

■ ProcessRobot Upgrade Guide

Enterprise Robotic Process Automation 2019





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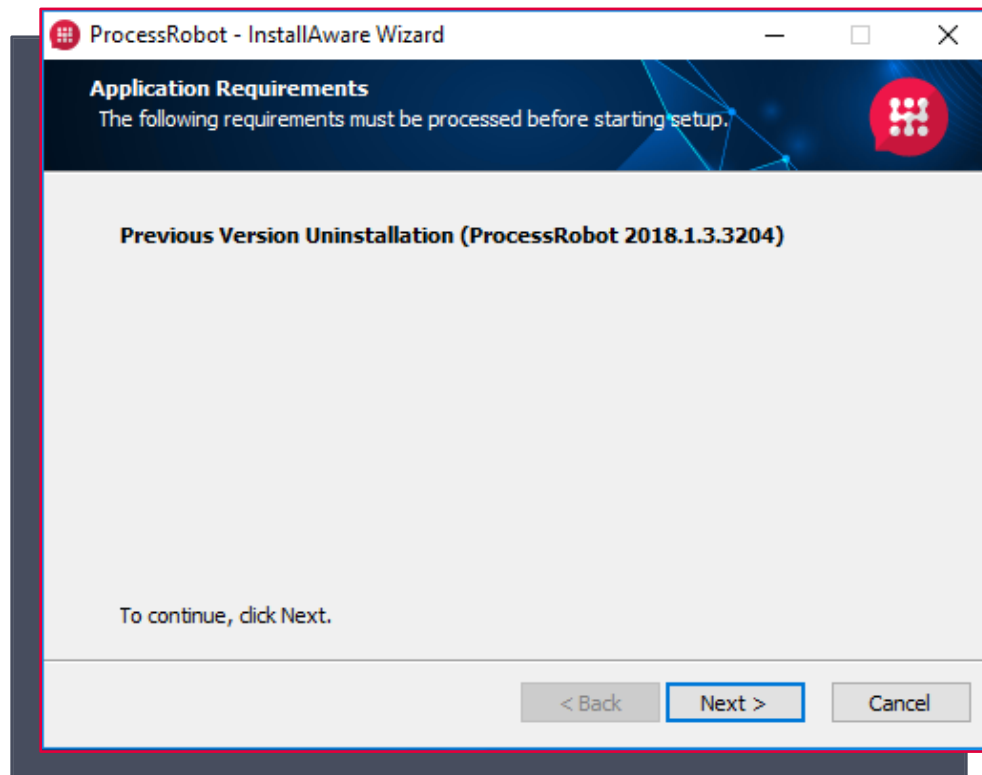


Upgrading ProcessRobot

Step 1: Upgrading ProcessRobot to the latest Version

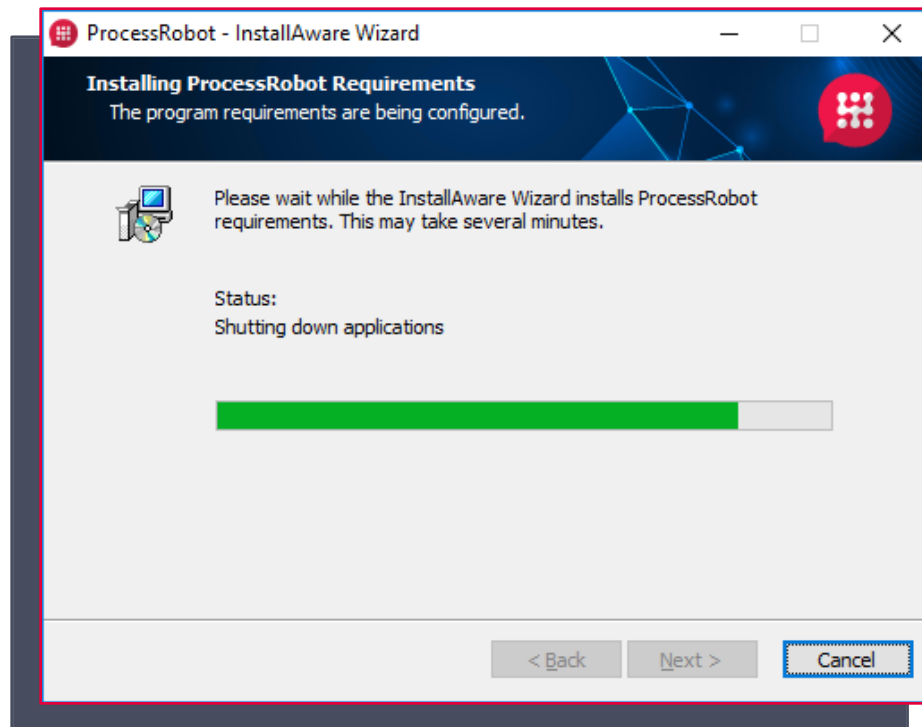
Start the upgrading process by double clicking on the “ProcessRobotServerSetup-201x.x.xxxx.exe” file (make sure that you are running it as an administrator).

Firstly, you will be prompted to uninstall the previous ProcessRobot version.

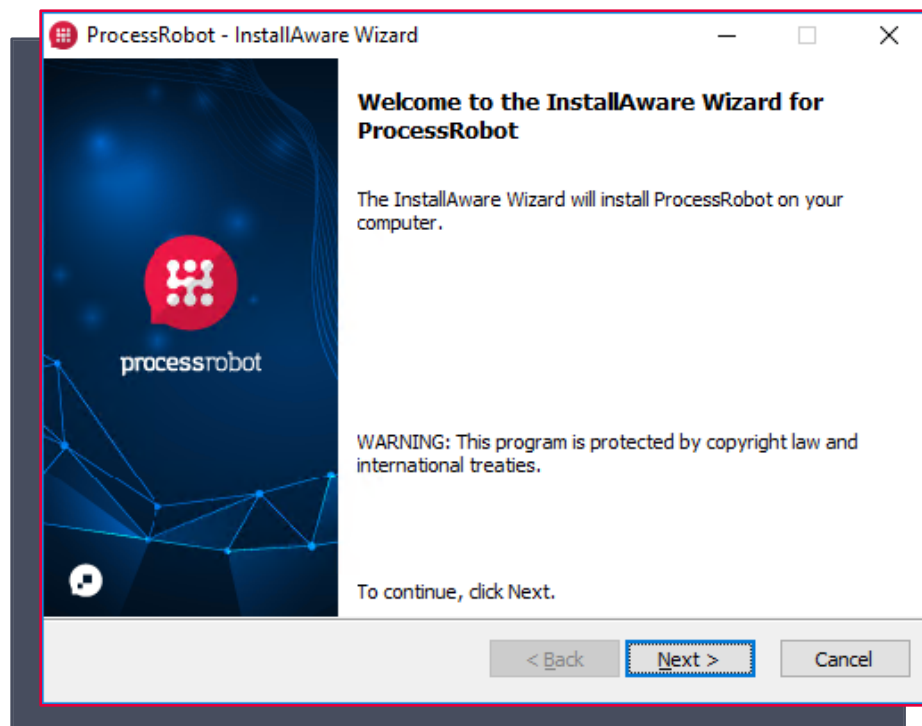




After this is done, the installation wizard will begin by setting up some requirements for ProcessRobot.



Click 'Next' to proceed with the installation.

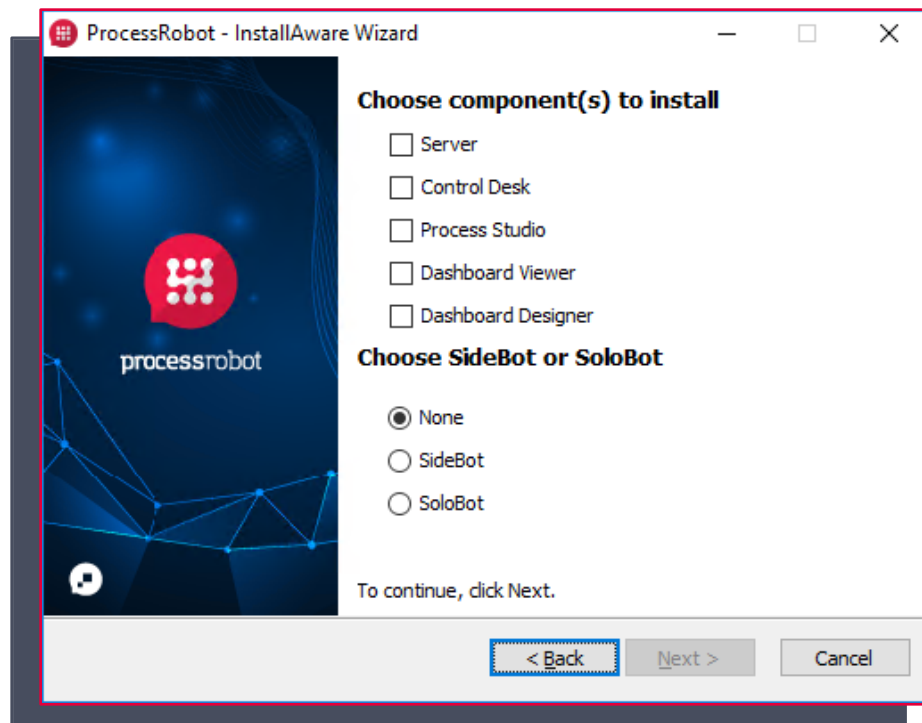




Accepting the terms of the license agreement is necessary to proceed.

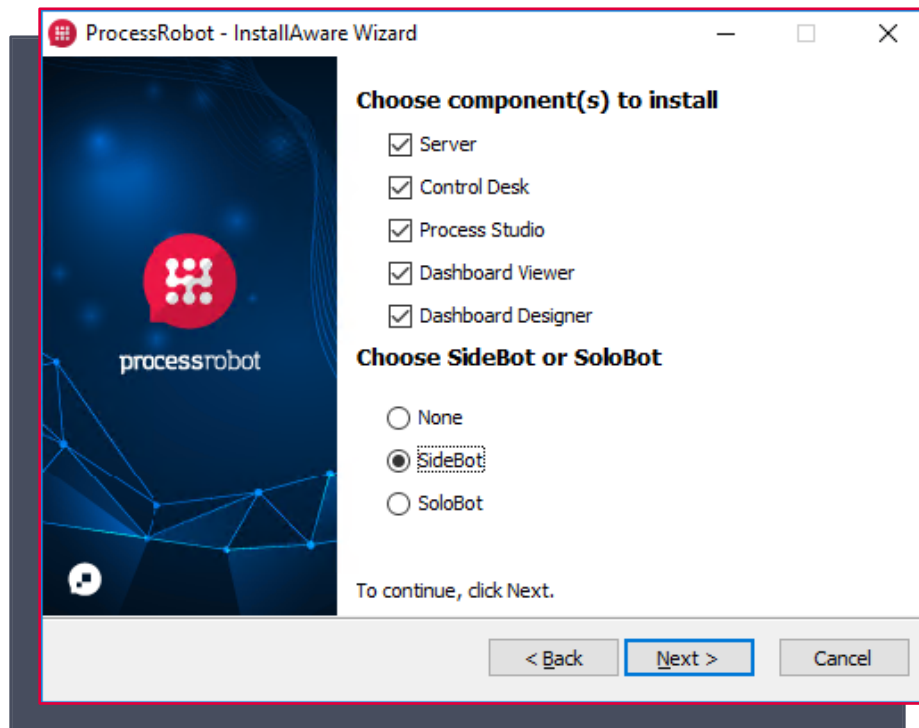


Choose which components to install:

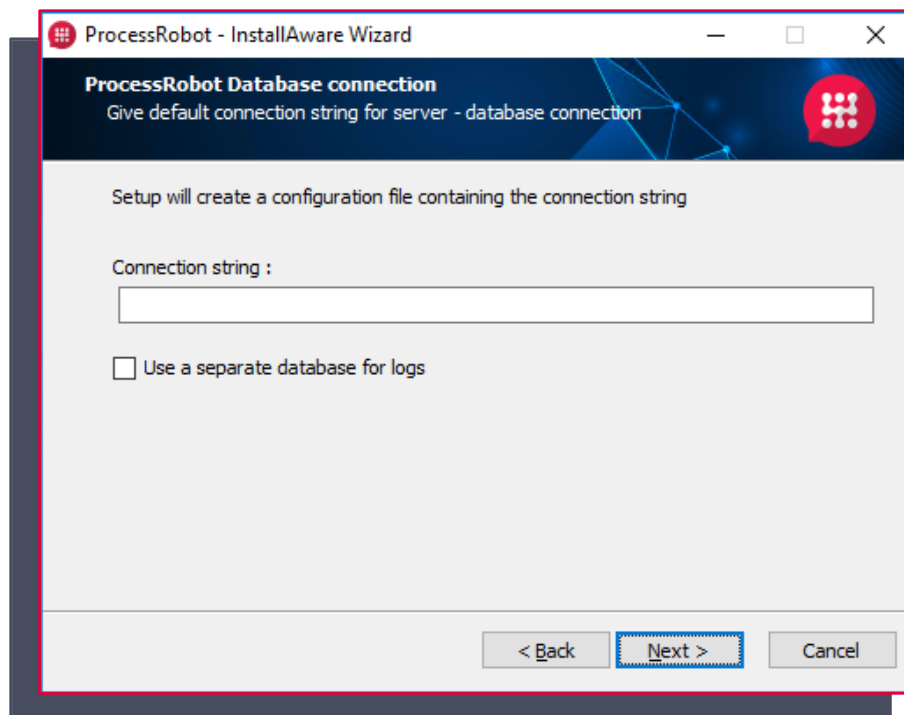




For example, in this Server installation, also include all Client Tools plus a SideBot:



Enter the Connection String for the existing SQL Server database to be used for ProcessRobot. Optionally select if a second database should be used for Logs. If this option is not selected, Logs will be stored in the same database as the other ProcessRobot data.





Enter the Connection String in the format:

Password=<password>; Persist Security Info=True; User ID=<dbUserName>; Initial Catalog=<dbName>;
Data Source=<serverName\SQLEXPRESS>;

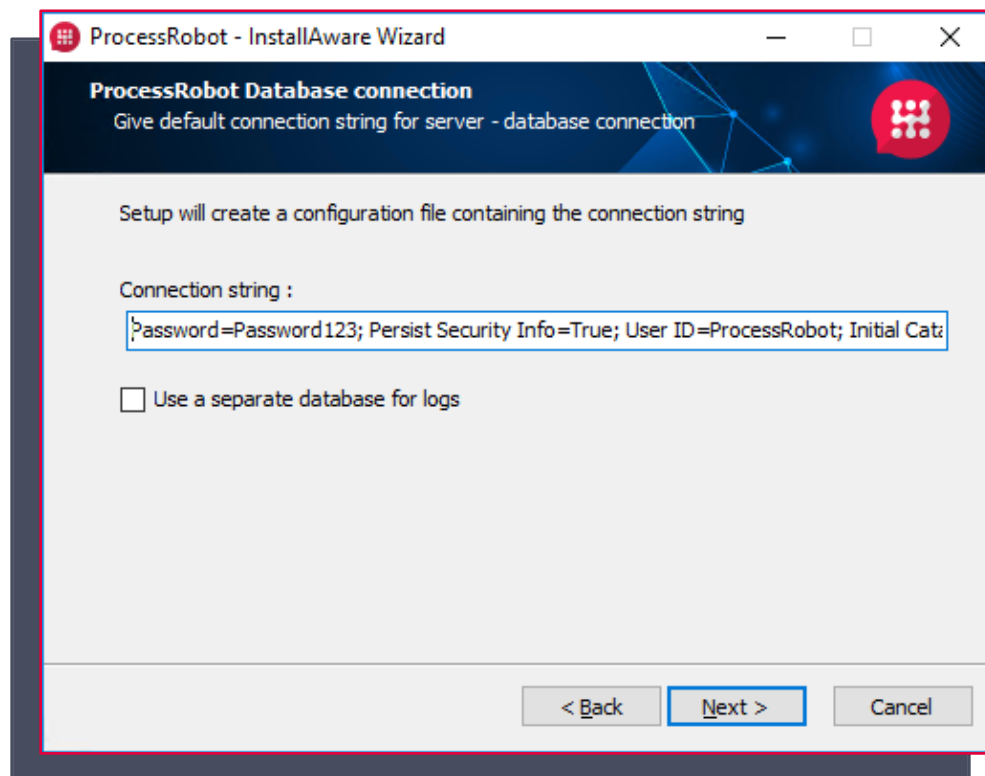
Where:

<password> is the database user's password

<dbUserName> is the database user name

<dbName> is the name of the database to be used for ProcessRobot

<serverName\SQLEXPRESS>: serverName is the name of the Server machine, and SQLEXPRESS is the correct instance of SQL Server. By default, this should be SQLEXPRESS, but if multiple instances of SQL Server exist on the machine, the instance may have a different name, eg SQLEXPRESS01.





When selecting to use a separate database for Logs, a second connection must be entered.

ProcessRobot - InstallAware Wizard

ProcessRobot Database connection
Give default connection string for server - database connection

Setup will create a configuration file containing the connection string

Connection string :
Password=Password123; Persist Security Info=True; User ID=ProcessRobot; Initial Cat

☒ Use a separate database for logs

Logs connection string :
Password=Password123; Persist Security Info=True; User ID=ProcessRobot; Initial Cat

< Back Next > Cancel

Select whether to install the Softomotive Browser Extensions for Chrome and Firefox. These are necessary for allowing ProcessRobot to perform web automation tasks on those browsers. Both Extensions are recommended.

ProcessRobot - InstallAware Wizard

Web Browser Extensions

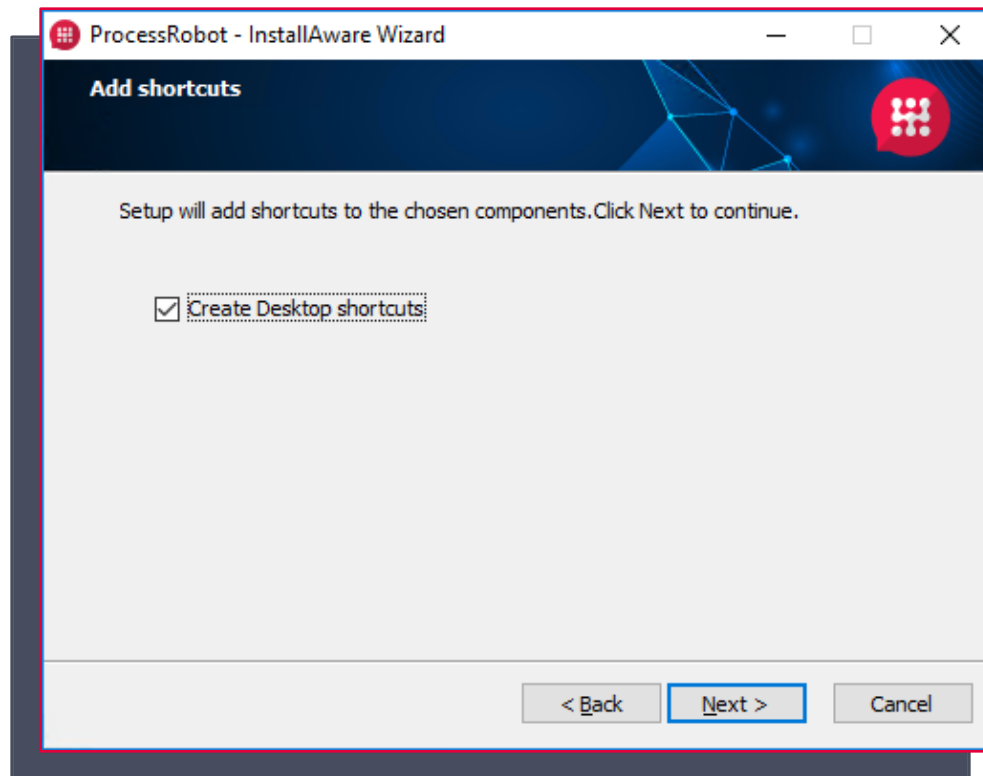
Select the Web Browser Extensions you wish to install. Click Next to continue.

☒ Mozilla Firefox
☒ Google Chrome

< Back Next > Cancel



Choose whether to create Desktop shortcuts for the Client Tools / Robot.





Enter the IP address, host name or Fully Qualified Domain Name (FQDN) of the Server machine and the port number.

The number entered should correspond to a port that is not currently in use, and which complies with ITSEC and IANA (<https://www.iana.org/assignments/service-names-port-numbers/service-names-port-numbers.xhtml>).

A quick way to see which ports are currently in use is to run the following command as an Administrator in the Command Prompt:

```
netstat -a -b
```

As an example, this guide will use port number 6090.

The screenshot shows a Windows-style window titled "ProcessRobot - InstallAware Wizard". The main heading is "ProcessRobot Server Address" with the subtitle "Give default server address". Below this, a message states: "Setup will create a configuration file containing the server's IP address and port". There are two input fields: "Address" and "Port". The "Address" field is empty, and the "Port" field contains a vertical cursor. At the bottom right, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".



In cases where the ProcessRobot Server and Client machines belong to the same Active Directory domain, the host name should suffice.

ProcessRobot - InstallAware Wizard

ProcessRobot Server Address
Give default server address

Setup will create a configuration file containing the server's IP address and port

Address
PR-SERVER

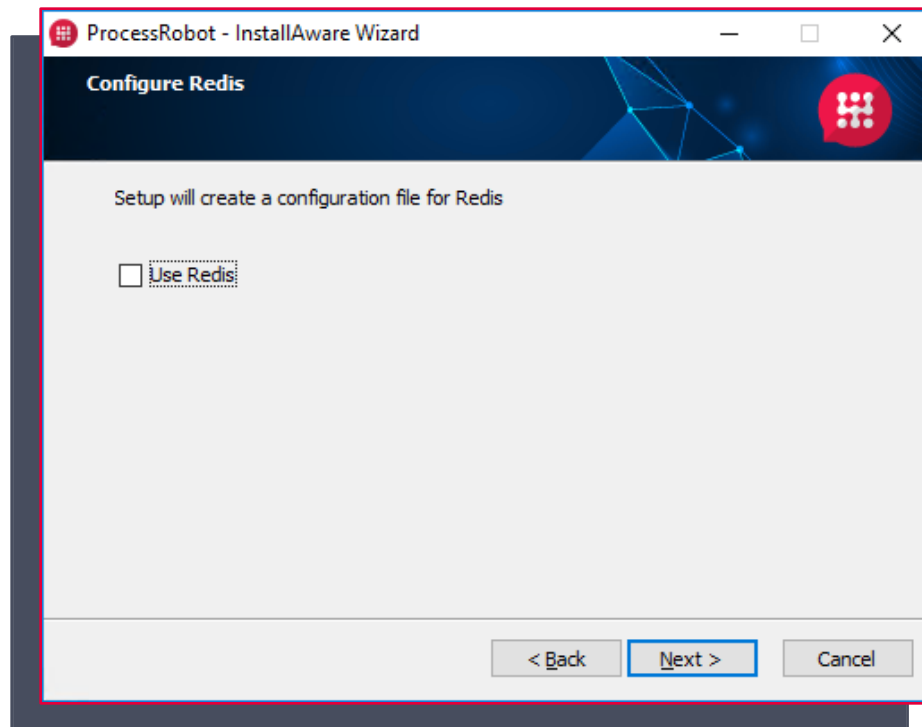
Port
6090

< Back Next > Cancel

Note that if there are issues with the DNS, the other ProcessRobot components will not be able to communicate with the Server using only the host name or FQDN. DNS issues can be identified by pinging the host name or FQDN. In such cases, either the Server's IP address must be used instead, or the DNS issues must be resolved.

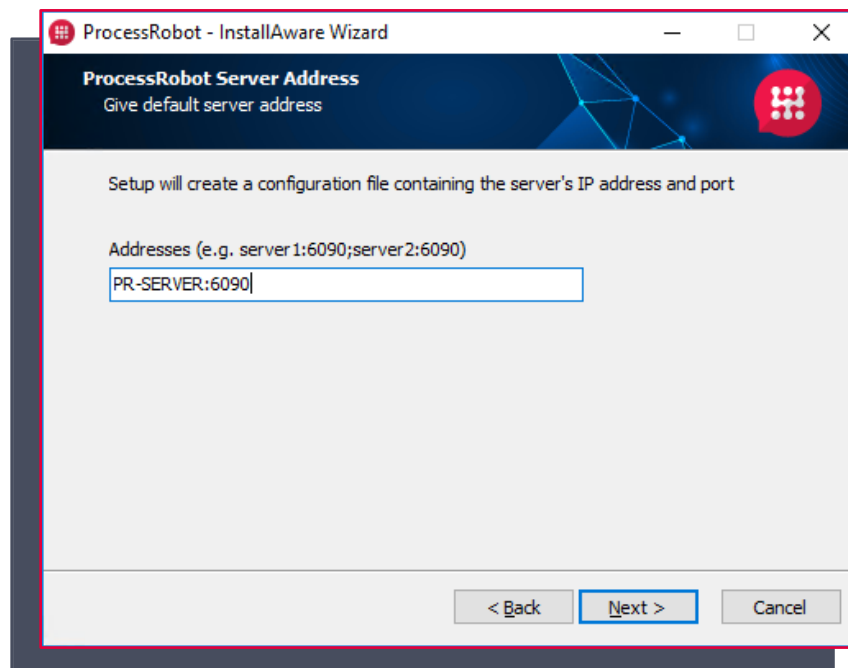


Select whether to use a Redis deployment. This guide will proceed without enabling this option.



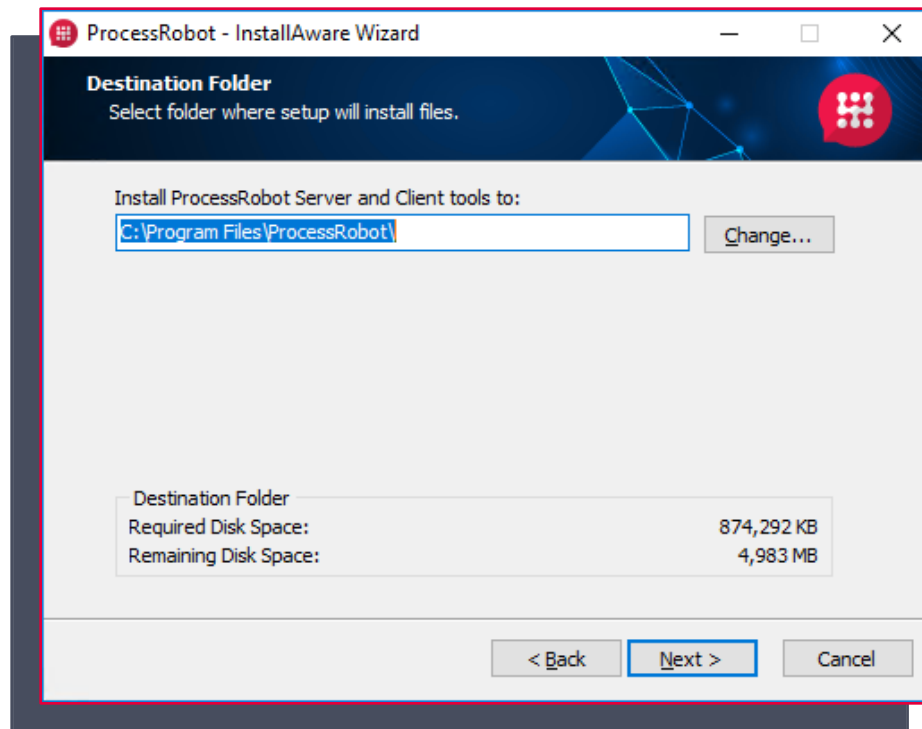
When Client Tools or a Robot are installed, it is necessary to also enter the Server address and port number previously entered in the format <server>:<port>. The <server> value can be entered in any of the three ways described previously, for example:

- 10.1.182.106:6090 (IP address)
- PR-SERVER:6090 (host name)
- PR-SERVER.processrobot.com:6090 (FQDN)

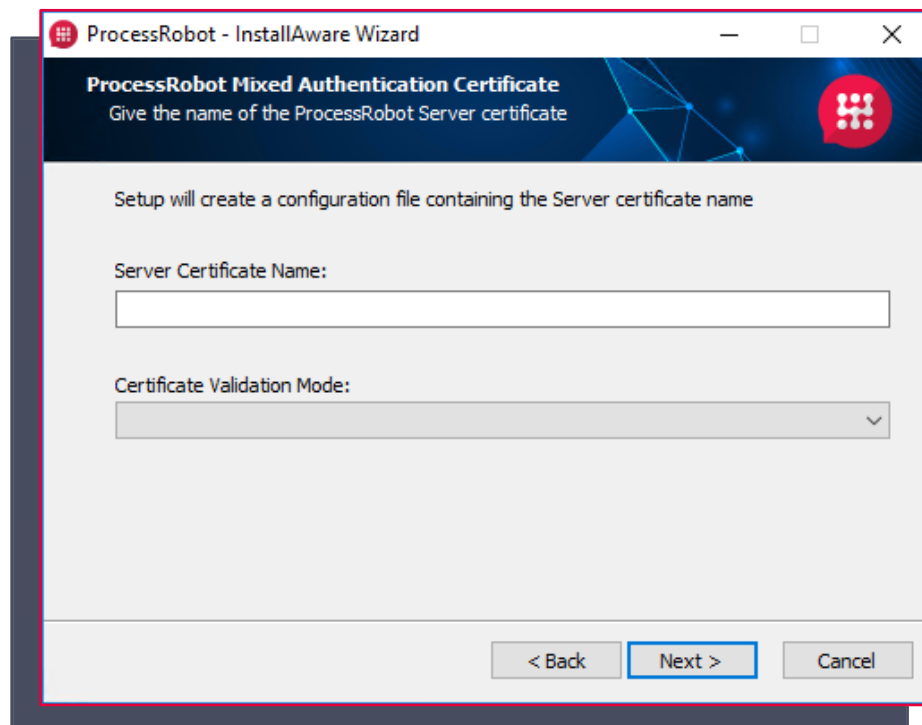




Select the destination file path for the ProcessRobot installation. The default location is: C:\Program Files\ProcessRobot.



Optionally enter a Certificate Name to use for ProcessRobot Custom Authentication. The Certificate must already be set up on the Server machine. Setting up Certificates, as well as enabling Custom Authentication, will be covered later in this guide.





Once the Certificate Name has been entered, there are several Certificate Validation Modes to choose from. For Self-Signed Certificates, choose “None”.

For Production grade deployments, the Mode will likely be different. In order to learn more about the Certificate validation modes and decide which one fits your environment, please visit:

<https://docs.microsoft.com/en-us/dotnet/api/system.servicemodel.security.x509certificatevalidationmode?view=netframework-4.8>

ProcessRobot - InstallAware Wizard

ProcessRobot Mixed Authentication Certificate
Give the name of the ProcessRobot Server certificate

Setup will create a configuration file containing the Server certificate name

Server Certificate Name:
AKADDC.processrobot.demo

Certificate Validation Mode:
None
PeerTrust
Chain Trust
Peer Or Chain Trust

< Back Next > Cancel

ProcessRobot - InstallAware Wizard

ProcessRobot Mixed Authentication Certificate
Give the name of the ProcessRobot Server certificate

Setup will create a configuration file containing the Server certificate name

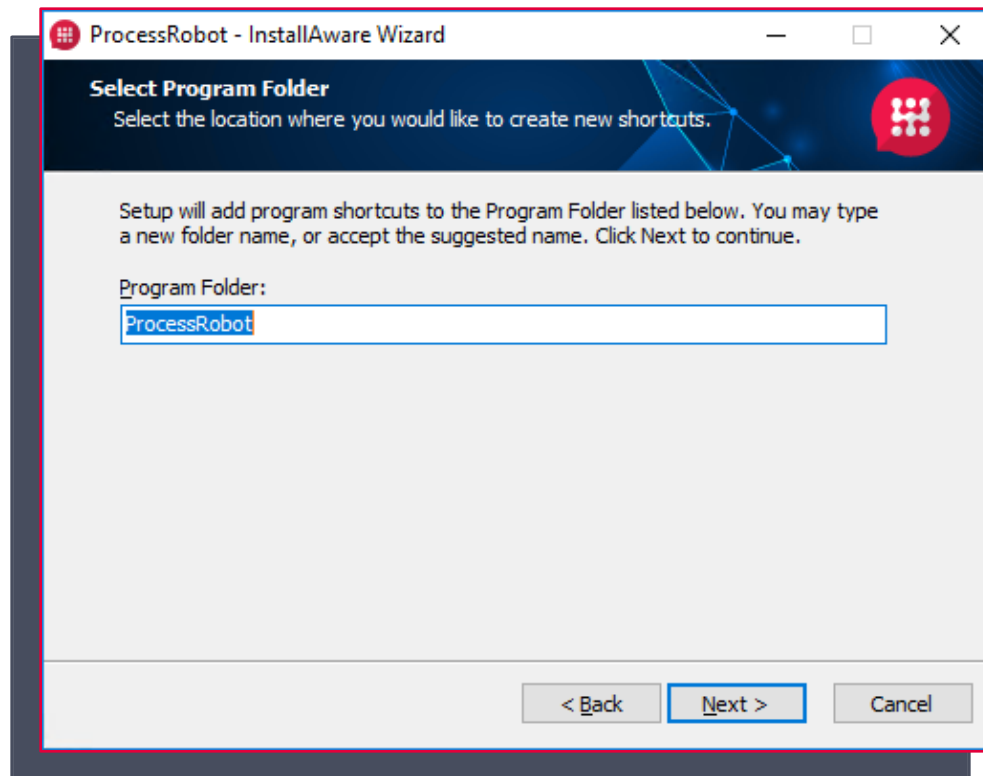
Server Certificate Name:
AKADDC.processrobot.demo

Certificate Validation Mode:
None
PeerTrust
Chain Trust
Peer Or Chain Trust

< Back Next > Cancel

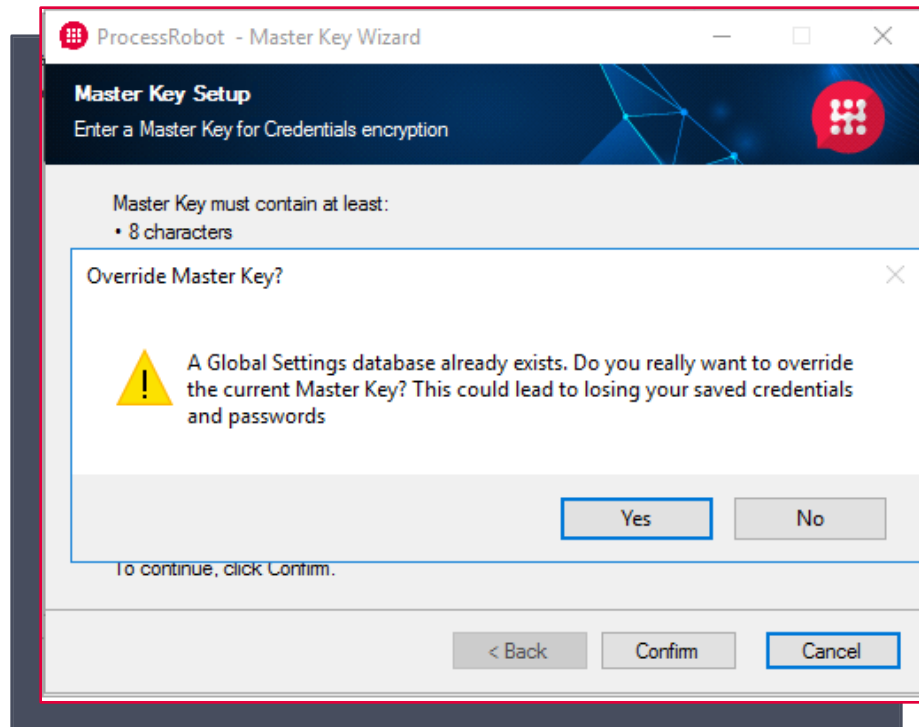


Set the Program Folder name.

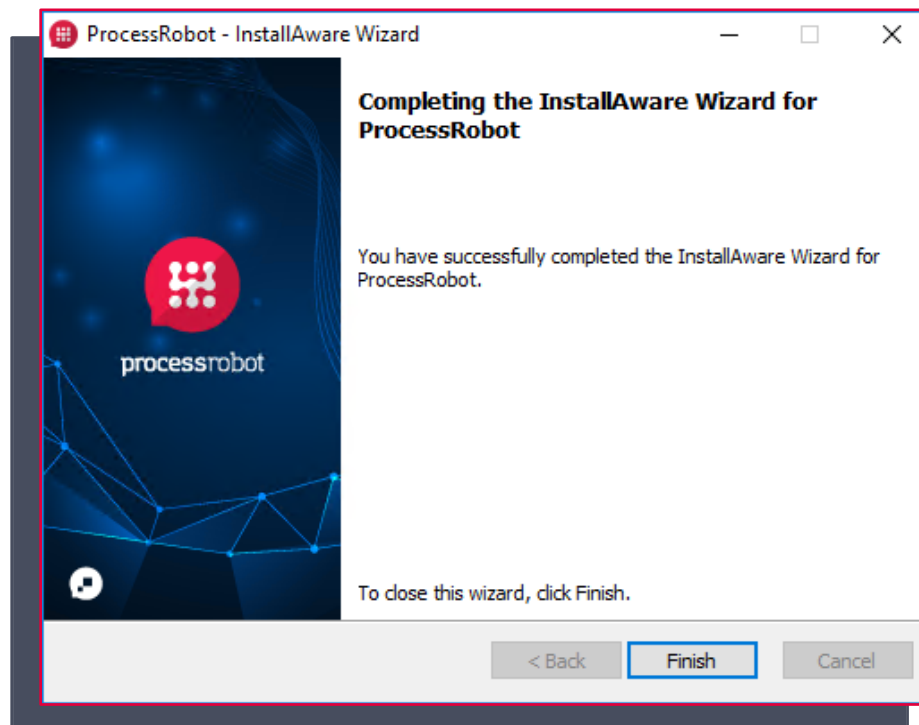




At this stage, you will be prompted to override an already existing Global Settings database. Since our purpose is to simply upgrade to the latest Version, we will select “No” in this case.



Click “Finish” to exit the ProcessRobot installer.

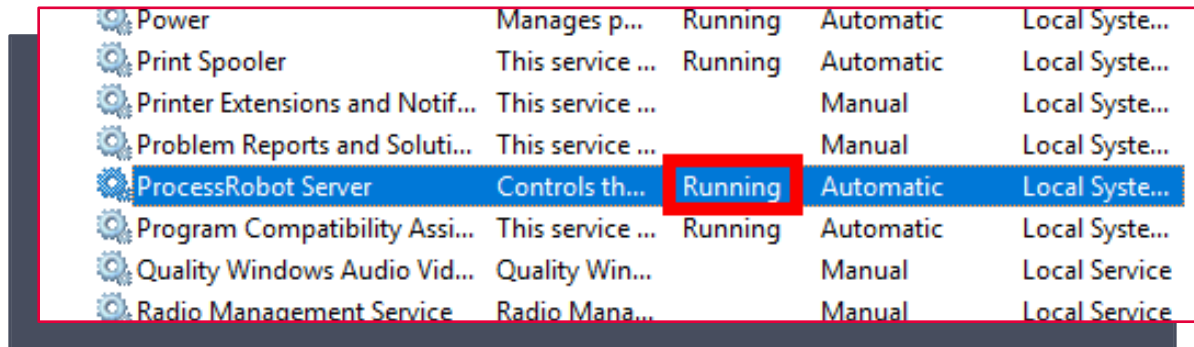




Once the installation is finished, in case the "ProcessRobot Server" service does not start, navigate to the installation folder (usually to C:\Program Files\ProcessRobot\Server) and execute the file ProcessRobotDatabaseUpgrader.exe. This will setup the ProcessRobot database automatically so that the service will start.

To verify that everything went well, check if the ProcessRobot service is up and running. To do so, open the Windows Task Manager. Under the "Services" tab, find the ProcessRobot Server service.

Allow the ProcessRobot Server to communicate through the firewall by either allowing the Port # or the



ProcessRobot.Server.exe.

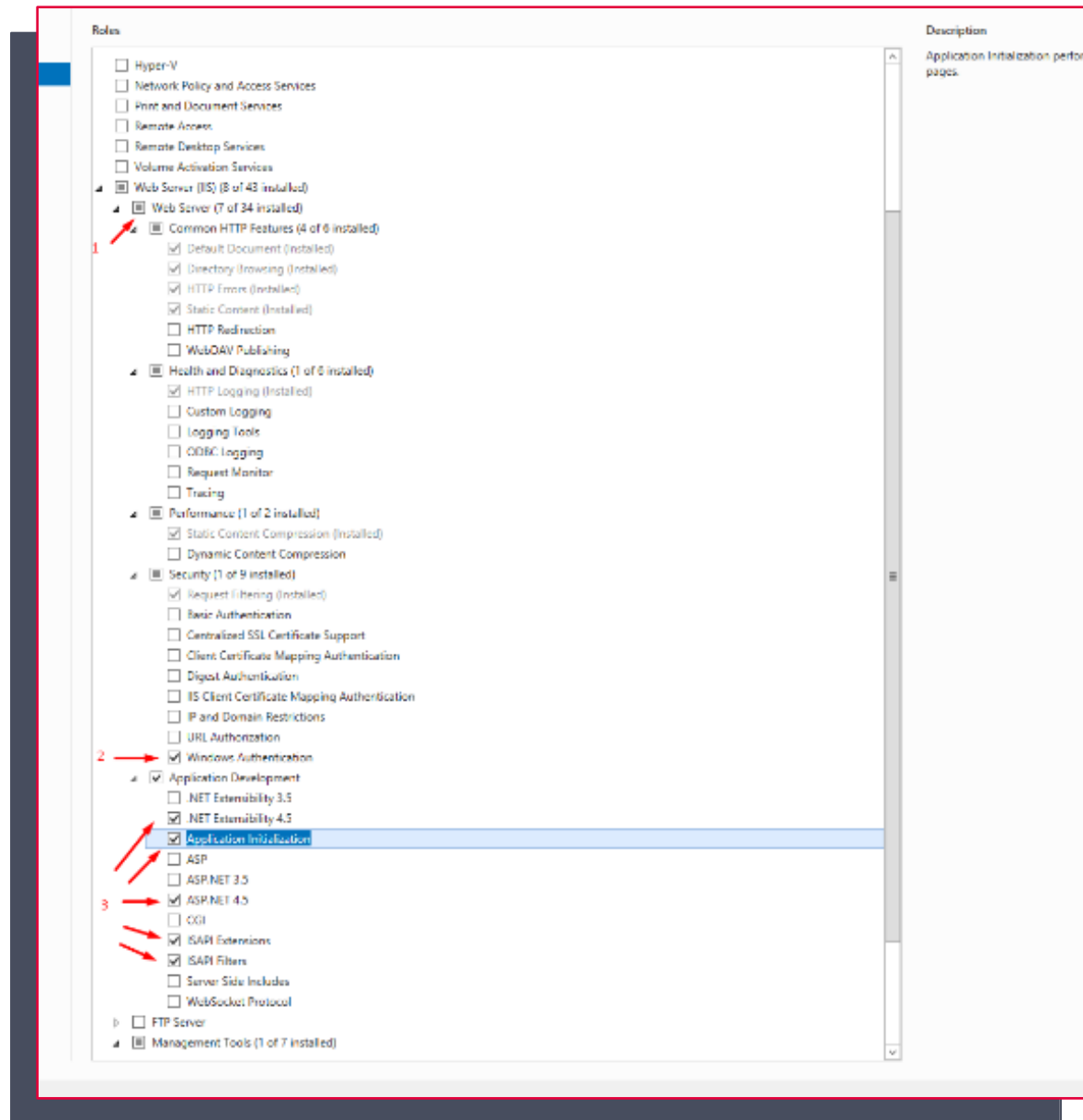
Keep in mind that this procedure will have to be repeated in every machine where an upgrade is required.



Step 2: Upgrading the Web Console

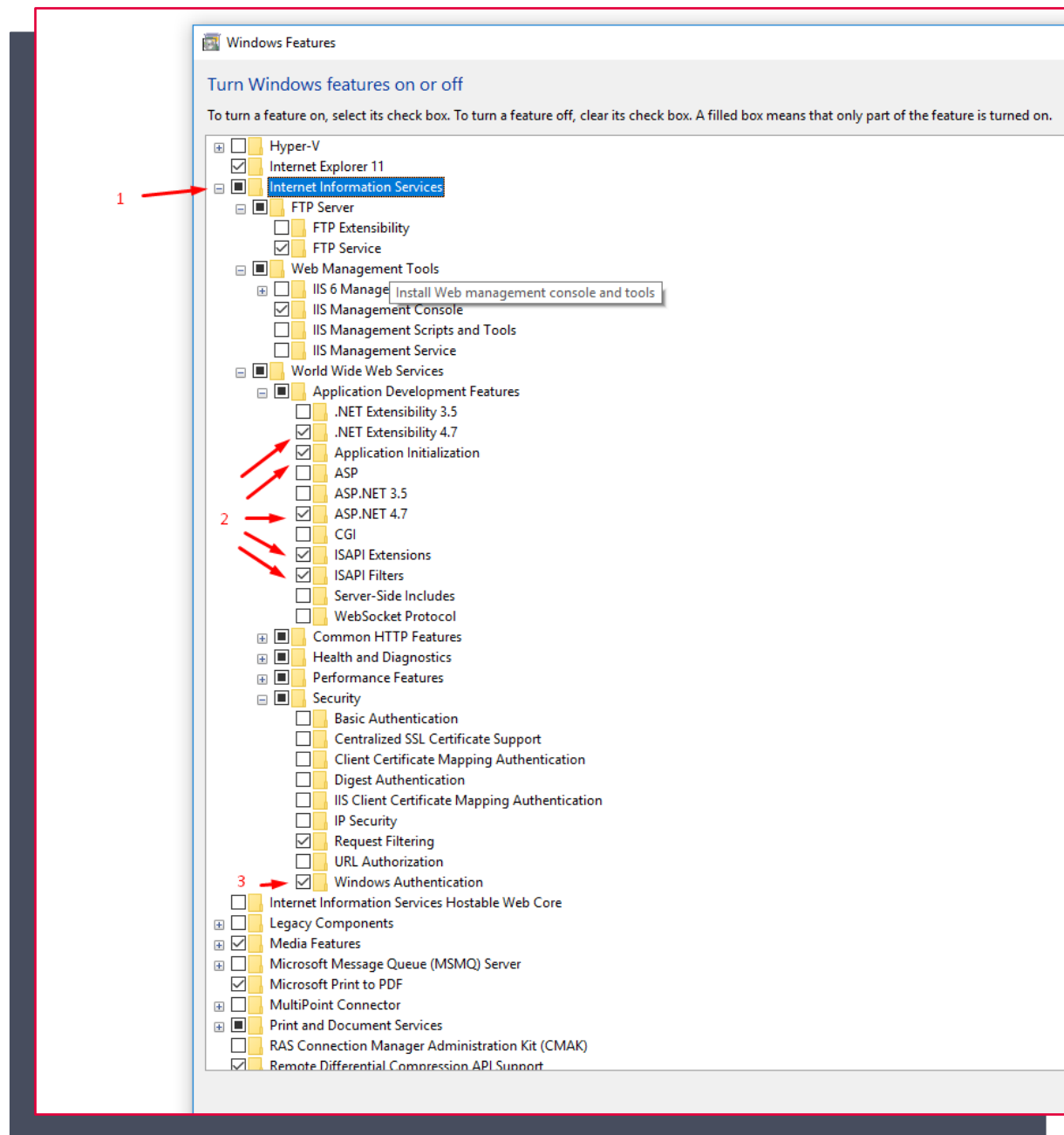
Keep in mind the prerequisites for the Web Console Installation which are the following:

If the machine is a Windows Server, then in the “Windows Features” window, go to “Add Roles and Features Wizard” → “Features” and enable the options below:





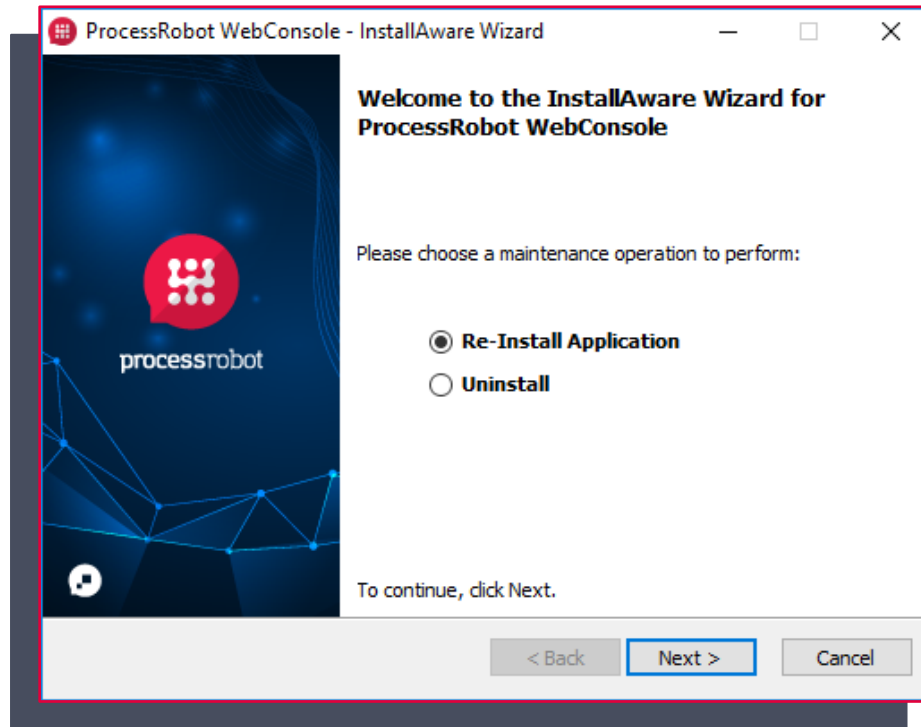
If the machine is a Windows Client then open the “Turn Windows Features on or off” window and enable the features shown below:



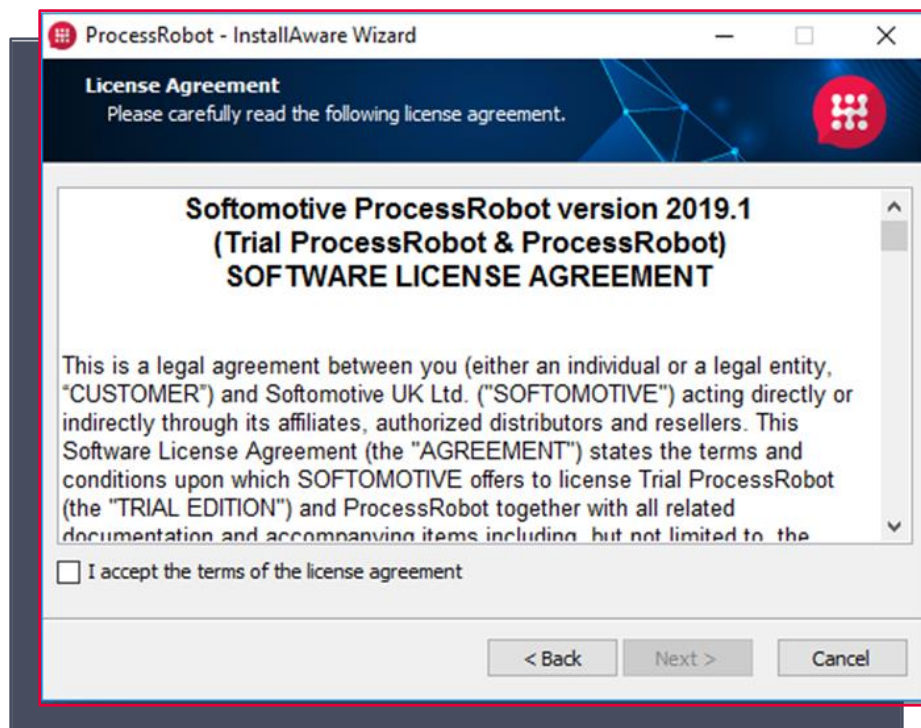
All these settings must already be in place, as long as you have used the Web Console already and now you are just upgrading it.



1. Run the “ProcessRobotWebConsoleSetup-201x.x.xxxx.exe” Installer to begin the upgrade and select Re-Install Application



2. Read the license agreement carefully





3. Enter the info of the machine that hosts the ProcessRobot Server. You can enter either it's Host Name, FDQN, or IP address.

The screenshot shows the 'ProcessRobot Server Address' screen of the 'ProcessRobot WebConsole - InstallAware Wizard'. The title bar reads 'ProcessRobot WebConsole - InstallAware Wizard'. The header area has a dark blue background with the ProcessRobot logo on the right. Below the header, the text 'ProcessRobot Server Address' is followed by 'Give default server address'. A message states: 'Setup will create a configuration file containing the server's IP address and port'. There are two input fields: 'Address' with the value 'roboserver.softomotive.demo' and 'Port' with the value '6090'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

4. Choose the installation destination

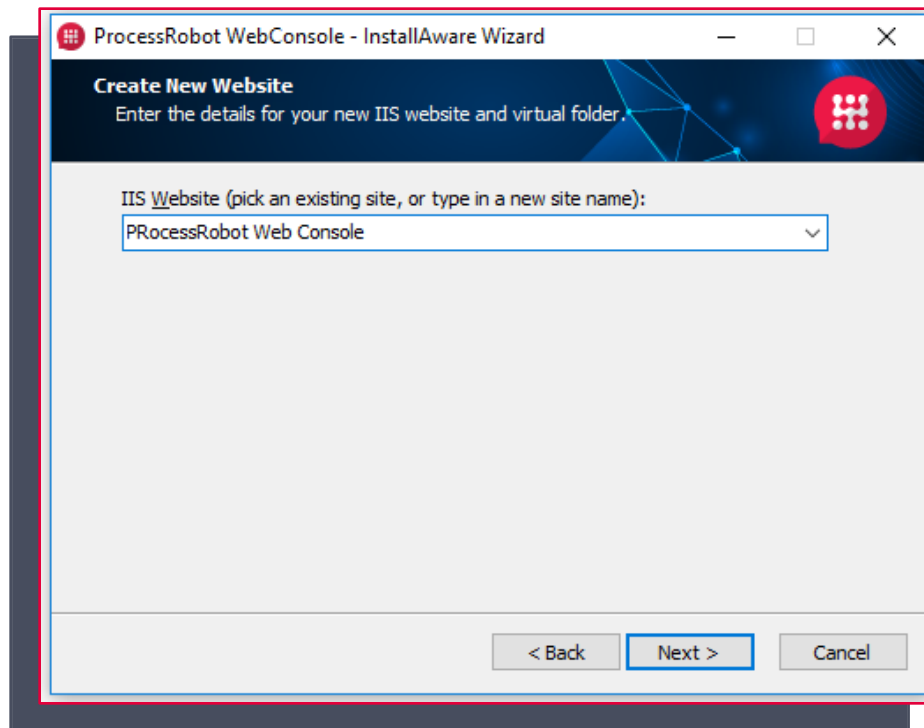
The screenshot shows the 'Destination Folder' screen of the 'ProcessRobot WebConsole - InstallAware Wizard'. The title bar reads 'ProcessRobot WebConsole - InstallAware Wizard'. The header area has a dark blue background with the ProcessRobot logo on the right. Below the header, the text 'Destination Folder' is followed by 'Select folder where setup will install files.'. A message states: 'Install ProcessRobot WebConsole to:'. There is an input field containing the path 'C:\inetpub\wwwroot\ProcessRobot WebConsole' and a 'Change...' button. At the bottom, there is a table showing disk space requirements:

Destination Folder	
Required Disk Space:	244,011 KB
Remaining Disk Space:	37,211 MB

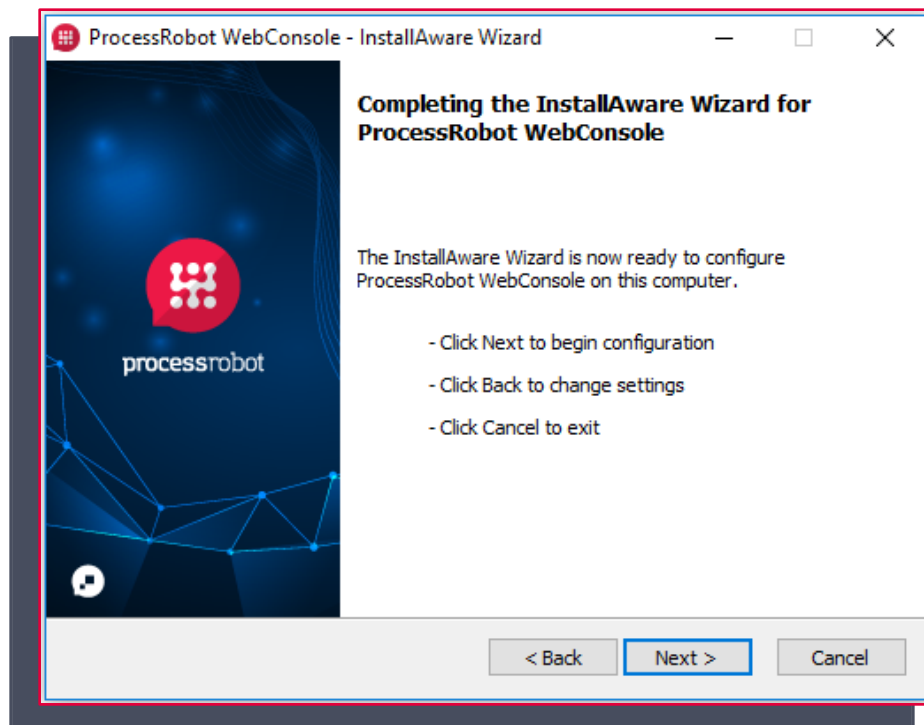
At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.



5. Select the IIS Website



6. Press next to begin the installation





FAQ

1. Do I have to go through the installation on each and every machine that was hosting a ProcessRobot Component?

Yes.

2. Do I need to upgrade my license, when installing a new ProcessRobot Version? ProcessRobot versions are represented as follows:

A.B.C.D like **2018.1.2.3251**

In every change of A or B, you will need a new license.

In every change of C or D, you will not need a new license.

Contact Softomotive in order to be provided with your new license, if you need one.

3. Do I have to take a backup of my database upon upgrading?

Apart from your own backup schedule on the machine that hosts your database, ProcessRobot, automatically takes a backup of your PR Database for you upon upgrade and keeps it in "C:\ProgramData\Softomotive\ProcessRobot\Backup Server\YourDatabase_yyyy_MM_dd_hh_ss.bak"

4. Where can I find the connection string that is used upon upgrading the ProcessRobot Server?

It is in the following directory

"C:\Program Files\ProcessRobot\Server\AppConnectionString.config"
on the machine that hosts the ProcessRobot Server.

5. Where can I find the config file that targets the ProcessRobot Server on the Client Tools machines?

The default full path of the config file is:

"C:\Program Files\ProcessRobot\Server\AppServerAddress.config"
on the machine that hosts the ProcessRobot Server and any of the Client Tools.

6. Will all my processes be running with no issue? Are they going to be affected in any way from the upgrade?

All your processes will run fine, and the upgrading will not affect them in any way.