If you have any custom HQ settings for logging levels, Campaign Approval or display language, then run script `AdminSettings.ps1` to apply your settings. See [AdminSettings.ps1](#) for a details on how to run this script.
5. If you have a custom `ReportIntegrationEnabled` setting, run script `ReportIntegration.ps1` to apply your setting. See [ReportIntegration.ps1](#) for a details on how to run this script.
6. If you have custom configuration for the `AnalyticsIntegrationEnabled` setting, run script `ExplorerIntegration.ps1` to apply your setting. See [ExplorerIntegration.ps1](#) for a details on how to run this script.
7. If you have custom configuration for the `PDIntegrationEnabled` setting, run script `DialogueIntegration.ps1` to apply your setting. See [DialogueIntegration.ps1](#) for a details on how to run this script.
8. If you have custom configuration for the `IOIntegrationEnabled` setting, run script `IOIntegration.ps1` to apply your setting. See [IOIntegration.ps1](#) for a details on how to run this script.
9. If you have custom configuration for the `SharepointIntegrationEnabled` setting, run script `SharepointIntegration.ps1` to apply your setting. See [SharepointIntegration.ps1](#) for a details on how to run this script.

Reapply custom Portrait Data Warehouse refresh settings

To re-apply the Portrait Shared Server custom settings you identified in [Review custom PSS settings](#) on page 64:

1. Log on to the server that is running SQL Server Integration Services (SSIS).
2. Search for Portrait PowerShell on the **Start** screen.
3. Open the Portrait PowerShell application.
4. Run the command `SSISIntegration.ps1`. See [SSISIntegration.ps1](#) for the syntax of this command. Ensure that you provide your custom Portrait Data Warehouse refresh settings as parameters to this script.

`SSISIntegration.ps1` schedules a PDW refresh every hour. To change the refresh schedule, edit the schedule of the `PopulateDW` SQL Agent job in SQL Server Management Studio.

If you have custom values for the `IO_BatchCopySize`, `IO_MinSourceHistoryRows` or `Transfer-Only` settings, then they must be applied by editing the file `C:\Program Files (x86)\PST\Portrait Shared Server\SSIS\DWPopulate.dtsConfig`.

Mandatory Tasks

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Refreshing system data

After you have run the script(s) to upgrade the database to the correct version, you must run the Refresh-SystemData program to refresh system SQLs and other system data. **This must also be done if you upgrade to a version without any database changes.** The program is located in the `SQL\SystemData` folder on the CD together with the XML files that contains the actual system data. If your Dialogue Server is running when you execute the program, you must **shut down the Dialog Server COM+ application** after the program has finished executing. This has to be done in order to clear the internal cache of the Dialogue Server.

The program must be run from the command line and takes the following parameters as input:

Parameter	Description
-A	The action to be taken. Use ALLSYS to update all system data (always use this if you are not told otherwise by Customer Support), use SQLDEF if you only want to update SQL definitions. The value WEBMOD is no longer in use.
-T	Target database, can be SQLSERVER or ORACLE.
-S	Name of database server. For Oracle, this is the TNS alias, for MS SQL Server this is the name of the server where the database is located.
-D	Name of the database. This is only applicable for MS SQL Server.
-U	Database user name. This must be the user that owns the Dialogue Server tables in the database.
-P	Database user password.
-W	Optional. If set to True, log in to MS SQL Server use windows authentication instead of SQL Server authentication (the user name and password parameters are not needed). This is not applicable for Oracle.
-L	Optional. Language code (only used when changing system data language).
-O	Optional. Logs all messages from the program to the file specified in addition to the screen.
-E	Optional. If set to True, more reports from the program about what it is doing will appear. This is mainly useful for debugging/error reporting.
-X	Optional. The directory where XML files with system data are located. If they are located in the directory that you start the program from, this parameter can be ignored.
-Y	Optional. The name and location of the system tables XML file. This parameter is only necessary if you change the name of the system tables XML file to something other than <code>system_data_definition.xml</code> .

Upgrading .Net plug-ins

In installations where custom made .Net plug-ins is in use, special care has to be taken during an upgrade.

A plug-in project references the file `MHPluginTypeLibrary.tlb`, which describes the Dialogue Server interface. This file is dependant on the Dialogue Server and will change with the server from version to version. A plug-in must use the correct version of this file to work correctly.

This can be done in two ways (method 1 is the recommended one):

1. The file can be found in the `DialogServer` subfolder in your server installation. You must re-import (reference) this file in your Visual Studio plug-in project and then recompile the project.
2. The alternative will be to copy the file `Interop.MHPluginTypeLibrary.dll` to the `bin` folder where the plug-in is located. You do not have to recompile when you do this. This file is located on the installation CD in the `Samples\DotNetPlugins\MHPluginTemplateLibrary\bin\Debug` folder. This file is the assembly used by the .Net runtime.

SQL Server Support

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SQL Server Support

An important feature in SQL Server is the row versioning-based isolation levels, especially the read committed isolation that uses row versioning when the `READ_COMMITTED_SNAPSHOT` database option is `ON`. This option ensures database locking behaves similar to Oracle, and improves performance of the applications. You should turn this on by executing the statement:

```
ALTER DATABASE database_name SET  
READ_COMMITTED_SNAPSHOT ON
```

where `database_name` is the name of the database where Portrait Dialogue is installed. You should also turn this on for any customer databases accessed by Portrait Dialogue.