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## Upgrade Guide for Unmodified Installations

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## About This Guide

This document focuses on using AddonSoftware® by Barista® (Addon) utilities and wizards to **upgrade a standard, unmodified** Addon installation.

Other documents cover the processes of installing (rather than upgrading) Addon, upgrading an existing installation of legacy Addon (i.e. pre-Barista Addon), and upgrading a modified, existing install of Addon. Refer to the [Which installation type is right for you?](#) topic in the *AddonSoftware Installation and Upgrade Reference* for more details.

### Is this the right document for your scenario?

Use this document if you are

1. Upgrading an existing installation of Addon. You may optionally copy and/or install other application projects (verticals) that are synched into the same instance of Barista and are **not** "mods" projects (see below).

**Do not** use this document if you are

1. Installing Addon for the first time on a system.
2. Migrating from **legacy** Addon (i.e. existing v6/v7 data).
3. Migrating from a non-Addon application to Addon.
4. Upgrading an existing installation of Addon that **has been customized** with a "mods" project. A mods project is a separate application that lists "ADDON" as its Parent System ID and is developed using application replication mode to save Addon customizations in the mods project structure. Refer to the AddonSoftware Upgrade Guide for Modified Installs for this scenario.
5. Upgrading an existing installation of Addon that was installed using the "Quick Copy" option. (See [Understanding the Addon Install Wizard's Install Type and Quick Copy Option.](#))

Access related documents via the [Links to Documents Covering the Installation and Upgrade Processes](#) topic in the References guide.

This guide uses the following terms to distinguish between the installations of Addon involved in the upgrade process.

<b>Term</b>	<b>Refers to</b>	<b>Example</b>	<b>Path to /aon/</b>	<b>Term for Path</b>
"Old"	Current/source instance that's being upgraded	v14.22	/<aon_prod>/v14/v1422/	<old>

“Pre-built”	Downloaded, installed generic Addon .jar	v15.00	/ <code>&lt;bbjhome&gt;</code> /barista/apps/	<code>&lt;bbjhome&gt;</code>
“New”	Upgraded/target instance	v15.00	/ <code>&lt;aon_prod&gt;</code> /v15/v1500/	<code>&lt;new&gt;</code>

**Table 1** Installation/version reference conventions and examples showing the case of upgrading from v14.22 to v15.00.

## Introduction to AddonSoftware by Barista

AddonSoftware® by Barista® was developed and runs within the Barista Application Framework. One installation of BBJ can support many different copies or instances of Barista, each with its own BBJ® database and Barista dictionary. A given copy of Barista can, in turn, be synchronized with any number of applications. In terms of AddonSoftware (Addon), this architecture makes it possible for VARs to install and run several versions of Addon on a single machine (each with its own instance of Barista), and also allows a single instance of Barista to support Addon along with any number of other applications containing Addon customizations and/or verticals.

Addon is available from the BASIS download page ([links.basis.com/getproduct](https://links.basis.com/getproduct)) for quick installation and is evaluation-ready complete with demo data. In addition, the forms and callpoints have all been compiled, and the Barista dictionary tables are populated, all necessary for a successful and comprehensive evaluation. The [AddonSoftware Quick Start Guide](#) covers the installation steps for a basic install.

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## Upgrade Process Flow (Unmodified Installations)

The following outline describes the order in which the upgrade-related steps should be taken when upgrading an unmodified Addon installation.

It is vital to your success that you work through each section completely and in order.

- [Section 1: Preparation](#)
- [Section 2: Upgrade \(Unmodified Install\)](#)
- [Section 3: Testing](#)
- [Section 4: Go Live - Refresh Data](#)

The general process for upgrading is to perform a Quick Start installation of “Pre-built” Addon, use Addon’s *Upgrade Wizard* utility to define the “New” installation, test the installation, and then go live.

The upgrade process differs slightly between minor revision upgrades (e.g. XX.aa to XX.bb) and major revision upgrades (e.g. XX.aa to YY.aa). Understanding this difference is key to some of the steps involved in performing an upgrade. See the [Understanding the Upgrade Process](#) topic in the *AddonSoftware Installation and Upgrade Reference* for more information.

### **W A R N I N G**

**Any installation beyond the simple Quick Start install (e.g. production environments) requires VAR assistance.**

**To run Addon in a production environment, you must move Addon to a different location and synchronize it with its own copy of Barista.**

This not only ensures that you won’t overlay production files should you decide to download/install another demo copy, but also facilitates running more than one copy of Addon, such as running one version in production while you simultaneously install and test an upgrade version.

See the [Which installation type is right for you?](#) topic in the *AddonSoftware Installation and Upgrade Reference* for more information.

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## Section 1: Preparation

The information outlined in this section forms the bedrock for a successful upgrade of an unmodified Addon installation. It is vital that you work through the details in the order and exactly as outlined in the section entitled [Preparation Details](#).

The [Overview](#) is provided only as a general description of the process.

### Preparation Overview

- 1.1. [Backup](#)
- 1.2. [Java JDK](#)
- 1.3. [Available disk space](#)
- 1.4. [Assumptions](#)
- 1.5. [Directory structure](#)

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**Preparation Details**

**1.1. Backup.**

Perform a complete system backup. In addition, it may be convenient to do a backup of just the barista and aon file systems if any are currently in use.

**1.2. Java JDK.**

Ensure that you have installed the Java JDK appropriate for the revision you are upgrading to as noted in the “Operating System Requirements” section of the associated BBJ Readme file ([www.basis.com/readme-bbj](http://www.basis.com/readme-bbj)).

**1.3. Available disk space.**

Consider the amount of available disk space to accommodate Addon, Barista, and any Addon customization projects (including data).

**1.4. Assumptions.**

Ensure that the following installation processing assumptions are true:

- a. The old/source version of Barista Addon **must be a functional version**, i.e., you should be able to launch/run it, and the database must be known to Enterprise Manager and contain all of the necessary User Props (+APDATA, +ARDATA, etc.) to facilitate attaching to the database and doing a dictionary-based data conversion.
- b. Any additional vertical applications were created using the [Barista Create Application Wizard](#).

**WARNING**  
Prior to version 12.10, changes made under Barista’s Default Company (App Company ID = 00000000) and Standard Development (App Product ID = DEV) that are not replicated to a separate application/project are **NOT** upgraded by this process.

- c. **No production applications or data reside in the BBJ default install location (<bbjhome>).**

**WARNING**  
**Production data or programs already residing in <bbjhome> may be lost or overwritten when installing BASIS products.** If you are running Addon from the BBJ default install location, **contact Addon support ([support@addonsoftware.com](mailto:support@addonsoftware.com)) before continuing.**

**1.5. Directory structure.**

Define a three-tier directory structure appropriate for future upgrades.



*The majority of this structure will have been created when Addon was first installed (per the [Directory structure](#) preparatory step in the AddonSoftware Installation Guide).*

*The specific directories you'll need to create depend on the revision you are upgrading from and to. For a minor revision upgrade (e.g. XX.aa to XX.bb), you will need to add at least a minor revision directory (e.g. /vXXbb/). For a major revision upgrade (e.g. XX.aa to YY.aa), you will need to add both the parent directory (e.g. vYY) and its /data/ and minor revision (e.g. /vYYaa/) subdirectories.*

**Figure 1** depicts key folders in the default directory structure for Addon. This structure is appropriate for only Quick Start installations. For production (or development) Addon, a modified structure such as that shown in **Figure 2** makes images and documents version-neutral, so they're accessible via the same pathname across multiple versions of Addon. It also places data files in a location that's neutral across minor revisions.

This modified structure contrasts with the default directory structure which stores application images, saved documents, and data under the aon directory (see red text in **Figure 1**). This default structure is not optimal for a production environment.

```
    /<bbjhome>/
      /barista/
      /apps/
        /aon/
          /cust_images/
          /data/
          /documents/ (Present once a document is saved)
          /images/
```

**Figure 1** Key folders in Addon's default structure (Red text shows the folders that are manually moved/edited for three-tier directory structure.)

```
    /<aon_prod>/ (Manually create. Where aon_prod is top level for the install)
      /cust_images/
      /documents/ (Present once a document is saved)
      /images/
    /<vNN>/ (Manually create. Where NN is the major version number)
      /data/ (Manually create. To house data files, not subfolders)
    /<vnnnn>/ (Manually create. Where nnnn is the minor version)
```



```
    /aon/  
      /data/    (Contains subfolders, not data files)  
    /barista/  
    /<vert_app>/
```

**Figure 2** A file structure such as this is **strongly recommended** for a production or development environment. (Only key folders are listed; highlighted folders correspond to red folders in Figure 1.)

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## Section 2: Upgrade (Unmodified Install)

This section guides you through the specific steps to a successful installation. **It is vital that you work through each step in order and exactly as outlined in the section entitled [Upgrade Details \(Unmodified install\)](#).**

The [Overview](#) is provided only as a general description of the process.

Before starting an upgrade, thoroughly read the relnotes and readme files for the release you are upgrading to. Found at [www.basis.com/readme-bbj](http://www.basis.com/readme-bbj), these documents contain the most current information for each release.

### Upgrade Overview (Unmodified Install)

- 2.1. **STOP** and take special steps if the "Old" Barista Addon is running in the BASIS download area: <bbjhome>/apps/aon.
- 2.2. [Download](#) the new BBj/Barista/Addon release.
- 2.3. [Ensure users are logged out of all BBj-related applications.](#)
- 2.4. [Install](#) the new release.
- 2.5. [Optionally, allow users into BBj-related applications.](#)
- 2.6. [If upgrading from a pre-12.00 version](#), follow special instructions.
- 2.7. [Launch](#) the new "Pre-built" Addon using Barista Installation Manager (BIM).
- 2.8. [Run Addon's Upgrade Wizard.](#)
- 2.9. [Close Addon.](#)
- 2.10. [Close the BIM.](#)
- 2.11. [Copy data into the "New" install for testing.](#)
- 2.12. [Complete auto-launch processes.](#)
- 2.13. [Address trigger considerations.](#)
- 2.14. [Reset Barista Sequence Numbers.](#)

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## Upgrade Details (Unmodified install)

Addon's *Upgrade Wizard* performs the necessary steps for upgrading an existing version of Addon. This section details the steps required for a successful upgrade of an unmodified Addon installation.

- 2.1. **STOP** if the "Old" Barista Addon is currently running in the production area (<bbjhome>/apps/aon/)! Production Addon **must** be relocated out of the BASIS product download location. See the [Assumptions](#) listed in the Preparation Details section.

### WARNING

Addon in the BASIS product download location **must not** be used for production! Data and modifications in the BASIS product download location are at high risk.

- 2.2. [Download](#) the newer version of your choice from [links.basis.com/getproduct](http://links.basis.com/getproduct).
- 2.3. Ensure users are logged out of all BBJ-related applications.

### CAUTION

Running the BASIS installation wizard stops all running BASIS applications. **Ensure no one is using BBJ prior to running the installation wizard.**

- 2.4. [Install](#) the new BBJ/Barista/Addon release.

### WARNING

This process **will overwrite files** already residing in the BBJ default install location (<bbjhome>). **Ensure that no production programs or data exist in this directory structure.** See the [Assumptions](#) in the Preparation Details section.

- 2.5. Optionally, allow users into BBJ-related applications including production Addon.
- 2.6. **If upgrading from a pre-12.00 version**, follow the steps detailed in the section entitled [Special steps when upgrading from a pre-12.00 version \(After installing "Pre-built"\)](#) found in the *AddonSoftware Installation and Upgrade Reference*.



*These steps are **not necessary for versions 12.00 and later.***

2.7. [Launch](#) the newly installed “Pre-built” Addon **using Barista Installation Manager (BIM)**.



*The install will be listed in the BIM grid as*

*ID: BARISTA Description: Barista Application Framework.*

2.8. Run Addon’s *Upgrade Wizard* from within “Pre-built” to create the “New” upgraded installation.



*The Upgrade Wizard copies “Pre-built” Barista and Addon to a separate location and initializes a database for this “New” installation. See the [Understanding the Upgrade Process](#) topic in the AddonSoftware Installation and Upgrade Reference for more details.*

- a. Launch the *Upgrade Wizard* task from the AddonSoftware Administration > Utilities > Install/Upgrade Utilities menu.
- b. **Initial fields** Fill in the initial fields as follows:
  - i. For the ‘**New Database Name**’ field, add an identifier for the “New” database (e.g. AON\_Vnnnn, where nnnn is the version number). This name will be appear in the list of databases in Enterprise Manager and in the list of installations in the BIM grid.
  - ii. For the ‘**New Description**’ field, add a description of the “New” database. This description will be listed in the BIM grid.
  - iii. For the ‘**New aon Location**’ field, key in or browse to the directory where you want the “New” copy of Addon (e.g. /<aon\_prod/v15/v1500/ per example for <new> in [Table 1](#)).



*Use the version-specific directory (<vnnnn>) referred to in the [Directory Structure](#) preparatory step ([Figure 2](#)). Per the recommended directory structure, this version-specific directory is intended for the actual application.*

- iv. For the ‘**Old aon Location**’ field, key in or browse to the parent directory where the **currently running “Old”** Barista/Addon resides (e.g. /<aon\_prod/v14/v1422/ per example for <old> in [Table 1](#)).
- v. If the ‘**Old barista location**’ field and ‘Old sync Backup Dir’ are not filled in automatically after you leave the ‘Old aon Location’ field, manually enter them.



*The ‘Old barista location’ and ‘Old sync Backup Dir’ fields are mandatory. The utility can typically discover and fill them in, but you may need to supply the information depending on the old Barista*

*version and/or old Addon location.*

- vi. Leave the **'Use old modified menu'** checkbox unmarked since it only applies to customized Addon menus and you are upgrading an unmodified install. See [Understanding How Upgrades Handle Menus](#) in the *Installation and Upgrade Reference* guide for more information.
- c. **Top grid** The top grid will contain an entry for each application *other than Addon* that has been synced into the "Old" Barista.
  - i. **Mods project:** If the application is a "mods project," that is, a project created for the purpose of customizing Addon, and with "ADDON" designated as its parent system, then the "Copy" and "Install" boxes will be unchecked by default. **Do not copy or install a mods project via the Upgrade Wizard.** Handling of mods projects is discussed in the AddonSoftware Upgrade Guide for Modified Installs. Refer to that document when working with a mods project.
  - ii. **Vertical project:** If the application is a vertical that does **not** have "ADDON" listed as the parent system, then the "Install" box will be checked by default. You have the option of copying the application to the new location and installing it, or simply installing it from its current location. If you wish to both copy and install the project, then select the "Copy" checkbox as well.



*Addon will be automatically installed, so it is not listed in the grid.*

- d. **Bottom grid** Carefully review the 'Target' values in the bottom grid to ensure they are correct for the new installation.



*The utility merges together the `addon.syn` file from `<bbjhome>` with the "Old" `addon.syn` file. When the same STBL exists in both syn files, the value from the "Old" `addon.syn` file is initially used for the 'Target' value. If the 'Target' value points to an existing directory or existing file under the 'Old aon Location', the path in the 'Target' value is modified by replacing the 'Old aon Location' with the 'New aon Location'.*

- iii. Confirm that the following STBL entries keep images and saved documents in a version-neutral location as illustrated in [Figure 2](#) above.
  - +AON\_IMAGES
  - +CUST\_IMAGES
  - +DOC\_DIR\_PDF
  - +DOC\_DIR\_HTM
  - +DOC\_DIR\_XML
  - +DOC\_DIR\_CSV
  - +DOC\_DIR\_TXT
  - +DOC\_DIR\_XLS
  - +DOC\_DIR\_DEFAULT
  - +DOC\_DIR\_ARCHIVE
- iv. Confirm that the following SYSSTBL and SYSCFG entries are set to store data

files in a non-production test directory.



*By default, the 'Target' data directories will be a test data folder. See the [Upgrade Wizard 'Target' Data STBLs](#) topic in the AddonSoftware Installation and Upgrade Reference for more information.*

- +DIR\_DAT
- +ADDDATA
- +APDATA
- +ARDDATA
- +BMDATA
- +CRDATA
- +GLDATA
- +IVDATA
- +MPDATA
- +OPDATA
- +PODATA
- +PRDATA
- +SADATA
- +SFDATA
- +SYDATA

- v. Confirm that the +MDI\_TITLE STBL provides a unique MDI title.
- e. Click the green arrow [Run Process] button.

**CAUTION**

*Be sure the process is complete before moving to the next steps. The utility creates and syncs new copies of Addon and Barista. This process may take 45 - 60 minutes depending on the speed of your system.*

- f. Click [OK] to complete the *Upgrade Wizard* utility.

2.9. Close Addon.

2.10. Close the BIM.



*The new instance of Addon will not appear in the BIM grid until you close the BIM and relaunch it.*

2.11. Copy data into the "New" install for testing. Every upgrade, whether it involves a minor or major revision change, should be tested to ensure all tasks are functioning correctly. The method you choose for making a copy of data for testing depends on whether this is a minor or major version upgrade, and whether or not the system can be quiesced while the copy is in progress.

**WARNING!**

Skipping this part of the process may compromise your ability to adequately test

your upgrade.

- a. If you are performing a **minor** version upgrade, and are certain that all users can be logged out of the "Old"/source instance for a time, you can copy the current data files into the "New" install with a command such as rsync. If the amount of data to copy is large, you can begin the rsync task ahead of time, copying data to a "scratch" directory of your choosing.
  - i. Consult the AddonSoftware Readme for the version you are upgrading to to ensure that the release has no structural file changes. Readme files are found at [www.basis.com/readme-bbj](http://www.basis.com/readme-bbj).
  - ii. Use rsync or some other file copy command to copy all data files from the "Old" Addon data directory as well as data from any vertical applications that you have copied/installed over to the established test data directories in the "New" instance.
    1. If you began the rsync process earlier, copying data to a "scratch" directory, then at this point, quiesce the system and do a final rsync to the scratch directory to capture incremental changes, then move files from the scratch directory to the test data directories.
    2. If you have not yet copied data, then quiesce the system and rsync data directly into the test data directories.
  - iii. Be sure to retain file permissions when making the copy.

#### **WARNING**

Do **NOT** use this option if there have been structural changes to any of the data files.

- b. If you are performing a major version upgrade, there are very likely structural changes to data files, so using a method like rsync to copy data for testing is not appropriate. Likewise, if you cannot log users out of the "Old"/source instance while copying data, even for a minor version upgrade, then you need a different mechanism to create your test data. In either of these situations, run the EM *Update Wizard* utility from "Old"/source database to copy data into the "New" install for testing.



*This utility copies the Addon data files from the <old> install location to the /<new>/<test data>/ install location--a recommended practice, particularly if you need to keep running your "Old" Addon while performing and testing the "New" Addon installation.*

*Rather than a simple file copy, the EM Update Wizard compares the "Old" and "New" data dictionaries, and uses an Online Copy Job to copy the "Old" data to the "New" location while making any structural modifications (different/additional keys, new fields, etc.).*

*The Online Copy Job processes the entire Barista database (unless the 'Copy Only Changed Table Data Files' checkbox is marked), so it will copy/convert not only Addon files, but also any files from <vert\_app> projects that were sync'd into the "Old" Barista.*

*Because the Update Wizard uses the Online Copy Job, it can copy data while the source files are still in use, and keep the source and destination files in sync until you indicate that the job is finished. This makes it possible to convert large databases without having to shut users out of the system.*

*The specifics of the steps here are based on the Eclipse version of EM, but are generalizable.*

- i. Log into Enterprise Manager as `admin`.
- ii. Double-click 'Databases' in the Databases/SQL node of the EM Navigator pane.
- iii. Single-click on the "Old" database to select it from the databases listed in the grid on the [Databases/SQL] tab.
- iv. Click [Update Wizard] at the top right of the [Databases/SQL] tab.
- v. Click [Next] on the 'Welcome' panel.
- vi. On the 'Data Dictionary and Data File Information' panel:
  1. For the '**New Database Name**' field, leave it blank.
  2. For the '**New Data Dictionary**' field, key in or browse to the location of the "New" dictionary (i.e. /<new>/barista/bbdict/).
  3. For the '**Updated Files Destination**' field, key in or browse to the location of the new test data folder (e.g. /<new>/aon/testdata/).




**IMPORTANT:** The test data folder should be the same one specified for the +xxDATA STBLs' 'Target' path in the Addon Upgrade Wizard.

#### **WARNING**


Do **NOT** mark the 'Copy Only Changed Table Data Files' checkbox.

4. Click [Next].
- vii. Click [Next] on the 'Specify User Property Destinations' panel.




 *A few minutes will elapse while the Wizard processes.*

viii. Click [Next] on the following series of panels.


 *You'll be presented a series of panels asking if you want to copy things in the "Old" dictionary that aren't present in the "New" dictionary. Do **not** select anything on any of these panels.*

ix. Click [Finish] on the final panel.

 *The wizard will begin a dictionary-based version of the EM Online Copy Job.*

x. Double-click 'Online Copy Jobs' in the File System node of the EM Navigator.


xi. Monitor the progress of the Online Copy Job from Enterprise Manager--using the Refresh button to view the progress.

 *It may take a few moments before the job appears in the list.*

xii. When the *Update Wizard's* copy job reaches 100%:

1. Click [Refresh].

2. **Expand the list of files and write down the names of any files with errors, as files with errors are not copied.**

 *See the [Symptom: Error reported by EM Online Copy Jobs utility during EM Update Wizard process](#) topic in the *Installation and Upgrade Reference* guide for tips on addressing errors.*

xiii. Click the copy job name to select it.

xiv. Click [Finish].

xv. Resolve any errors.

2.12. Complete auto-launch tasks.

a. Launch the Barista Installation Manager (BIM).

b. Double-click your "New" instance shown in the grid to launch the "New" instance.

c. Log in as `admin`.

d. Dismiss the Barista welcome message.

e. Allow the auto-launch tasks to complete. The auto-launch tasks that execute at this point include "Create SPROC," "Distribute EM Update Wizard Files," and "Initialize Addon Data," the latter for version-specific conversions. For the "Distribute EM Update

Wizard Files" task, supply

- i. [Updated Files Location](#): enter or browse to the location of the `test data` directory established when initializing the *Upgrade Wizard*.
- ii. [New Database Name](#): enter the database name as provided when initializing the *Upgrade Wizard*.

- 2.13. If triggers are used with code being upgraded, then the trigger definitions will likely need to be updated using BASIS's Enterprise Manager (EM). In addition, any references to old paths within trigger source code may need to be updated. If trigger definition or source files are modified, ensure the changes aren't overwritten by subsequent file copies and/or rsyncs. See [How to Set Up a Hybrid Environment](#) and [Using Triggers for Hybrid Installations](#) for information on triggers.



*The specifics of the steps here are based on the Eclipse version of EM, but are generalizable.*

- a. Add Payroll to the Addon menu.
  - i. Mark the 'Installed?' checkbox for Payroll (App Prod ID: PR) in Barista's *Applications* task on the Barista Administration Maintenance menu.
  - ii. Close and relaunch Addon to display Payroll on the menu.
- b. Protect legacy production data.
  - i. Create a test data directory for the legacy data.
  - ii. Copy legacy production data into the new legacy data test directory.
- c. Copy \*.trigger definition and src files to the legacy test data directory and the "New" AddonSoftware test data directory as specified in [Using Triggers for Hybrid Installations](#).
- d. Edit trigger definitions in Enterprise Manager.
  - i. Log into EM as `admin`.
  - ii. Double-click 'Triggers' in the File System node of the EM Navigator pane.
  - iii. Add a Mounted Directory entry for the new `legacy` test data file location where the \*.trigger files are located.
    1. Single-click on the 'Mounted Directories' node on the [Triggers] tab.
    2. Click the green plus sign in the upper right of that tab.
    3. Browse to the new `legacy` test data file location that you created in the [Protect legacy production data](#) step.
  - iv. **Mounted Directories**: For each trigger file listed in the "Files With Triggers" pane, it may be necessary to update the Working Directory and Config File.
    1. Select the newly-mounted directory from the "Mounted Directories" list.
    2. Double-click each file in the "Files With Triggers" panel to bring up a configuration tab.
    3. Under the General Trigger Settings node, update the 'Config File' and 'Working Directory' entries for the new installation. For example:

- Config File:  
/<new>/barista/sys/config/enu/barista.cfg
  - Working Directory: /<new>/barista/
- v. **Databases:** For each trigger file listed in the “Tables With Triggers” pane, it may be necessary to update the Working Directory and Config File.
1. Select the “New” database from the “Databases” list.
  2. Double-click each file in the "Files With Triggers" panel to bring up a configuration tab.
  3. Under the General Trigger Settings node, update the ‘Config File’ and ‘Working Directory’ entries for the new installation. For example:
    - Config File:  
/<new>/barista/sys/config/enu/barista.cfg
    - Working Directory: /<new>/barista/

#### 2.14. Reset Barista Sequence Numbers.

- a. For both “Old” and “New” instances, launch the Sequence Numbers task from the Maintenance menu under Barista Administration.
- b. Review all records in the “Old” instance, and reset the ‘Last Used Number’ field in the “New” instance for any sequence numbers that have changed.

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## Section 3: Testing

The suggested steps listed in the [Testing Details](#) section are a starting point for verifying the success of your upgraded installation.

The [Overview](#) is provided only as a general description of the process.

### Testing Overview

- 3.1. [Verify paths in Applications and Mounted Systems tasks.](#)
- 3.2. [Verify SYSSTBL data path assignments.](#)
- 3.3. [Verify SYSCFG data path assignments.](#)
- 3.4. [Verify form and callpoint build locations.](#)
- 3.5. [Verify session-specific classpaths.](#)
- 3.6. [Create a separate document location for testing.](#)
- 3.7. [Verify SYSSTBL documents path assignments.](#)
- 3.8. If applicable, [run sanity tests of hybrid environment and triggers.](#)
- 3.9. [Provide testing access to end-users.](#)
- 3.10. [Verify fax/email processing.](#)
- 3.11. [Review BUI Application information in EM.](#)

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## Testing Details

Use the following list to test that the upgrade process was successful. Augment the list with tests specific to your particular install.

If any of the tests fail, consult the [Tips for Troubleshooting Installation/Upgrade Issues](#) section of the *AddonSoftware Installation and Upgrade Reference*.

### WARNING

**Before doing any testing, take steps to ensure test documents do not get sent to customers or vendors via the Document Processing Queue.**

Though the document processor is not started by default with a new install, we recommend ensuring that it is, in fact, stopped prior to testing. This is a wise step toward preventing unwanted faxes or emails being sent to live customers or vendors. Refer to the [Document Processing Queue](#) guide for more details.

- 3.1. Verify that your pathnames are correct in the *Applications* and the *Mounted Systems* tasks.
  - a. Launch the *Applications* task on the Barista Administration > Maintenance menu.
    - i. Navigate to the BASIS International record.
    - ii. Confirm that, for each row with ADDON in the 'Mounted System ID' column, the 'Locale Path' and 'Directory' columns list the paths for the new instance's directories per the directory structure shown in [Figure 2](#).
  - b. Launch the *Mounted Systems* task on the Barista Utilities menu.
    - i. Navigate to the ADDON record.
    - ii. Confirm that the path in the 'Mounted Directory' field matches the paths that are listed in the 'Directory' column of the *Applications* task grid for rows that are associated with the ADDON 'Mounted System ID'.
- 3.2. Verify SYSSTBL data path assignments by modifying data files using an Addon maintenance form.
  - a. Launch the *Vendors* maintenance task from the Accounts Payable Maintenance menu.



*If the instance does not have Accounts Payable licensed, use a different maintenance form such as Customers (AR), Accounts (GL).*

- b. Add or change a record.
- c. Make a note of the Vendor ID for future use.
- d. Save.
- e. Close the form.
- f. Navigate to the test data folder (e.g. /<new>/<aon>/testdata/) per your operating system's method.
- g. Confirm that the timestamp on the data file associated with the form (apm-01) has been

updated.



*Perform a similar test for each of modules licenced for your instance and defined in its `addon.syn`.*

- 3.3. Verify SYSCFG data path assignments by confirming that the SQL engine can find your data using the Record Query or Find functions (available via Barista's View menu).
- a. Launch the *Vendors* maintenance task from the Accounts Payable Maintenance menu.



*If the instance does not have Accounts Payable licensed, use a different maintenance form such as Customers (AR), Accounts (GL).*

- b. Use the Record Query function (available via Barista's View menu) to list the form's records.
- c. Confirm that the changes you made in the previous [test to verify SYSSTBL data path assignments](#) are reflected in the inquiry grid.



*Perform a similar test for each of modules licenced for your instance and defined in its `addon.syn`.*

- d. If desired, back out the change that you made to the Vendor master.
- 3.4. Verify that forms and callpoints are built in the correct locations by making a benign callpoint change.
- a. Launch Barista's *Form Manager* utility.
  - b. Select the AddonSoftware Accts Payable node in the tree on the left.
  - c. Select APM\_VENDMAST in the grid on the right.



*Use a single click to work within Form Manager; a double-click launches Form Designer. The Callpoint Editor, used in the next step, is available via either tool, but if you use the Form Designer, you need to close one more window.*

- d. Launch the Callpoint Editor by selecting 'Edit Callpoints' from the Form Manager's 'Edit' menu.
- e. Add a remark to one of the callpoints.
  - i. Click the AABO callpoint in the tree on the left.
  - ii. Key in `rem` in the upper right pane.
- f. Select 'Build Object' from the Callpoint Editor's 'File' menu to save your changes and build the form.
- g. Navigate to the `/<new>/aon/callpoints/source/` folder per your operating system's

method.

- h. Confirm that the timestamp on the associated `_cpt.src` file (`apm_vendmast_cpt.src`) has been updated.

3.5. Create a separate document location for testing.



*This is recommended but optional. Creating a separate document location isolates test documents. Doing so simplifies go-live, troubleshooting, and a possible rollback.*

- a. Create a directory for test documents.
- b. Edit the `+DOC_DIR*` STBLs in the `addon.syn` file to point to the test document dir.

- `+DOC_DIR_PDF`
- `+DOC_DIR_HTM`
- `+DOC_DIR_XML`
- `+DOC_DIR_CSV`
- `+DOC_DIR_TXT`
- `+DOC_DIR_XLS`
- `+DOC_DIR_DEFAULT`
- `+DOC_DIR_ARCHIVE`

- c. **Run the *Auto-Synchronize Barista*** utility in the “New” instance.

3.6. Verify session-specific classpaths by running a Jasper report.

- a. Run a Jasper report that you have data behind (i.e. *Vendor Detail Listing* or *Customer Detail Listing*).
- b. Confirm that the report runs to completion.




*Failure might indicate a classpath issue or a data issue. Try another Jasper report as a simple way to narrow it down. If multiple Jaspers fail, classpath is the likely cause. Refer to the [Symptom: Jasper failure](#) topic in the *AddonSoftware Installation and Upgrade Reference* for more details.*

3.7. Verify SYSSTBL documents path assignments by running a DocOut report.

- a. Run the *Vendor Name and Address Listing* from the Accounts Payable Reports menu.



*If the instance does not have Accounts Payable licensed, use a different DocOut report such as *Customer Name and Address Listing (AR)*, *Chart of Accounts Listing (GL)*.*

- b. In the DocOut Viewer, click  to save the report.
- c. Navigate to the directory specified by the `+DOC_DIR_PDF` global using your operating system’s method.
- d. Confirm the existence of the `.pdf` (`<auditNumber>_VendorName&AddressListing_<timestamp>.pdf`) in the folder.

3.8. If you are using hybrid Payroll, test your hybrid environment and triggers starting with these basic sanity tests:



## WARNING

**Protect your LIVE DATA.** By definition, the hybrid environment uses data from both the new and the legacy databases. Any testing done on hybrid applications, whether by the VAR or the end-users, can potentially alter live data in the legacy system.

Take appropriate action to protect the live data – including, but not necessarily limited to – **backing up** (and optionally quiescing) the legacy system, **testing against a non-production copy** of the legacy data, and setting **proper security** in Barista and on your legacy database. See the [Tips for Protecting Production Data During Upgrades](#) topic in the Installation and Upgrade Reference.

- a. If you don't see Payroll on the menu in Barista Addon, follow these steps:
  - i. Mark the 'Installed?' checkbox for Payroll (App Prod ID: PR) in Barista's *Applications* task on the Barista Administration Maintenance menu.
  - ii. Close and relaunch Addon to display Payroll on the menu.
- b. Test the PRM-01/prm-01 'After Write' trigger as a sanity test for the Payroll part of the process.
  - i. Launch the Employees task on Addon's 'Payroll Maintenance' menu in Barista.
  - ii. Make a benign change to an existing record or add a new record.
  - iii. Make a note of the 'Employee number so you can back out the change.
  - iv. Save.
  - v. Exit to the menu.
  - vi. Confirm that both new and legacy versions of the data have been updated.
    1. Confirm the timestamp of prm-01 in the "new data file location" you specified when [defining the "New" triggers](#) (e.g. /<new>/aon/testdata/).
    2. Confirm the timestamp of PRM-01 in the legacy version's /data/ directory.
  - vii. If desired, back out the change that you made to the Employee master.
- c. Test the GLM-01/glm-01 'Before Write' trigger as a sanity test for the General Ledger part of the process.
  - i. Launch the Accounts task on Addon's General Ledger Maintenance menu in Barista.
  - ii. Make a change to an existing record or add a new record.
  - iii. Make a note of the GL Account number so you can back out the change.
  - iv. Save.
  - v. Exit to the menu.
  - vi. Confirm that both new and legacy versions of the data have been updated.
    1. Confirm the timestamp of glm-01 in in the "new data file location" you specified when [defining the "New" triggers](#) (e.g. /<new>/aon/testdata/).

2. Confirm the timestamp of GLM-01 and GLM-04 in the legacy version's /data/ directory.
- vii. If desired, back out the change that you made to the Account master.

### **WARNING**

**Protect your LIVE DATA. Ensure that you followed the above steps to back out any changes that you might have made.** By definition, the hybrid environment uses data from both the new and the legacy databases. Any testing done on hybrid applications, whether by the VAR or the end-users, can potentially alter live data in the legacy system.

#### 3.9. Provide testing access to end-users.

- a. Via jnlp:
  - i. Create jnlp config. For more information on JNLP Applications, see:
    1. [Applications](#) in the online BASISHelp at [links.basis.com/basishelp](http://links.basis.com/basishelp).
    2. [JNLP Basics for AddonSoftware](#).
  - ii. Supply the URL to the desired users.
- b. Via shortcuts:
  - i. Create user shortcuts to launch the "New" Addon.



*For shortcuts that launch Barista Addon directly, bypassing BIM, create the shortcuts using the information listed in the Properties field of BIM's Create/Modify Barista Installation form.*


- c. Test Addon programs to verify that all is working correctly.

#### 3.10. Verify fax/email processing by sending a test document via the [Document Processing Queue](#).

### **CAUTION**

**When testing fax/email processing take care to not send test documents to customers or vendors.**

- a. Stop the document processor.
- b. Users who interface with the document queue should test to verify that the queue receives their documents.
- c. To ensure that the document queue doesn't accumulate additional documents, log users off the system for the remaining steps.
- d. Cancel all documents in the queue.
- e. Send a document to the queue to confirm successful transmission.
  - i. Run *Customer Name Listing* from the AR Reports menu.

- ii. From DocOut Viewer, click the  button to launch the document Output Selection form.
  - iii. Mark the Email and Fax checkboxes on the .pdf row of the Section grid.
  - iv. Click the [Create] button.
  - v. Fill in the Process Information form for 'Process Type' *Email*.
    - 1. **Use your own email address** so you can confirm receipt.
    - 2. Click the green arrow [Run Process] button when you have completed the form.
  - vi. Fill in the Process Information form for 'Process Type' *Fax*.
    - 1. **Use your own fax number** so you can confirm receipt.
    - 2. Click the green arrow [Run Process] button when you have completed the form.
  - vii. Confirm the two new rows in the Document Processing Queue.
  - viii. Start the document processor.
  - ix. Confirm successful receipt of the email and fax.
- f. **Stop the document processor** when current batch of test have been sent.



*This is to protect against sending future test documents to customers or vendors.*

- g. Allow users back on the system (if desired).

3.11. Review BUI Application information in Enterprise Manager, if applicable, to ensure that BUI launch configurations for the MDI/Application as a whole, or for any individual tasks, are present and correct for both "Old" and "New" instances.

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## Section 4: Go Live - Refresh Data

Once you've verified the installation to your satisfaction, refresh your data for the go-live event. Use the steps listed in the [Data Refresh: Details](#) section to prepare for go-live.

The [Overview](#) is provided only as a general description of the process.

### Data Refresh: Overview

- 4.1. [Log users out of "New" Addon.](#)
- 4.2. [Delete test data.](#)
- 4.3. [Initialize data for production.](#)
- 4.4. [Optionally, preserve name of production database.](#)
- 4.5. [Refresh Barista Administrative data.](#)
- 4.6. [Clear document archive.](#)
- 4.7. [Prepare the Document Processing Queue if used.](#)
- 4.8. [Review BUI Application information.](#)
- 4.9. [Address Trigger Considerations.](#)
- 4.10. [Grant access](#) to the "New" system.

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## Data Refresh: Details

- 4.1. Log users out of “New” Addon.
- 4.2. Delete **test** data.

### WARNING

Be careful to **NOT** delete live production data. This step is for **test** data only.

- a. If using a hybrid application (i.e. Payroll), confirm that you have backed out any non-permanent changes to the legacy data per [the hybrid payroll step](#) in the Testing Details section.
  - b. Delete files from the version-specific test data directory (e.g. /<new>/aon/testdata/).
- 4.3. Initialize data for production.
- a. Edit the +xxDATA SYSSTBL and SYSCFG entries in `addon.syn` to point to the version-neutral production data directory.
    - +DIR\_DAT
    - +ADDDATA
    - +APDATA
    - +ARDATA
    - +BMDATA
    - +CRDATA
    - +GLDATA
    - +IVDATA
    - +MPDATA
    - +OPDATA
    - +PODATA
    - +PRDATA
    - +SADATA
    - +SFDATA
    - +SYDATA
  - b. **For minor revision upgrades**, log everyone off of the “Old” instance.
  - c. **For major revision upgrades**, or the unusual case of minor revision upgrades that have structural file changes, follow these steps to re-execute the EM *Update Wizard* to refresh the data in the “New” install with production data:



See the *AddonSoftware Readme* for the version you are upgrading to for information on whether the release has structural file changes. Readme files are found at [www.basis.com/readme-bbj](http://www.basis.com/readme-bbj).

- i. Log into Enterprise Manager as `admin`.
- ii. Double-click ‘Databases’ in the Databases/SQL node of the EM Navigator pane.
- iii. Single-click on the “Old” database to select it from the databases listed in the grid on the [Databases/SQL] tab.
- iv. Click [Update Wizard] at the top right of the [Databases/SQL] tab.
- v. Click [Next] on the ‘Welcome’ panel.

- vi. On the 'Data Dictionary and Data File Information' panel:
  1. For the 'New Database Name' field, leave it blank.
  2. For the 'New Data Dictionary' field, key in or browse to the location of the "New" dictionary (i.e. /<new>/barista/bbdict/).
  3. For the 'Updated Files Destination' field, key in or browse to the location of the [version-neutral production data directory](#) for the "New" install (e.g. /<aon\_prod>/vNN/data/) per [Figure 2](#).

**WARNING**

Do **NOT** mark the 'Copy Only Changed Table Data Files' checkbox.

- 4. Click [Next].
- vii. Click [Next] on the 'Specify User Property Destinations' panel.



*A few minutes will elapse while the Wizard processes.*

- viii. Click [Next] on the following series of panels.
- ix. Click [Finish] on the final panel.
- x. Double-click 'Online Copy Jobs' in the File System node of the EM Navigator.
- xi. Monitor the progress of the Online Copy Job from Enterprise Manager--using the Refresh button to view the progress.
- xii. When the *Update Wizard's* copy job reaches 100%:
  1. **Log everyone off of the "Old" instance.**
  2. Click [Refresh].
  3. **Expand the list of files and write down the names of any files with errors, as files with errors are not copied.**



See the [Symptom: Error reported by EM Online Copy Jobs utility during EM Update Wizard process](#) topic in the *Installation and Upgrade Reference guide* for tips on addressing errors.

- xiii. Click the copy job name to select it.
- xiv. Click [Finish].
- xv. Resolve any errors.
- xvi. Complete the auto-launch tasks.
  1. Copy the adx\_conversionCtrl file (not the .ini one) from config to the production data directory.
  2. Open the adx\_conversionCtrl file in the production data directory with a

text editor, and as necessary, edit the "data\_source" line to read "data\_source=AIUW".

3. Launch the "New" instance.
  4. Allow the auto-launch tasks to complete. The auto-launch tasks that execute at this point include "Create SPROCs," "Distribute EM Update Wizard Files," and "Initialize Addon Data," the latter for version-specific conversions. For the "Distribute EM Update Wizard Files" task, supply
    - [Updated Files Location](#): enter or browse to the location of the production data directory.
    - [New Database Name](#): enter the database name as provided when initializing the *Upgrade Wizard*.
- 4.4. (Optional) To preserve the name of the current production database, follow the steps detailed in the [Preserving Production Database Name When Upgrading](#) topic of the *AddonSoftware Installation and Upgrade Reference*.
- 4.5. Refresh Barista Administrative data.
- a. Confirm that all users other than the VAR/admin performing the upgrade are logged out of all Addon instances per previous steps.
  - b. Run Barista's [Create Sync File Backup](#) utility on <old> system.
  - c. Protect the <old> data dictionary from accidental access using one of these methods:

**Method 1**

- i. Rename <old> data directory.

**Method 2**

- i. Log in to the "Old" Addon instance so that you will have sole access after the lockout in the following step.
- ii. Lock users out of the "Old" Addon system by doing the following outside of Addon (OS level):
  1. Create a text file named `app_maint_msg.txt`.



*The first line of text is displayed in the system lockout message dialog title bar, and all other text is displayed in the message body.*

2. Place `app_maint_msg.txt` in the `/<old>/barista/` directory.



*This will prevent users from logging into the "Old" system until the file is removed.*

- d. Remove shortcuts to the <old> application(s).



- e. Re-run Addon's utility to [Update sync XML Files](#) to <new> install location. In addition to running this utility for Addon, it also needs to be run separately for each installed vertical application <vert\_app> project.
  - f. Re-run *Auto-Synchronize Barista* utility in the "New" instance.
- 4.6. Clear the document archive.

**WARNING**

Do **NOT** delete <old> IMAGES or <old> DOCUMENTS if used by <new> system.

- a. If you **did** [create a separate document directory for testing](#), do the following:
    - i. Edit the +DOC\_DIR\* STBLs in the `addon.syn` file to point to the version-neutral document location, `/<aon_prod>/documents/` (see [Figure 2](#)).
      - +DOC\_DIR\_PDF
      - +DOC\_DIR\_TXT
      - +DOC\_DIR\_HTM
      - +DOC\_DIR\_XLS
      - +DOC\_DIR\_XML
      - +DOC\_DIR\_DEFAULT
      - +DOC\_DIR\_CSV
      - +DOC\_DIR\_ARCHIVE
    - ii. Run *Auto-Synchronize Barista* utility in the "New" instance.
    - iii. Delete the physical test documents.
  - b. If you **did not** [create a separate document directory for testing](#), delete **test** documents and sub-directories from the version-neutral document location, `/<aon_prod>/documents/` (see [Figure 2](#)).
- 4.7. If sending faxes or emails, prepare the [Document Processing Queue](#).
- a. Clear the document queue by canceling any documents.
  - b. Stop the Document Processing Queue for the `/<old>/aon` instance.
  - c. Start the Document Processor for the `/<new>/aon` instance either from within Barista or as an AutoRun task in Enterprise Manager.
- 4.8. Review BUI Application information in Enterprise Manager, if applicable, to ensure that BUI launch configurations for the MDI/Application as a whole, or for any individual tasks, are present and correct for both "Old" and "New" instances.
- 4.9. If triggers are used with code being upgraded, then the trigger definitions will likely need to be updated using BASIS's Enterprise Manager (EM). In addition, any references to test paths within trigger source code may need to be updated. If trigger definition or source files are modified, ensure the changes aren't overwritten by subsequent file copies and/or rsyncs. See [How to Set Up a Hybrid Environment](#) and [Using Triggers for Hybrid Installations](#) for information on triggers.



*The specifics of the steps here are based on the Eclipse version of EM, but are generalizable.*

- a. Copy \*.trigger definition and src files to the [legacy production](#) data directory, if they

don't already exist there, and copy \*.trigger definition and src files to the "New" AddonSoftware *production* data directory as specified in [Using Triggers for Hybrid Installations](#).

- b. Edit trigger definitions in Enterprise Manager.
  - i. Log into EM as `admin`.
  - ii. Double-click 'Triggers' in the File System node of the EM Navigator pane.
  - iii. Add a Mounted Directory entry for the new *legacy production* data file location where the \*.trigger files are located
    1. Single-click on the 'Mounted Directories' node on the [Triggers] tab.
    2. Click the green plus sign in the upper right of that tab.
    3. Browse to the new *legacy production* data file location that you created in the [Protect legacy production data](#) step.
  - iv. **Mounted Directories:** For each trigger file listed in the "Files With Triggers" pane, it may be necessary to update the configuration data.
    1. Select the newly-mounted directory from the "Mounted Directories" list.
    2. Double-click each file in the "Files With Triggers" panel to bring up a configuration tab.
    3. Under the General Trigger Settings node, update the 'Config File' and 'Working Directory' entries for the new installation. For example:
      - o Config File:  
`<new>/barista/sys/config/enu/barista.cfg`
      - o Working Directory: `<new>/barista/`
  - v. **Databases:** For each trigger file listed in the "Tables With Triggers" pane, it may be necessary to update the Working Directory and Config File.
    1. Select the "New" database from the "Databases" list.
    2. Double-click each file in the "Files With Triggers" panel to bring up a configuration tab.
    3. Under the General Trigger Settings node, update the 'Config File' and 'Working Directory' entries for the new installation. For example:
      - o Config File:  
`<new>/barista/sys/config/enu/barista.cfg`
      - o Working Directory: `<new>/barista/`

4.10. Grant access to the "New" system which is now ready for production use.

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