Hyland Preferences Service

Update Guide

Version: 3.0.x

Hyland

Documentation Notice

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Hyland Preferences Service Update Guide

This document provides important information about updating Hyland Preferences from a previous version to a newer version. We recommend you read the entire document before you update Hyland Preferences Service or its database.

Prepare for the update

Complete backups of all Hyland Preferences Service data, including configurations, before beginning any update installation. Neither Hyland Software, nor any of its authorized resellers are responsible for lost data caused by the update procedure described in this document.

Before updating your Hyland Preferences Service system, verify that your system matches the requirements listed in the Hyland Preferences Service Technical Specifications.

Update Hyland Preferences Service

This release contains updates to the Hyland Preferences Service on Windows or Linux running an external SQL database, such as Oracle or Microsoft SQL. Follow the steps in the procedure below that describes your environment and DBMS.

Note Before beginning an update of your Hyland Preferences Service, perform a backup of your database.

Update Hyland Preferences Service on Windows

To update Hyland Preferences Service on a Windows operating system, complete the following procedures.

1. Perform a backup of your database.
2. Verify your Hyland Preferences Service version.
3. Stop the Hyland Preferences Service.
4. Back-up your settings.
5. Download updated files.
6. Update the SQL or Oracle database.
7. Update the Hyland Preferences Service.
8. Verify your upgrade.

Perform a backup of your database

Perform a full backup of your database following the documentation for your database.

Verify your Hyland Preferences Service version

Before you begin your update, verify your current version of Hyland Preferences Service. To find this information, view the properties for the Hyland.Preferences.Service.Host.exe file.

To determine the current version, complete the following steps.

1. In Windows Explorer, navigate to the Hyland.Preferences.Service.Host.exe file. The default location for this file is *[drive]*:\Program Files\Hyland\Hyland Preferences Service.

2. Right-click **Hyland.Preferences.Service.Host.exe** and select **Properties**.

3. In the **Properties** dialog box, click the **Details** tab to view the file version.

Stop Hyland Preferences Service

To update your system, you must stop the Hyland Preferences Service. The installation wizard automatically stops the service, but you can also complete the following steps to stop the service manually.

Installed as a Windows Service

If the Hyland Preferences Service is installed as a Windows service, complete the following steps.

1. Open the Windows **Start** menu.

2. Search for and open **Services.msc**.

3. Right-click the **Hyland Preferences Service** and click **Stop**.

Installed as an IIS Hosted Service

If the Hyland Preferences Service is installed as an IIS website, complete the following steps.

1. Open **Internet Information Services (IIS)**

2. In the **Connections** pane, locate the site that contains the Hyland Preferences Service.
   Note The name and location of the site are configurable during installation.

3. Right-click the site, click **Manage Website** and then click **Stop.**

Backup your settings

When performing an upgrade, the installer migrates your existing **appsettings.json** and **hosting.json** files. However, we recommend backing up these files as a safety precaution to ensure you retain your unique customizations. To back up your settings, complete the following action.

- Copy your configuration files to a directory other than the installation directory, for example **c:\tmp**.

Download updated files

To update your Hyland Preferences Service build, you must download the updated version for the service as well as database incremental files. To obtain Perceptive product installation files, contact the Hyland Software Technical Support group. For a list of Technical Support phone numbers, go to hyland.com/pswtscontact.

Note Download the correct installer version based on how Hyland Preferences Service is hosted. If hosted by IIS download **Hyland.Preferences.Service.<version>.msi**. If hosted as a Windows service download **Hyland.Preferences.Service.WindowsService.<version>.msi**.

Update the SQL or Oracle database

You must run the appropriate incremental files for your database application and the current version of Hyland Preferences Service. Follow the instructions appropriate for your RDBMS for running an incremental database upgrade script. A qualified database administrator should perform this action. For more information on best practices for you database, refer to the Hyland Preferences Service Installation Guide.

Note If you are updating an Oracle database you may choose to delete and temporarily disable the Oracle recycle bin prior to running the upgrade script. This prevents potential errors related to objects that exist in the recycle bin.

Upgrade to 3.3.0

In version 3.3.0, additional constraints were added to the database. The 3.0.0 incremental script will cleanup any duplicate user information prior to applying those constraints. If duplicate user information is found, a backup will be created, and those user entries will be deleted from the database.

The 3.0.0 incremental script can be run from any version of the User Preferences Service database. It is not necessary to run the 1.0.0 to 2.0.0 incremental prior to the 3.0.0 incremental if updating from version 1.0.0.

Upgrade from 1.0.0 to 2.0.0

In version 2.0.0, the **SCHEMA_VERSION** table was added to the Hyland Preferences Service database to track the database schema version.

Run the correct 1.0.0 to 2.0.0 incremental script for your database management system. After this update, you can reference the **SCHEMA_VERSION** table to determine your current schema version for future incremental scripts.

To run the incremental script as the USRPREFSVC user, ensure the user has the **create table** privilege. Otherwise, run the script as a different user with the appropriate privileges. For more information, contact your database administrator.

Update the Hyland Preferences Service

Complete the following steps to update the Hyland Preferences Service. For more detailed information about installing the Hyland Preferences Service, refer to the Hyland Preferences Service Installation Guide.

1. Run the installer as administrator.

2. Compare the previous configuration files from your backup copy with the new configuration files. The Windows installer migrates your previous configuration files. Refer to Appendix B for updates to configuration files.

Note Configuration files are backed up in the installation directory under **_backup > [timestamp].**

Verify your upgrade

After completing all steps to upgrade the Hyland Preferences Service, verify that the service is running and can connect to the database by navigating to **http://<server-address>:<port>/healthcheck**.

Notes

- Healthy indicates that the service has successfully started.

- Unhealthy indicates an issue occurred when starting the service. Refer to the Hyland Preferences Service logs to identity the issue.

Update Hyland Preferences Service on Linux

To update Hyland Preferences Service on a Linux operating system, complete the following procedures.

1. Perform a backup of your database.

2. Stop the Hyland Preferences Service.

3. Backup your settings.

4. Download updated files.

5. Update the SQL or Oracle database.

6. Update the Hyland Preferences Service.

7. Verify your upgrade.

Perform a backup of your database

Perform a full backup of your database following the documentation for your database.

Stop the Hyland Preferences Service

To stop the Hyland Preferences Service on Linux, execute the following command.

```
systemctl stop hyland-preferences.service
```

Backup your settings

Back up your configuration files to ensure you retain your unique customizations. To copy configuration files in **/hyland-preferences-service** to a backup directory, complete the following action.

- Backup appsettings.json and hosting.json by running the following commands.

```
cp /hyland-preferences-service/appsettings.json /<path to backup file>
cp /hyland-preferences-service/hosting.json /<path to backup file>
```

Download updated files

To update your Hyland Preferences Service build, you must download the updated version for the service as well as database incremental files. To obtain Perceptive product installation files, contact the Hyland Software Technical Support group. For a list of Technical Support phone numbers, go to hyland.com/pswtscontact.

Update the SQL or Oracle database

You must run the appropriate incremental files for your database application and the current version of Hyland Preferences Service. Follow the instructions appropriate for your RDBMS for running an incremental database upgrade script. A qualified database administrator should perform this action. For more information on best practices for you database, refer to the Hyland Preferences Service Installation Guide.

Note If you are updating an Oracle database you may choose to delete and temporarily disable the Oracle recycle bin prior to running the upgrade script. This prevents potential errors related to objects that exist in the recycle bin.

Update the Hyland Preferences Service

Complete the following steps to update the Hyland Preferences Service on Linux. For more information about installing the Hyland Preferences Service, refer to the Hyland Preferences Service Installation Guide.

Note The default **hyland-preferences-service** installation directory is **/opt/hyland-preferences-service**.

1. Use the **mv** command to move the **hyland-preferences-service-<version>.tar.gz** file to the parent folder of the **hyland-preferences-service** directory.

2. From the parent folder of **hyland-preferences-service**, unzip the tar.

   ```
   tar –xzvf hyland-preferences-service-<version>.tar.gz
   ```

3. Copy previously backed up configuration files into **hyland-preferences-service**

   ```
   cp /<path to backup file>/appsettings.json /hyland-preferences-service
   cp /<path to backup file>/hosting.json /hyland-preferences-service
   ```

   Note Refer to Appendix B for configuration changes by release. After manually restoring your configuration files, you may still need to make updates for the service to run.

4. Remove or backup the **hyland-preferences-service-<version>.tar.gz** and the **setup.sh** files created while unarchiving the installation files.

Start the Hyland Preferences Service

• Start Hyland Preferences Service by running the following command.

   ```
   systemctl start hyland-preferences.service
   ```

Verify your upgrade

After completing all steps to upgrade the Hyland Preferences Service, verify that the service is running and can connect to the database by navigating to **http://<server-address>:<port>/healthcheck**.

Notes

• Healthy indicates that the service has successfully started.

• Unhealthy indicates an issue occurred when starting the service. Refer to the Hyland Preferences Service logs to identity the issue.

Appendix A: Database Changes by Release

Use the following Appendix to understand the database changes required by each release. The incremental SQL scripts listed in the steps above perform these changes in your database. Carefully review the incremental database script for to understand the details of the changes.

Database Changes	Description of Changes
Incremental 1.0.0.0_to_2.0.0.0.sql	Added table: SCHEMA_HISTORY Added index: USR_SOURCE_IDX01 ON USRPREFSVC.USR_SOURCE
Incremental 2.0.0.0_to_3.0.0.0.sql	

Incremental 3.0.0.0.sql	Updated the USR_SOURCE primary key constraint and removed the EXTERN_SYSTEM, EXTERN_USR_ID columns from the primary key. **SQL Server** Renamed the USR.PK_USR_ID primary key constraint to PK_USR. Renamed the USR_SOURCE.PK_SOURCE_USR_ID primary key constraint to PK_USR_SOURCE. Renamed the USR_PREF_VAL.PK_USR_PREF_VAL_USR_PREF_ID primary key constraint to PK_USR_PREF_VAL. Renamed the USR_PREF_VAL.CHK_USR_PREF_VAL_PREF_VAL_IS_JSON check constraint to CHK_USR_PREF_VAL_IS_JSON. **PostgreSQL** Renamed the USRPREFSVC.USR_SOURCE.PK_SOURCE_USR_ID primary key constraint to PK_USR_SOURCE. **Oracle** Renamed the USRPREFSVC.USR_SOURCE.PK_SOURCE_USR_ID primary key constraint to PK_USR_SOURCE. Updated the USRPREFSVC.USR_SOURCE.USR_SOURCE_IDX01 index to be a unique index. Updated the USRPREFSVC.USR_PREF_VAL.USR_PREF_VAL_IDX01 index and added the LOWER() around the APP_ID and APP_CONTEXT columns to better align with queries.

Appendix B: Configuration Changes by Release

Use the following table to understand the configuration changes required by each release. The installation wizard in Windows migrates your configuration files. In Linux, you must manually backup and restore your configuration files. Refer to this table for required configuration changes between releases.

Configuration changes from 2.0.x to 3.0.x

File Name	Configuration Path	Description of Change
appsettings.json	User.Auth	Add setting: Identity Identity > ValidTokenTypes

Configuration changes from 1.0.x to 2.0.x

File Name	Configuration Path	Description of Change
appsettings.json	User.Auth > KeyIds	Moved setting to User.Auth > SignedToken > KeyIds

	User.Auth	Add settings:
		Identity Identity > Enabled Identity > Authority Identity > ClientId Identity > ClientSecret Identity > Scopes Identity > Provider Identity > ClaimMapping > User Identity > ClaimMapping > System SignedToken SignedToken > Enabled SignedToken > KeyIds > [kid] > Scopes SignedToken > KeyIds > [kid] > ClaimMapping > User SignedToken > KeyIds > [kid] > ClaimMapping > System