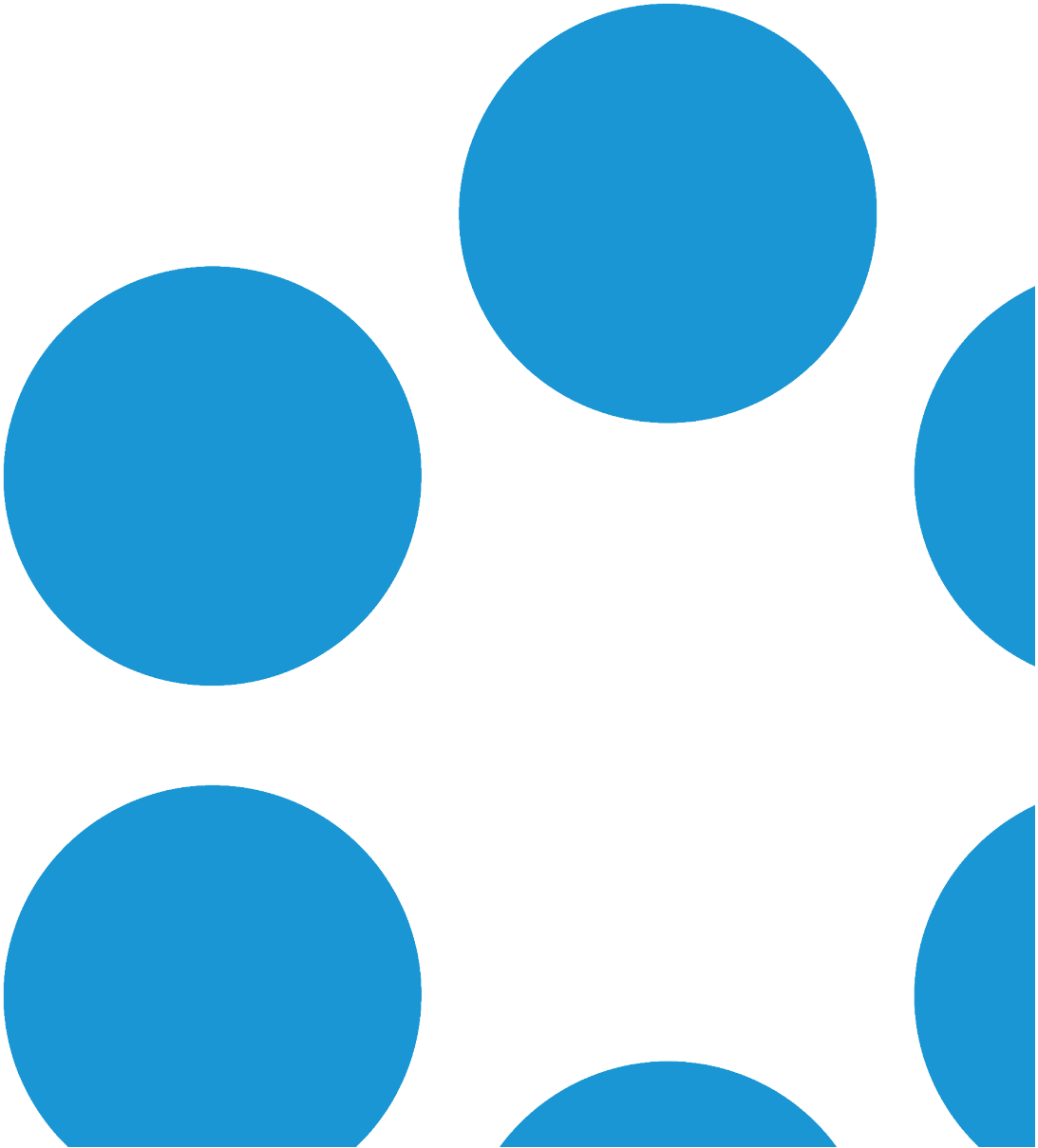
vFire 9.7

Installation and Upgrade Guide

Version 1.3



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Version Details

This document supports the latest version of the product. The table below contains version details for this and previous document versions.

Version Number	Date	Details
1.0	25 January 2017	This document describes how to install vFire 9.7. Significant changes to previous installation instructions include: • Resetting forgotten password settings. The default "Forgotten Password" setting on the vFire Self Service login window in 9.7 is that "Click here for reminder" is displayed. The **Forgot Password** settings are now maintained in Designer. See page 62 for more details. • Using the Maintenance Package. (This was available for earlier releases, but is now in common use.) See page 65 for more details. • Troubleshooting the Alemba API installation. All error messages arising from issues relating to the Alemba API are prefixed with their own text identifier. See page 35 for more details.
1.1	8 February 2017	Additional information in the Installing Client Components section on Installing Client Components from the MSI
1.2	23 February 2017	Additional information regarding creating backups and rolling back after an upgrade. See page 44 for more details. Removal of instruction regarding use of the maintenance package. This is not suitable for upgrades within the current release of 9.7.

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Version Number	Date	Details
1.3	27 February 2017	Reinstatement of instruction regarding use of the maintenance package, for upgrading from 9.7.2 to 9.7.3. **!** If you are upgrading from 9.7.2, you can use the maintenance package to upgrade to 9.7.3. If you are upgrading from any version lower than that, you must use the standard upgrade route.

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About this Guide

This guide describes the steps detailing how to install the latest version of vFire.

> This version of the guide contains instruction for the latest version of the vFire software. For earlier versions of vFire Core please refer to earlier versions of the guide as outlined in the version table.

Intended Audience

This guide is written for system administrators responsible for installing vFire.

Standards and Conventions

The following standards and conventions are used throughout the guide:

	Prerequisites, including security rights and access you may need prior to completing the task. Prerequisites are also highlighted in a shaded box.
	Information related to the current topic that may be of particular interest/significance. Notes are also highlighted in a shaded box.
	Warnings. These are also highlighted in a shaded box.
Field name	Fields are highlighted in bold text.

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Installing or Patching

Alemba ships two different software installations for each release:

- vFire Core Setup 9xx.exe (for example vFire Core Setup 970.exe)
- vFire Core Patch 9xx.msi (for example vFire Core Patch 970.msi)

The 'Setup' is used for installing new systems or upgrading from previous versions, such as v8 to v9. The 'Patch' is used for upgrading systems on the same versions to a new dot release, such as v9.1.5 to v9.7.0.

If you are viewing a release other than a beta release, you will also see a maintenance package. This is used to upgrade from point releases within the same version, such as v9.6.0 to 9.6.1.

There are different circumstances when they can be used as outlined below.

What I want to achieve	What I need to do
I want to create a brand new vanilla System	Install the latest vFire Core Setup 9xx.exe then use the Server Console system creation wizard.
I have an existing v9.x.x system and I want to upgrade it (on the same server)	Always take a backup of your existing system before preforming an upgrade. Install the latest vFire Core Patch 9xx.msi. The vFire Patch Tool will upgrade the system files and database.

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What I want to achieve	What I need to do
I have a v8 System I want to upgrade	The minimum version from which you can upgrade from v8 to v9 is v8RP40. If you have a version earlier than this, you must upgrade to v8RP40 before attempting to upgrade to v9. Always take a backup of your existing system before preforming an upgrade. 1. Stop all Infra v8 services on the application server 2. Install vFire Core Setup 9xx.exe. 3. Create a new system using the Server Console system creation wizard. 4. During system creation, point the new vFire Core system to your existing v8 database. The system creation wizard will upgrade the database and create the new v9 system.
I have a v9.x.x system, and I want to upgrade it and move to a new server at the same time.	Always take a backup of your existing system before preforming an upgrade. 1. Install the latest vFire Core Patch 9xx.**msi** on the old server and upgrade the database. 2. Decommission the old server - turn off the vFire Core Services and IIS Admin Service, and set their Startup Type setting to **Manual**. 3. Install the latest vFire Core Setup 9xx.**exe** on the new server. 4. On the new server, create a new system using the Server Console system creation wizard. 5. During system creation, point to the existing database, and when ask if you wish to upgrade the database, select **No**.

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What I want to achieve	What I need to do
I would like to upgrade between minor point releases.	Always take a backup of your existing system before preforming an upgrade. You can upgrade between minor point releases (e.g. 9.5.0 to 9.5.2) by applying a **Maintenance Package**, and in doing this you will not need to run through a full patch upgrade process. Download the maintenance package for the appropriate release from www.alemba.help, and follow the steps outlined in page 65. This only applies to version 9.4.0 and higher. The maintenance package is not suitable for upgrading from 9.7.0 or 9.7.1 to 9.7.2, due to the nature of some of the enhancements in the 9.7.2 release. Instead, you should use the standard upgrade process. Any upgrades from 9.7.2 to a higher 9.7 version can be done using the maintenance package.

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Configuring the Server

Before you start

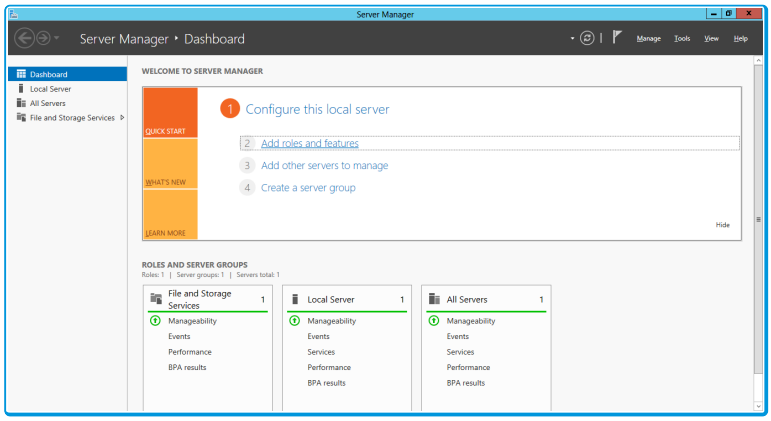
Before doing an installation, check that your server and client machines meet all the prerequisites for web server deployment, database server requirements and client requirements .

If you are using an Oracle database, you need to ensure that you are running Oracle client version 12c or higher before installing vFire Core. To update the dictionary system statistics, you must have Database Account privileges on the GATHER_SYSTEM_ STATISTICS role.

To configure the Windows 2012 Server for vFire Core, follow the instructions in this section.

If you are using Windows 2008, you will need to follow the instructions outlined on page 82.

1. Go to the **Server Manager** application, select **Dashboard**, and select the **Add roles and features** link.



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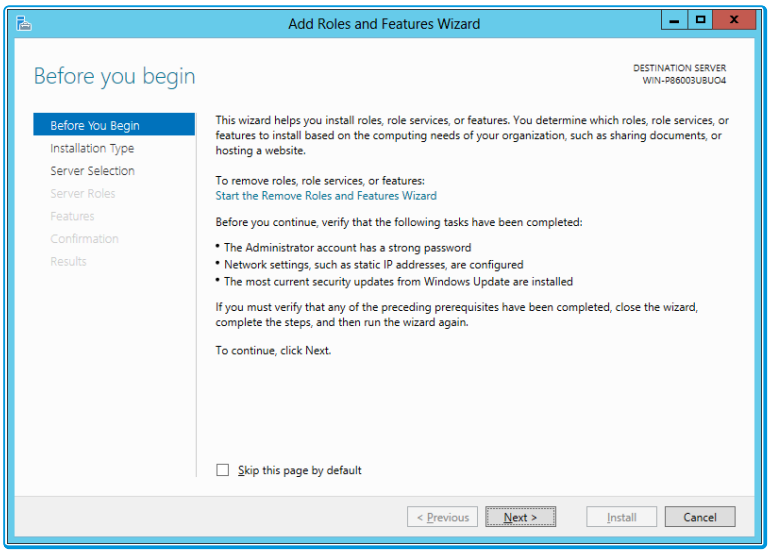
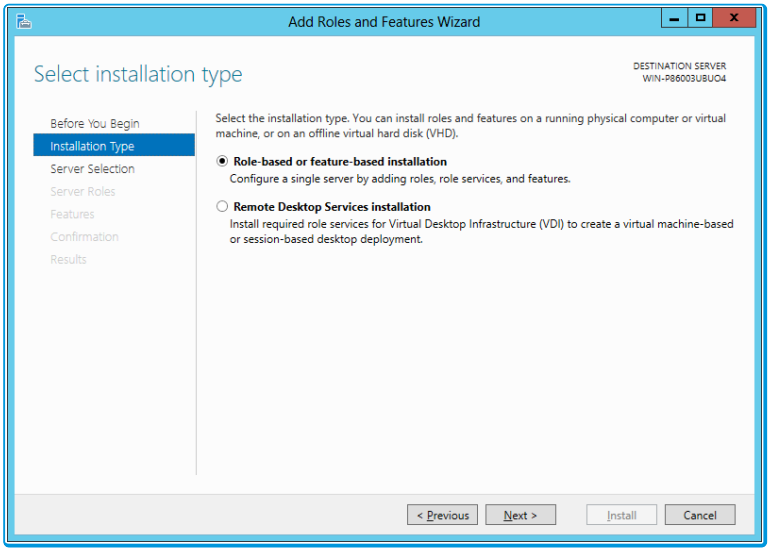
2. This will bring up the **Add Roles and Features Wizard** which opens on the **Before You begin** window. Read this page carefully and ensure that you have completed the tasks listed.



3. Select **Next** to continue.
4. On the **Select installation type** window, select **Role-based or feature-based installation**.



5. Select **Next** to continue.

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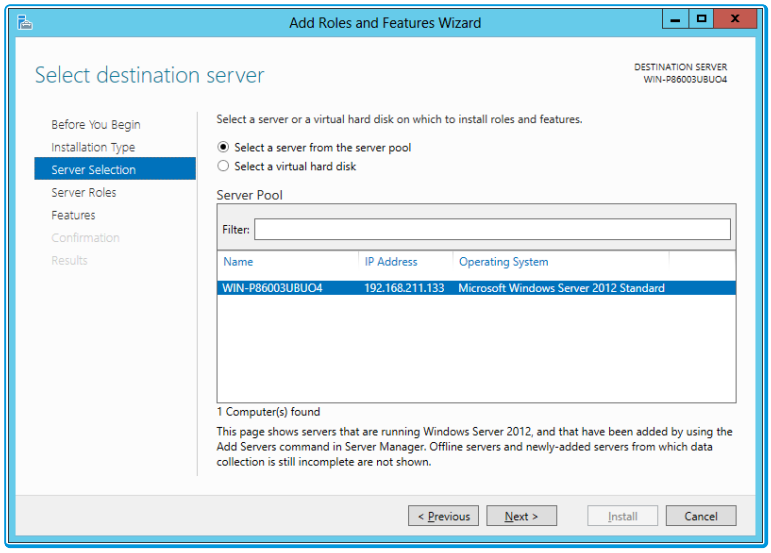
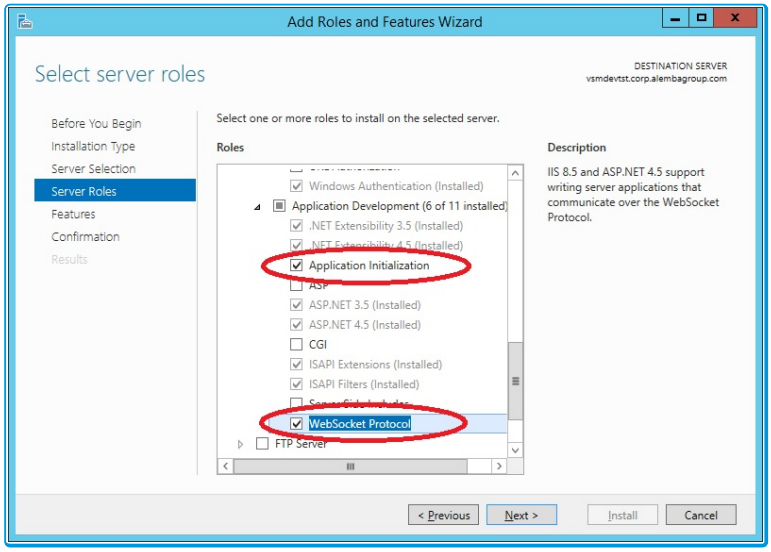
6. On the **Select destination server** window, select the server that you will be using.



7. Select **Next** to continue.
8. In the **Select server roles** window, the **Description** field on the right side of the window gives you an explanation of the purpose of the different roles. Within **Application Development**, select **Application Initialization** and **WebSocket Protocol**.



These options will not be available if you are working in Windows 2008.

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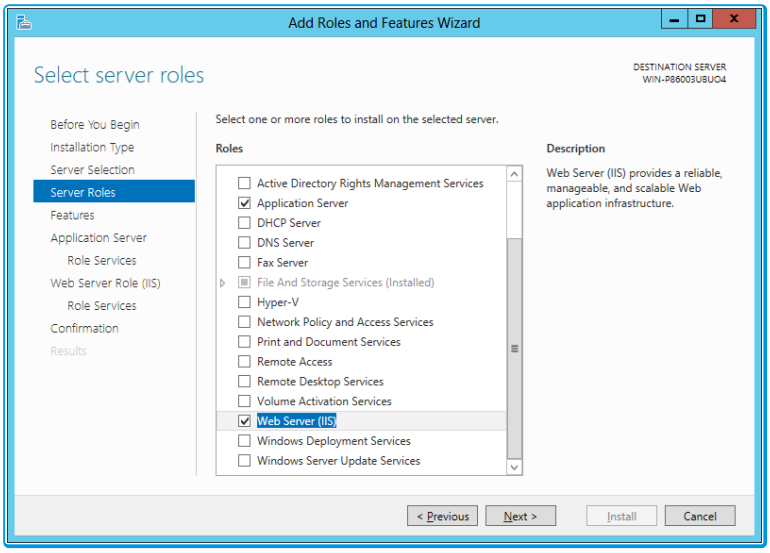
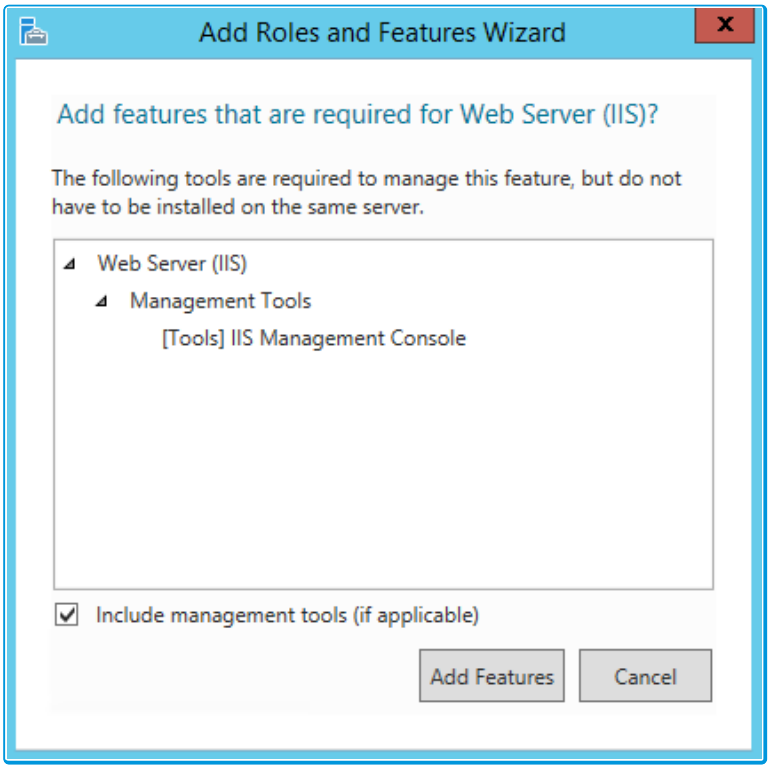
9. Select **Application Server** and **Web Server (IIS)** as a minimum requirement.



10. When you select **Web Server (IIS)**, the **Add Roles and Features Wizard** window is displayed, prompting you to add management tools.



11. Select **Add Features**. The window closes and you are returned to the **Select server roles** window.
12. Select **Next** to continue.

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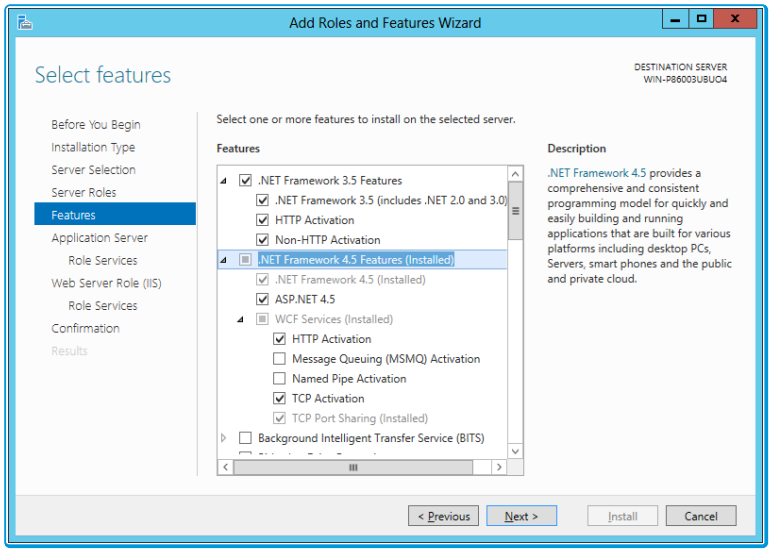
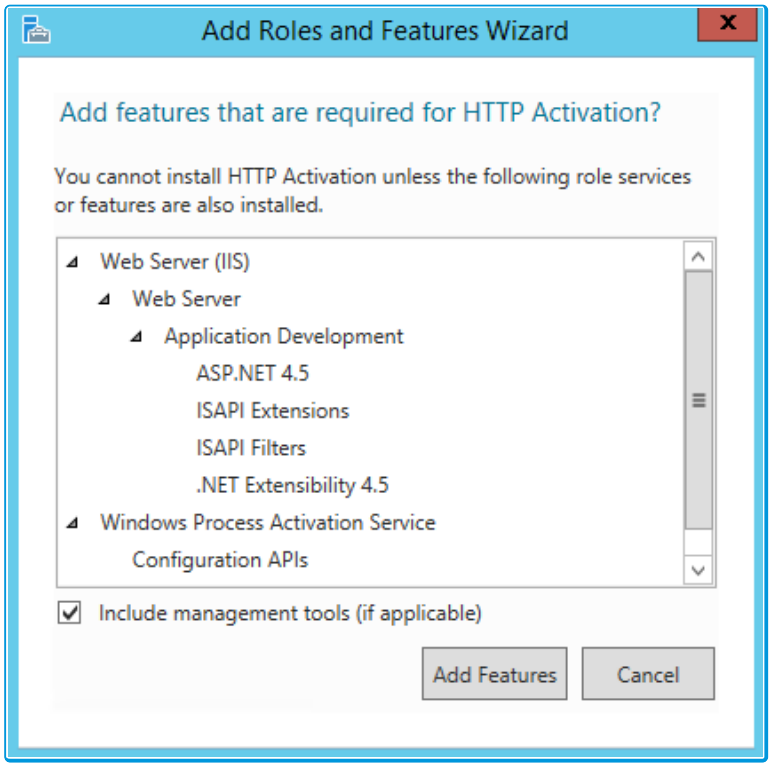
13. In the **Features** window, ensure that the following options are selected.



14. When you select **HTTP Activation** under .NET Framework, the **Add Roles and Features Wizard** window is displayed, prompting you to add further features.



15. Select **Add Features**. The window closes and you are returned to the **Select features** window.

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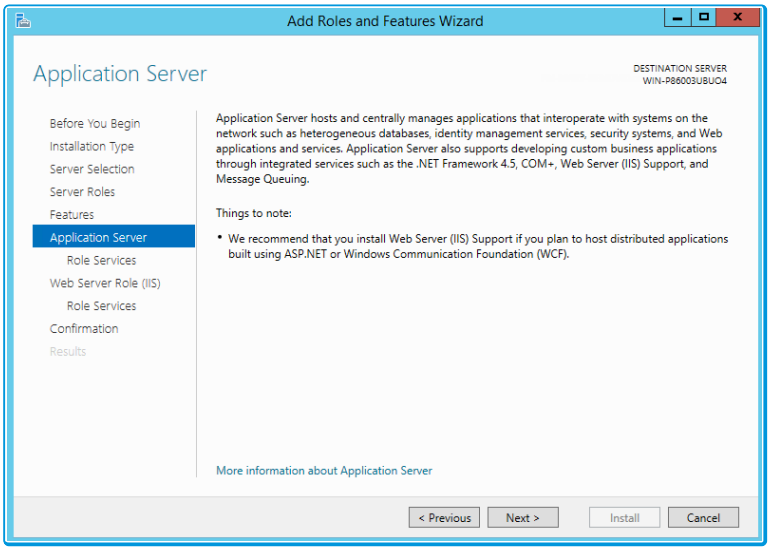
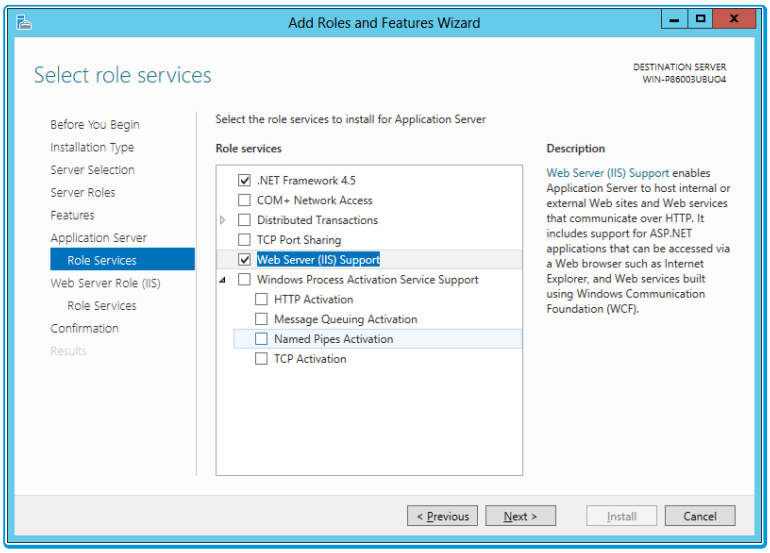
16. Continue adding the features. When you select **HTTP Activation** beneath **WCF Services**, you will see the **Add Roles and Features Wizard** window again. Select **Add Features** to add the required features and return to the Select features window once more.
17. Select **Next** to continue.
18. The **Application Server** window is displayed, giving you information about the application server. Read through the details to ensure you are familiar with them.

You may not see this window if you are upgrading.



19. Select **Next** to continue.
20. In the **Select role services** window, select the following role services for the application server.



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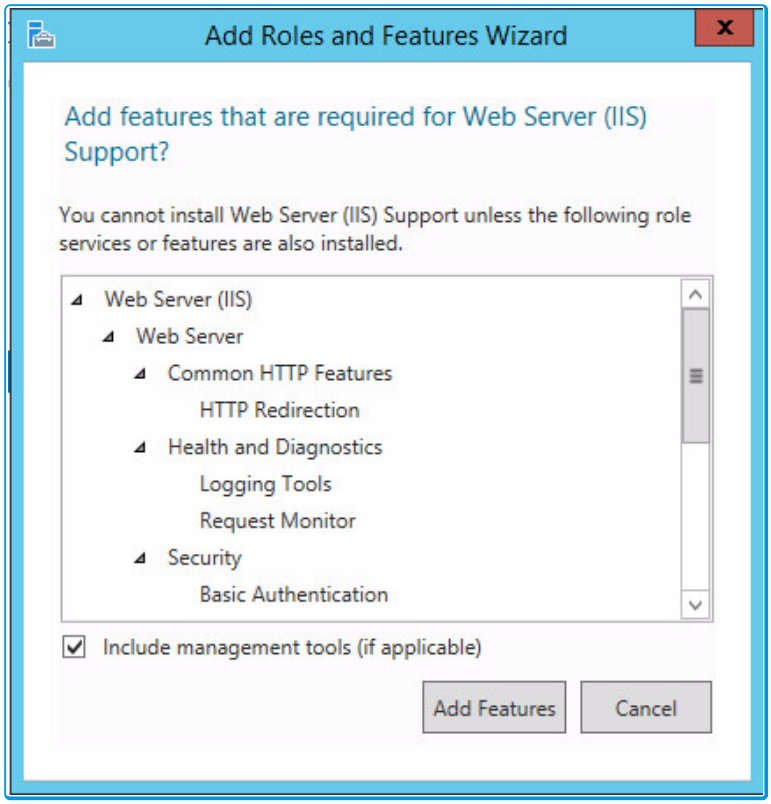
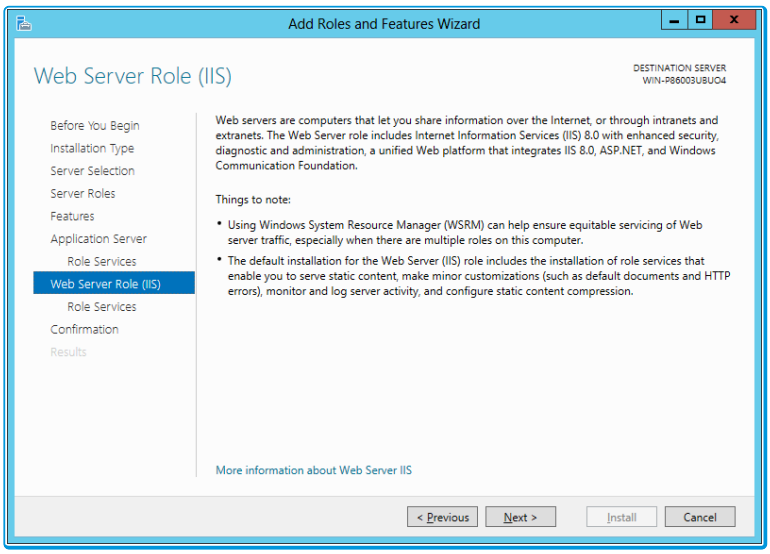
21. When the **Add Roles and Features** window is displayed, add the features.



22. Select **Next** to continue.
23. In addition to role services for the **Application Server**, you will need to select Role Services for the Web Server Role (IIS). On the **Web Server Role (IIS)** window, read the information provided.



24. Select **Next** to continue.

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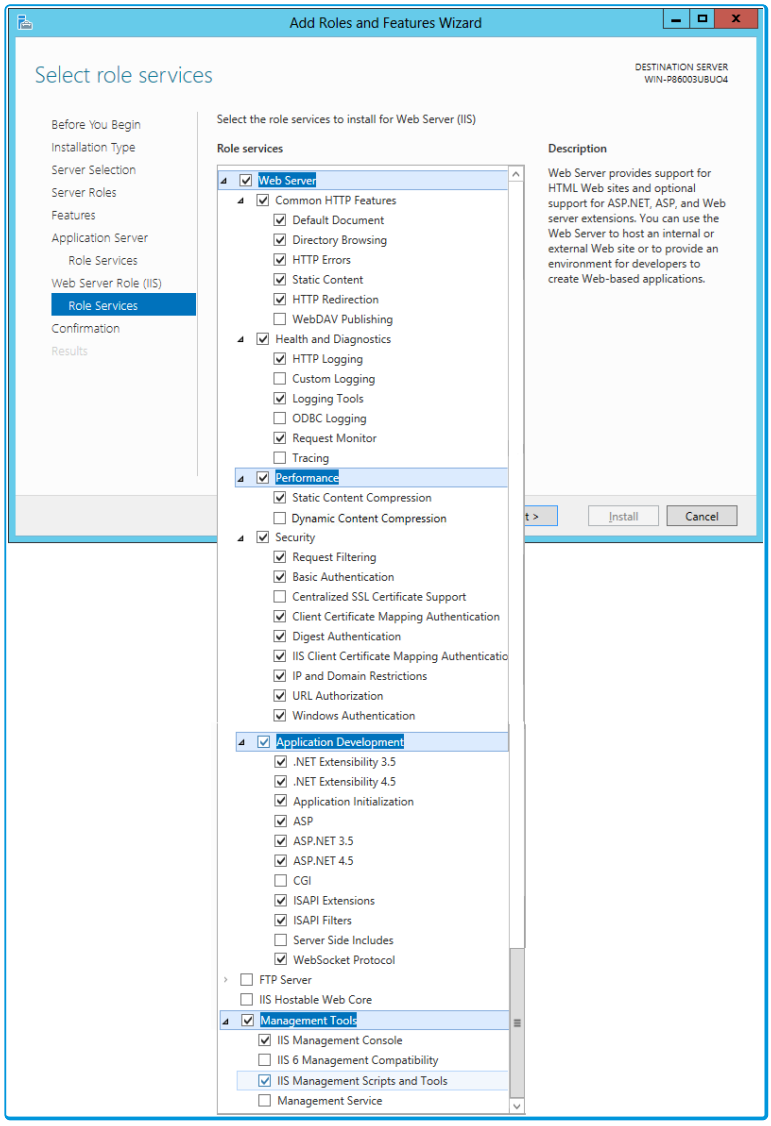
25. On the **Select role services** window, ensure that all of the roles shown in the following screenshot are ticked.



> vFire Core provides its own **Dynamic Content Compression**, which tests indicate performs slightly better than IIS Dynamic Content Compression. Disabling IIS Dynamic Content Compression is a viable option but not required.
> Dynamic Content Compression is automatically enabled in IIS. When disabled, the Web Server (IIS) Support Role is also disabled, therefore, it is recommended you review the Role Services enabled by the Web Server (IIS) Support Role and manually re-enable those required for your environment.

26. Select **Next** to continue.

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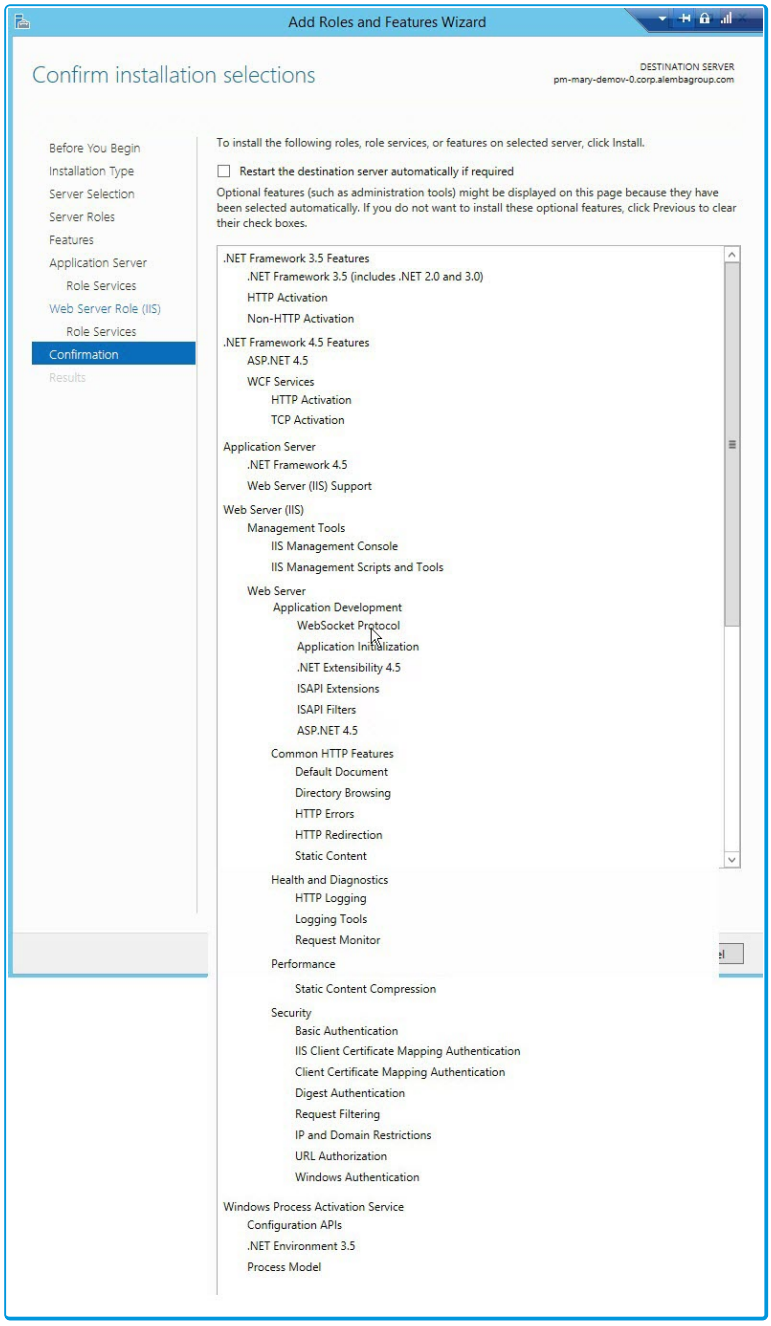
27. In the **Confirm installation selections** window, confirm that you have the following selected. Scroll down to see the details.



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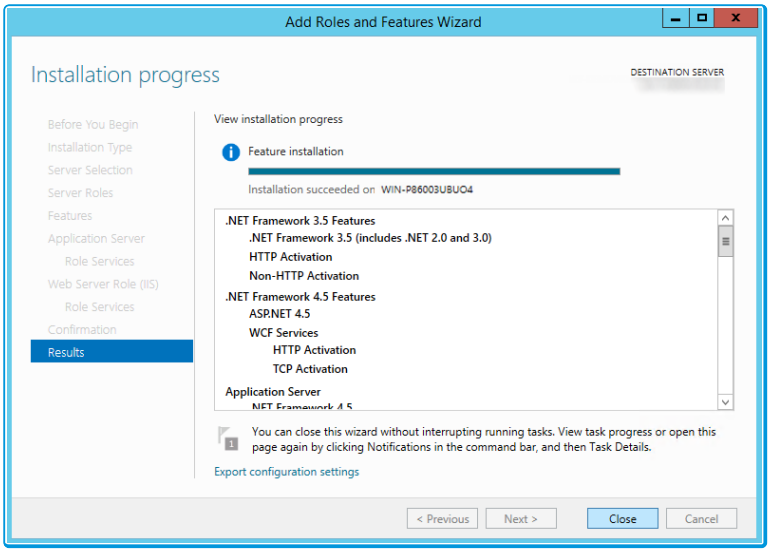
28. Select **Install** when you are ready to proceed. When installation is complete, the results window will display all roles, role services and features which have been installed.



29. Select **Close** to close the wizard. The configuration is complete.

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Polling Services

Installing vFire Core installs the polling services automatically. The polling service in this version of vFire Core comprises eleven Windows services.

vFire Services

All vFire services must use the same service account, and that account must be able to access the database.

The following table lists these services and provides a brief description of the tasks each service performs.

Service	Tasks performed by the service
Administrative	Parent service for all vFire Core services
Config Portability	Processing configuration portability export and import
Connector	Service for connectors, such as Federated CMDB and Event Management
Core	A number of tasks including: • Executing escalation and depreciation tasks • Sending Knowledge review notification • Sending Bulletin Board activation notification • Creating scheduled requests • Activity log and session expiry tasks • Creating Calls or Requests when CMDB Thresholds are exceeded
Custom	Running custom polling logic
Escalation	Processing service level management events
Indexing	Text Indexing
Messaging	A number of tasks including: • Generating User Surveys • Sending and receiving email and pager messages

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Service	Tasks performed by the service
Proactive Analysis	Processing Proactive Analysis rules
Reporting	Processing scheduled reports
Workflow	Activating Tasks including: • Reset delay times • Close delay tasks when target time is reached • Close active tasks set to auto close • Activate task dependencies on closure • Close redundant tasks • Reopen recursive tasks

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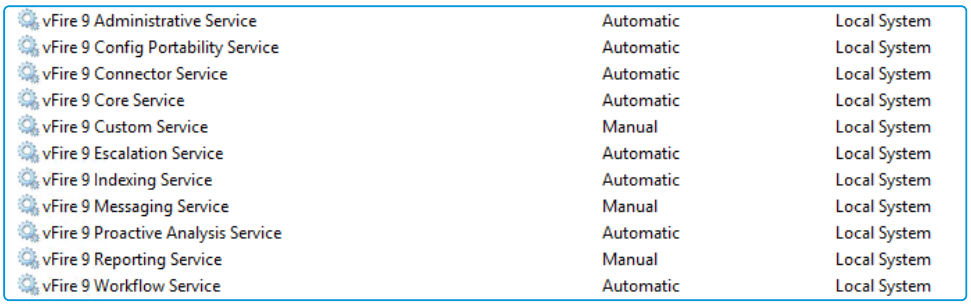
Setting the Polling Service Startup Type



vFire 9 Administrative Service	Automatic	Local System
vFire 9 Config Portability Service	Automatic	Local System
vFire 9 Connector Service	Automatic	Local System
vFire 9 Core Service	Automatic	Local System
vFire 9 Custom Service	Manual	Local System
vFire 9 Escalation Service	Automatic	Local System
vFire 9 Indexing Service	Automatic	Local System
vFire 9 Messaging Service	Manual	Local System
vFire 9 Proactive Analysis Service	Automatic	Local System
vFire 9 Reporting Service	Manual	Local System
vFire 9 Workflow Service	Automatic	Local System

You can set a service startup type to be automatic or manual. This is done on the **Services** window.

1. Open **Control Panel** from the Windows Start menu.
2. Select **System and Security** and then **Administrative Tools**.
3. From the **Administrative Tools** list, select **Services** to bring up the Services window.
4. Right-click the service you want to set, and select **Properties** from the menu displayed. The **<Service Name> Properties** window appears.
5. From the Startup type list, select:
    - **Automatic** to start the service automatically
    - **Manual** to enable system admins to run the service when required
    - **Disabled** to prevent the service from running

Some services will start automatically when the vFire Core server is re-started unless the startup type is set to **Manual**.

Stopping a Polling Service

To manually stop a service:

1. Open **Control Panel** from the Windows Start menu.
2. Select **System and Security** and then **Administrative Tools**.
3. From the **Administrative Tools** list, select **Services** to bring up the Services window.
4. Right-click the service you want to stop, and select **Stop** from the menu displayed.

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Installing vFire Core

You only need to perform the install operation on the server. Although each Analyst will be prompted to automatically download the vFire Core ActiveX controls, there is no need to install software on any client machines.

> **!** Do not put any third party software on the vFire Core server after installation without consultation with Alemba staff. Alemba cannot be held responsible for any problems encountered with our software caused by other programs installed on the vFire Core server. It is recommended that you install any third party software on a test server first and review the Alemba Knowledge Bank for any known issues.

For sites that are security conscious, Alemba recommends setting up SSL on the web server.

Before you start

You will need a license key, provided by Alemba.

Ensure that your server meets the technical requirements for installing vFire Core, as outlined in the **Prerequisites Guide**.

Configure the server as described on page 11.

For a brand new instance of vFire Core, you must create a blank database in your database engine.

Stop all vFire Core dependent Windows Services before running the installer to avoid an error 1603. From the Windows Start menu, select **Control Panel**, **Administrative Tools** and then **Services**.

Installing vFire Core will stop IIS and any dependent services. Ensure that you install vFire Core at a time when these services are not needed.

Starting the Installation

1. Log in to the Alemba vFire Self Service portal, select **Browse The Service Catalog**, and place an Order for the **vFire Core vx.x Setup File** (where x.x is the appropriate version number). After submitting the order you will receive an email with a link to download the software.

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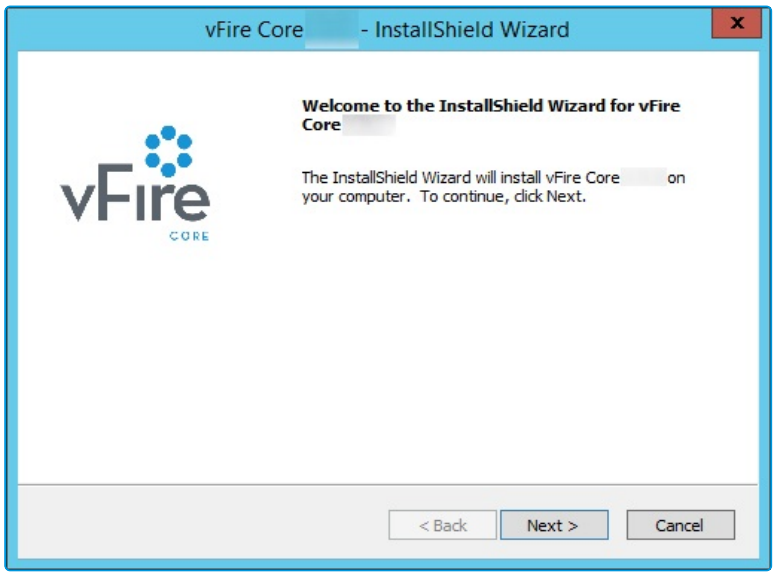
2. Download and extract the ZIP file **vFire Core Setup x.x** which consists of an executable setup file that will run the InstallShield program that installs vFire Core.
3. Right click on the file and select **Run as Administrator**.
4. The **User Account Control** window appears. You will be prompted to allow the vFire Core application to begin the setup process. Select **Yes** to proceed.

   An error message might display if, for example, you do not have the correct service pack for the operating system installed on your server, or the correct version of MMC. Check the **Prerequisites Guide** for more information about the minimum requirements for a vFire Core installation.

5. The first window of the **vFire Core InstallShield Wizard** will display.



6. Select **Next** to continue.

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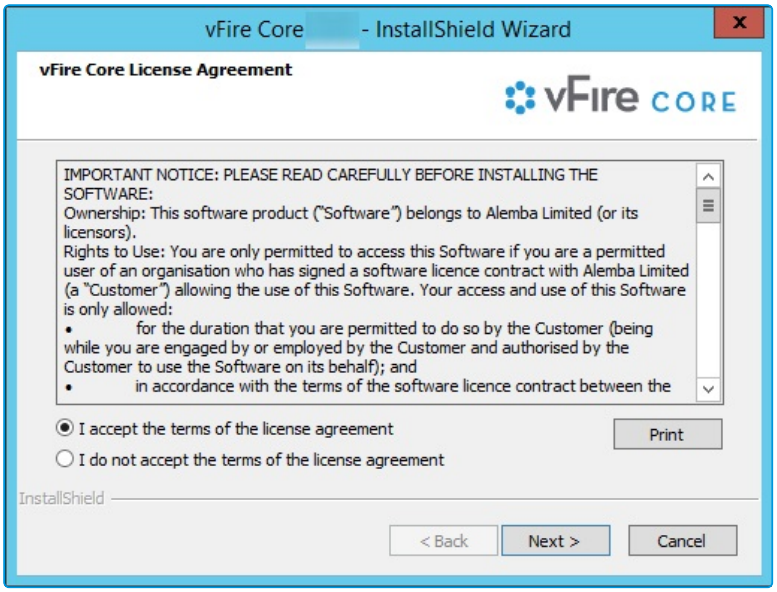
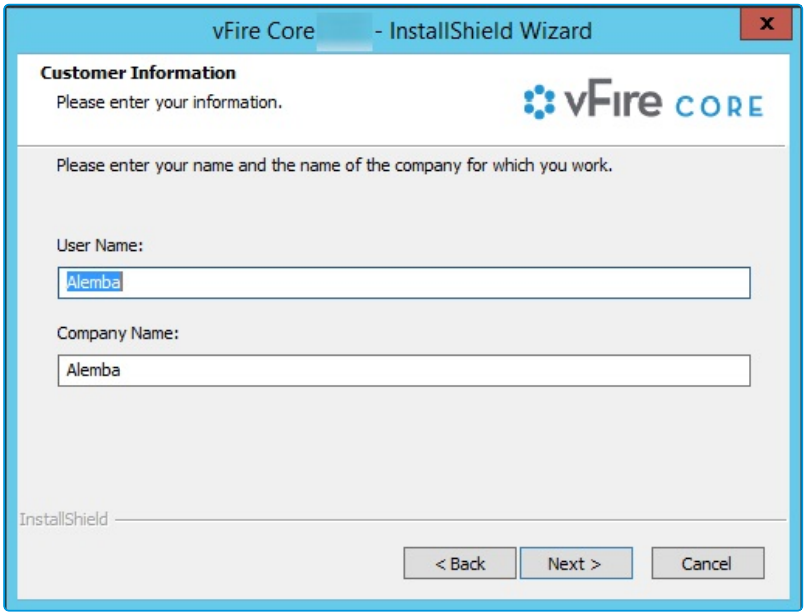
7. In the vFire Core License Agreement window, read the terms and conditions.



8. To print a copy of the license agreement, select **Print**. Accept the terms and then select **Next** to continue.
9. The **User Information** window displays the **User Name** and **Company**. These fields are automatically filled with your current login details. If required, modify this information.



10. Select **Next** to continue.

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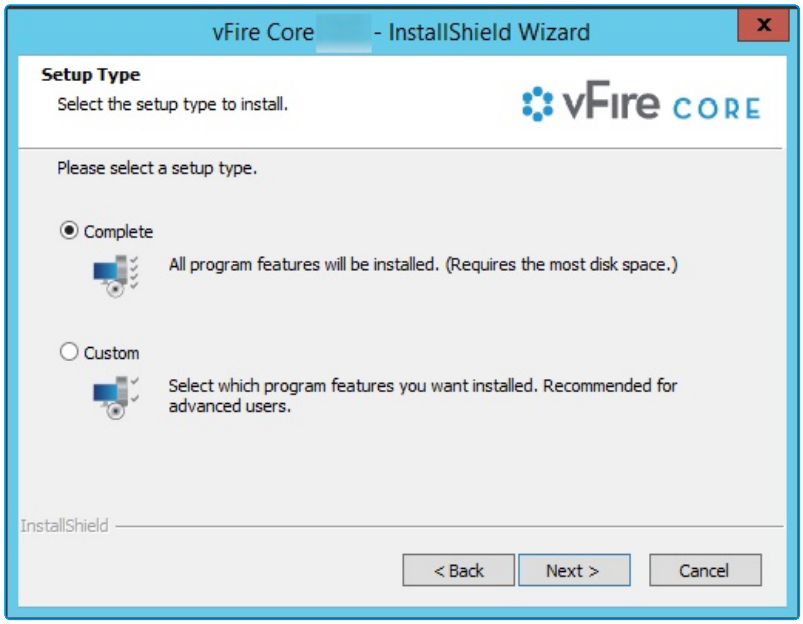
11. The **Setup Type** window appears.



12. Select **Complete** to install vFire Core into the default directory: **C:\Program Files\Alemba\vFire**. This is the recommended option.
13. Select **Custom** to specify a different directory on your computer as the installation directory.
14. Select **Next** to continue.
15. If you have selected **Custom**, the **Choose Destination Location** window is displayed. To change the folder in which vFire Core is installed, select **Browse**. Choose an installation folder from the directories list.

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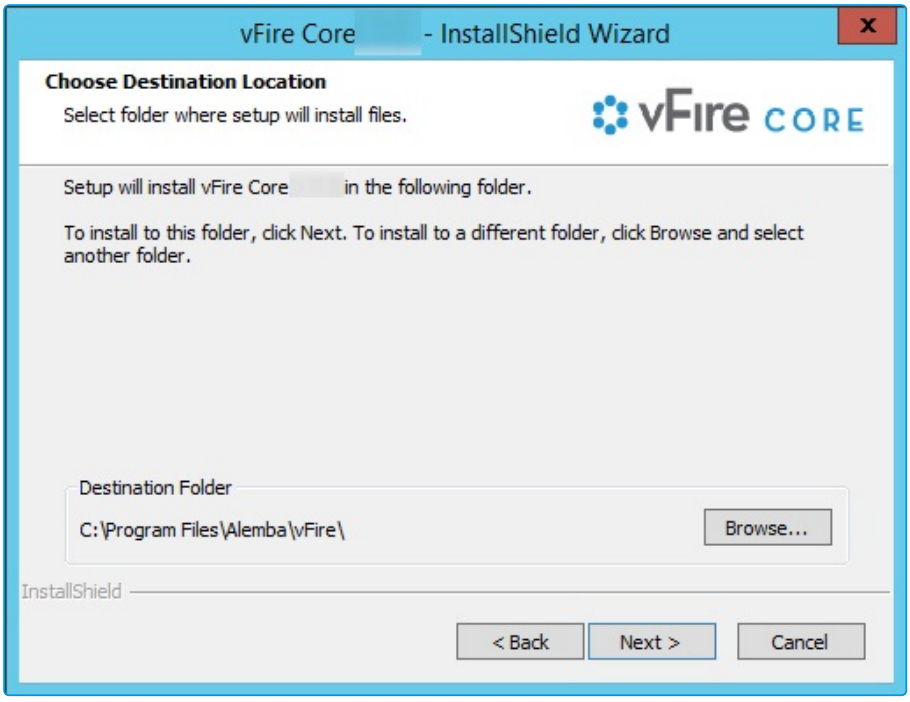
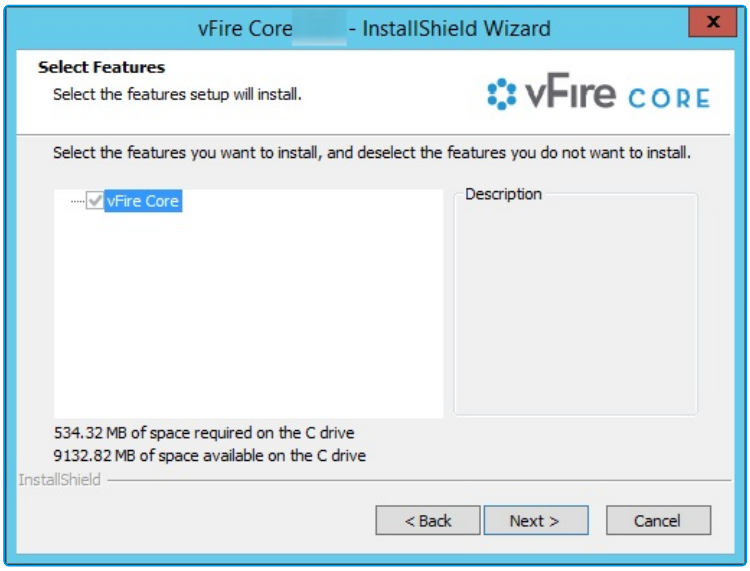


16. Select **Next** to continue.
17. If you are performing a **Custom** install, you also need to complete the **Select Features** window. The only option is vFire Core, which is selected by default.



18. Select **Next** to continue.
19. In the **Ready to Install the Program** window, select **Install** to proceed with the installation.

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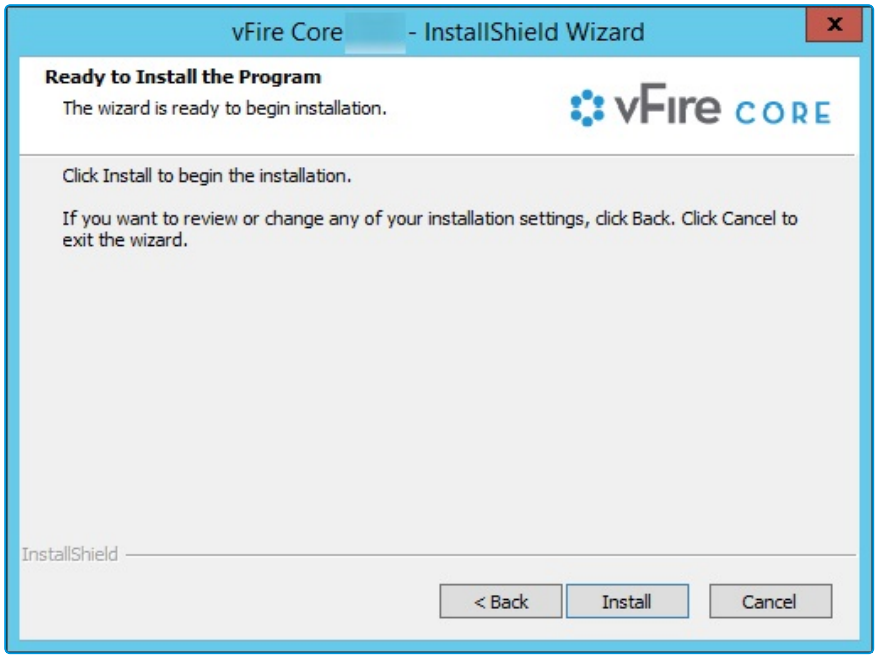
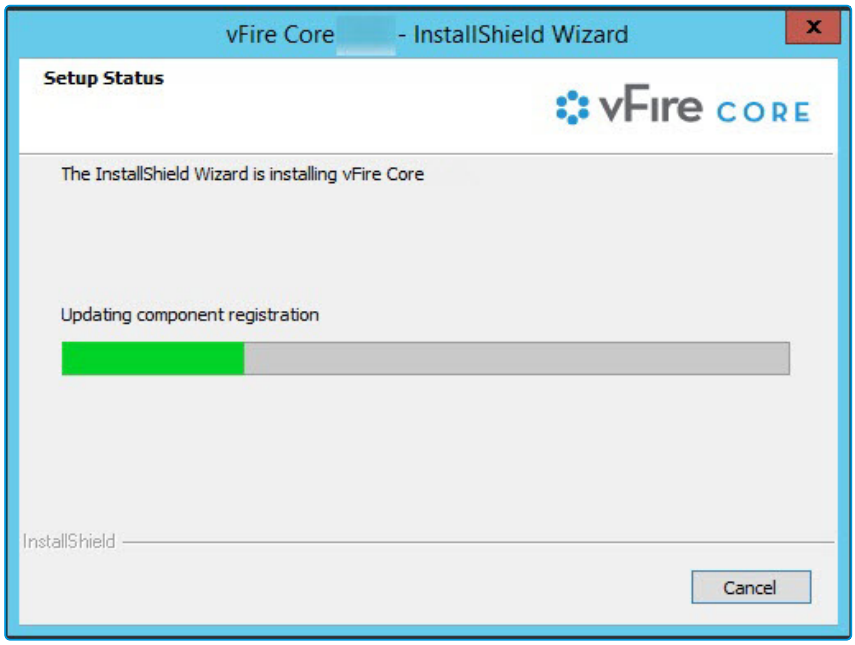


20. You will then get a window informing you that IIS needs to be stopped in order to continue. Select **Yes** to stop IIS and all dependent services and continue with installation.
21. The vFire Core files are copied to the computer. This may take several minutes. You will be prompted that IIS must be stopped if this has not already been done. Select **Yes** to continue.



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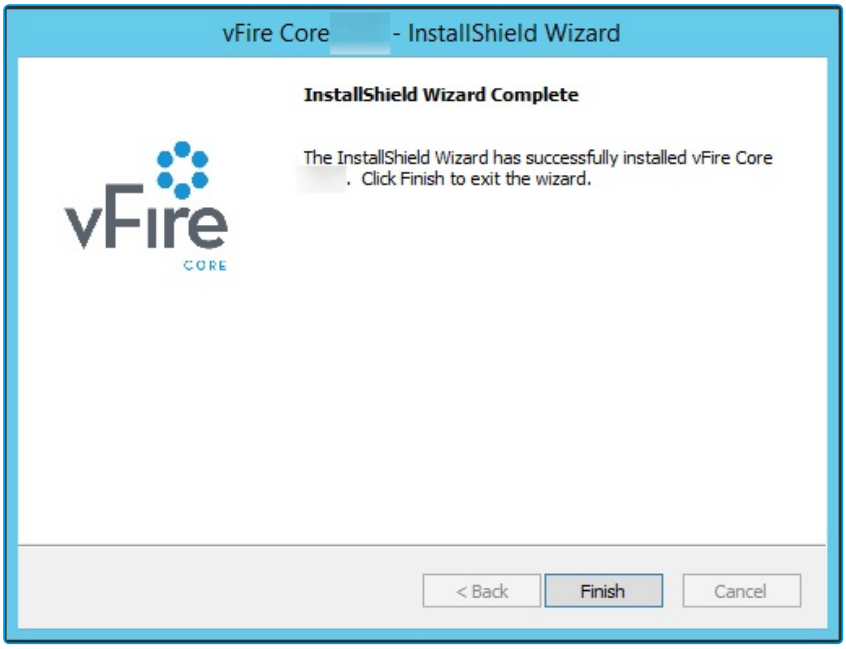
22. Once installation is complete, the **InstallShield Wizard Complete** window appears.



23. Select **Finish** to exit the InstallShield Wizard. The installation process for vFire Core is complete. The next step is to open the vFire Core Server Console to create and configure your new system.

Creating a New vFire Core System

Creating a vFire Core system from a blank database is performed through the Server Console after installing vFire Core.

Follow the steps outlined in **Creating a New System** in the **vFire Core Server Console Guide**.

Installing and Upgrading on Multiple Web Servers

vFire Core can be installed on more than one web server all accessing the same database with the load distributed using a load balancer as illustrated below.

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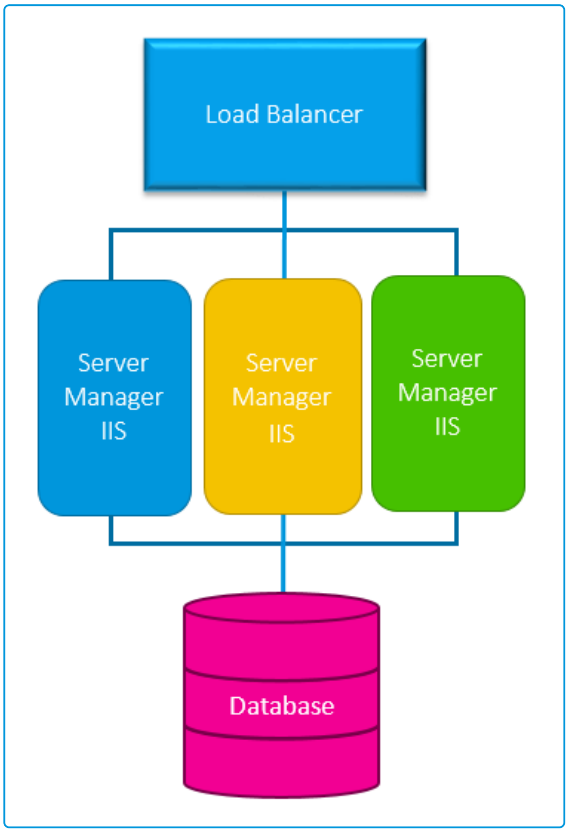

vFire Core must be installed on each server. A new system must then be created and configured on each server.

If **upgrading** in a multi-server environment, the upgrade only needs to be run once on the shared database. On the second and subsequent servers, make sure that you select **No** when prompted to upgrade the database.

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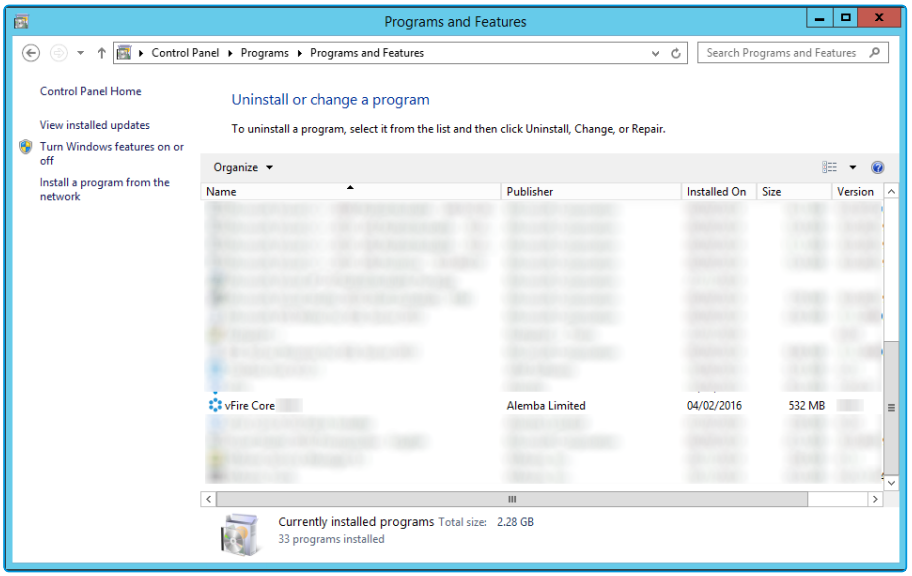
Uninstalling vFire Core

You would normally uninstall vFire Core before you install a new version of vFire Core. Uninstalling vFire Core will stop IIS and any dependent services. You do not need to uninstall if you are performing a patch or upgrade.

Before you start

Ensure that no vFire Core files are being used or open. Files are found in the default directory C:\Program Files\Alemba\vFire or another directory you have specified.

1. Start the Windows **Control Panel**, and select **Programs**. From the Programs window, select **Programs and Features**. A list of installed programs will be displayed.



2. Select **vFire Core**. To remove the application, right-click and select **Uninstall**.
3. A message prompting you to confirm that you want to uninstall vFire Core appears. Click **Yes** to continue with the uninstallation.
4. If you have any open programs, you will be prompted to close them. Select whether or not to automatically close applications and click OK.

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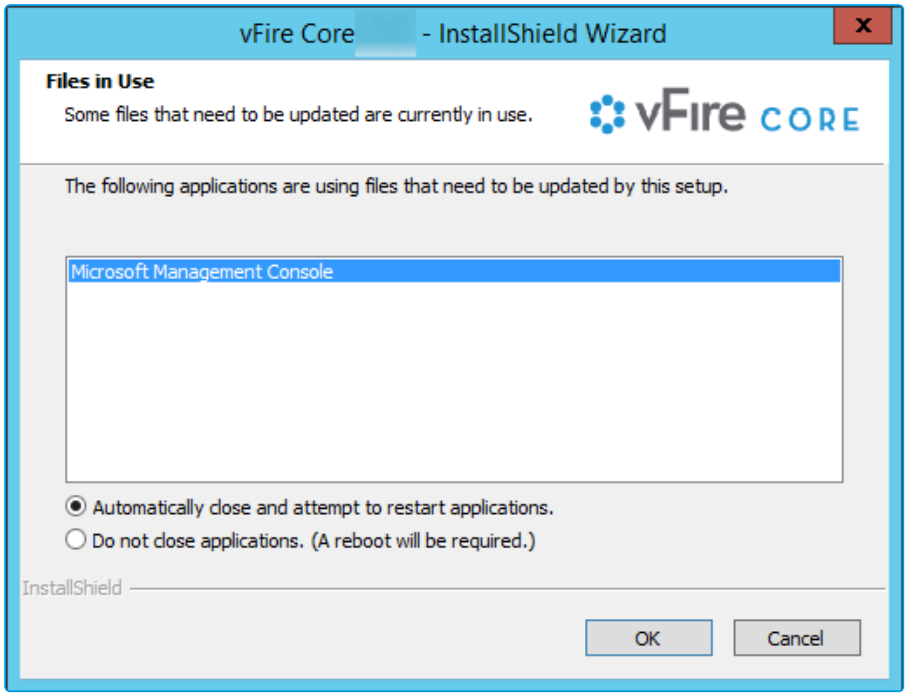
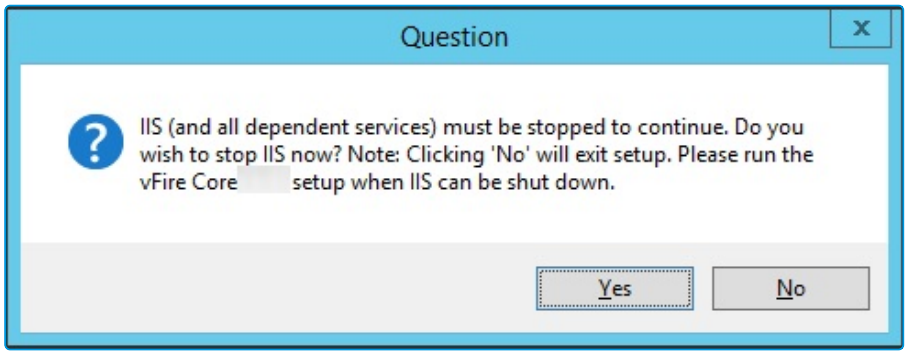


5. After validation is complete, a message prompting you to confirm to stop IIS and all dependent services appears.



6. Click **Yes** to stop IIS and all dependent services and continue with the uninstallation, or click **No** to abort the process.
7. If **Yes** is selected, removal of vFire Core files will start

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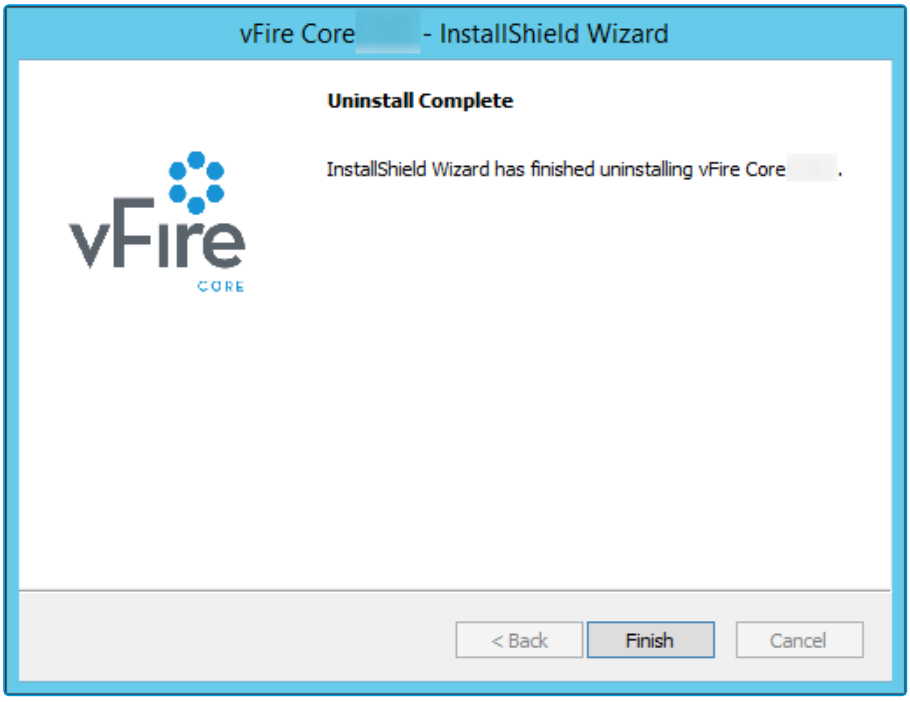
8. After this is complete an **Uninstall Complete** confirmation window will be displayed.



9. Select **Finish**. vFire Core is now uninstalled.

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Troubleshooting and FAQ

Why are some vFire Core files left on the server when I uninstall vFire Core?

If any vFire Core files are left open or are being used, those files will not be uninstalled because of Microsoft Explorer's restrictions. Before you uninstall vFire Core, ensure that no vFire Core files are being used or open. Files are found in the default directory C:\Program Files\Alemba\vFire or another directory you have specified.

I am getting error messages when I run Chat

One of the most common reasons for error messages and Chat working incorrectly is incorrect configuration of your virtual directory. Ensure that your system is pointing to the correct virtual directory and, if you have several systems, that they are each pointing to their own.

My Chat analysts are not showing as online.

Ensure that your system is pointing to the correct virtual directory.

Should vFire be added to the antivirus exclusion list?

Yes, exclude the vFire Core virtual directory and install location from antivirus scans and real-time monitoring.

I have received an error with the prefix "Error Running PowerShell Script" or the "Alemba.zip package".

Errors referencing PowerShell or the Alemba.zip package relate to PowerShell 5, required for using the Alemba API; and the Alemba API package itself. The Alemba API package is not required to run vFire 9.7, and you can run the scripts again in your server console. See Running Custom PowerShell Scripts in the online help for more details.

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Upgrading Your System

You can upgrade your system using the vFire Core Patch Tool. It is recommended that you read this section fully before applying a patch.

Before you start

Create a backup of your databases before upgrading as the Patch Tool **will not** backup your database.

Backup your system files and registry settings as the Patch Tool **will not** create a backup. Ideally, create a snapshot or backup of the virtual web server, enabling a swift and simple rollback should the need arise.

Close the vFire Core Server Console and ensure that you are not logged in before running the upgrade otherwise an error will occur.

If you are performing an upgrade from a version lower than 9.2.0, it will invalidate your existing license key. You must have an updated license key to run vFire Core. Contact Alemba Support for more details if necessary.

1. Ensure that your system meets the prerequisites outlined in the **Prerequisites Guide**.
2. Familiarize yourself with the information in the **Installing or Patching** section, on page 8.
3. **Install the vFire Patch Tool** (page 46). If you have already installed it, simply run through the wizard again.
4. Create a backup as described on page 43.
5. Carry out a **Screen Pre-upgrade**, as described on page 51.
6. Run the vFire Patch Tool, as described on page 55.
7. Apply the license key, if necessary, as described on page 55.
8. Should the need arise, roll back the upgrade as described on page 44

! If you are using vFire Officer & Portal, you must disable the constraints before upgrading vFire Core, and enable them again when the upgrade is complete. You then need to upgrade Officer & Portal to ensure that you have a compatible version. See the **technical note** on the website.

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Considerations When Upgrading to 9.3 or above

This section describes extra steps required after upgrading to vFire 9.3 and higher, if the features and functions listed below were in use prior to upgrade.

vFire App

If the vFire app is enabled in your environment, it needs to be re-enabled after upgrading to 9.3 by re-configuring the web.config file.

1. Download the **vFire Core 9.2.1 mobile hotfix pack** which contains all the necessary files. Alemba Support will provide you with this.
2. Extract the contents.
3. Stop all vFire Core services. You will need to exit vFire Core, stop all vFire Core services and restart IIS.
4. Open the folder which contains your vFire Core installation.

   If you installed 9.2 from a clean install, the location will be **C:\Program Files (x86)\Alemba\vFire**

   If you upgraded vFire Core from an older version (pre 9.2), the location will be **C:\Program Files (x86)\VMware\Service Manager**

   The location may be different if you have used customized install locations.
5. In the mobile pack, navigate to the **RootFiles** subdirectory and copy:

   `Infra.Rules.dll`

   to:

   C:\Program Files (x86)\Alemba\vFire

   (or the equivalent location if your settings are customized or showing older file names). You will be prompted to replace the existing file. Confirm the replacement.
6. In the mobile pack, navigate to the **System Files\Bin** subdirectory and copy the following:

   `Infra.API.dll`

   `Infra.Rules.dll`

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to:

C:\Program Files (x86)\Alemba\vFire\System1\Bin

(or the equivalent location if your settings are customized or showing older file names). You will be prompted to replace the existing files. Confirm the replacements.

7. In the mobile pack, navigate to the **SystemFiles\Config** subdirectory and copy:

   `queries-mobile.sql`

   to:

   C:\Program Files (x86)\Alemba\vFire\System1\Config

   (or the equivalent location if your settings are customized or showing older file names). You will be prompted to replace the existing file. Confirm the replacement.

8. In the mobile pack, navigate to the **SystemFiles\Config\90201** subdirectory, and copy:

   `patch-default-values.xml`

   to:

   C:\Program Files (x86)\Alemba\vFire\System1\Config\90201

   (or the equivalent location if your settings are customized or showing older file names)

9. In **C:\Program Files (x86)\Alemba\vFire** (or equivalent), select **serverconsole.msc** to open the Server Console.

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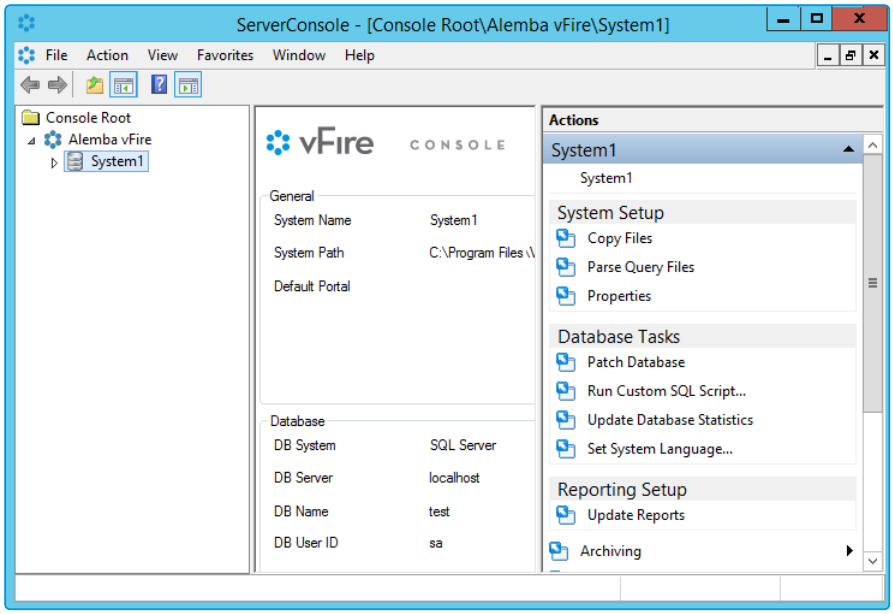
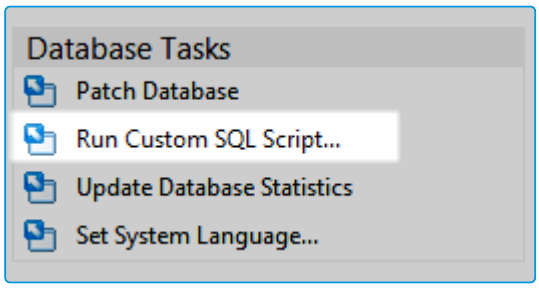
10. Select the web server that you are configuring. (In our example, it is System1.)



11. Select **Run Custom SQL Script** from beneath **Database Tasks** in the **Actions** menu on the right of the window.



12. This opens the **Run Custom SQL Script** window. Navigate to the **C:\Program Files (x86)\Alemba\vFire\System1\Config\90201** folder if necessary.

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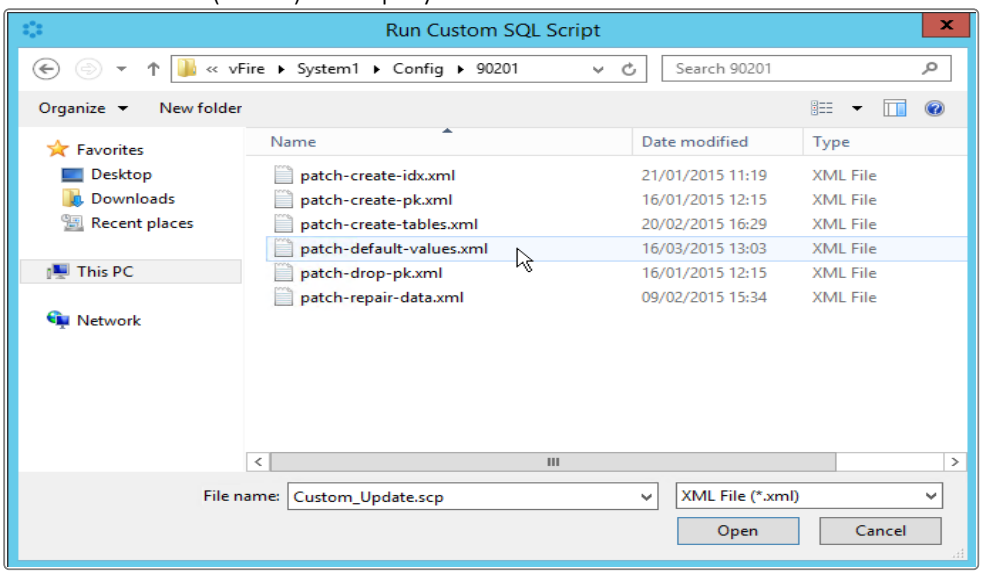
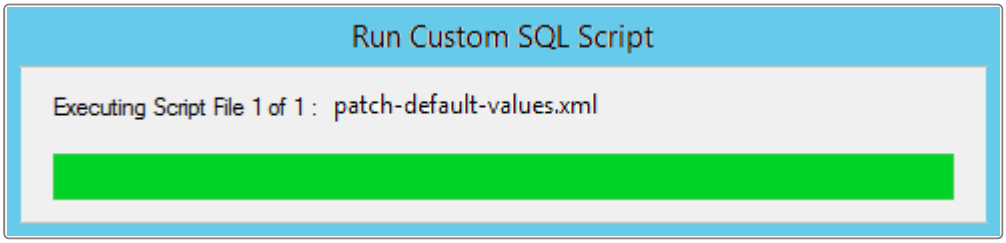
13. The file type at the bottom of the window will be showing 'Script File (*.scp)' change this to XML File (*.xml) to display xml files.

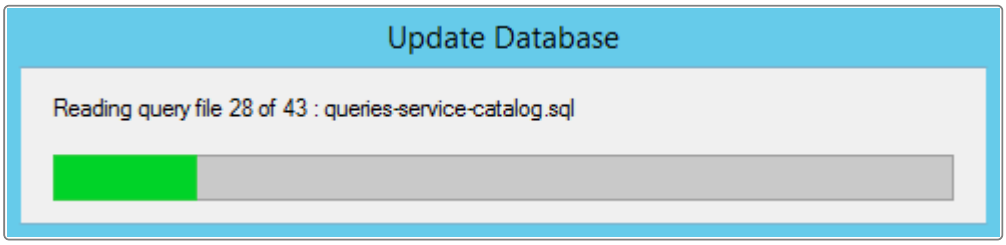


14. Select **patch-default-values.xml**. This will run the script.



15. When this is complete, you will be asked if you want to run any more scripts. Select No.

16. The database will update.



17. Close the Server Console when this is complete. Select Yes to save settings.

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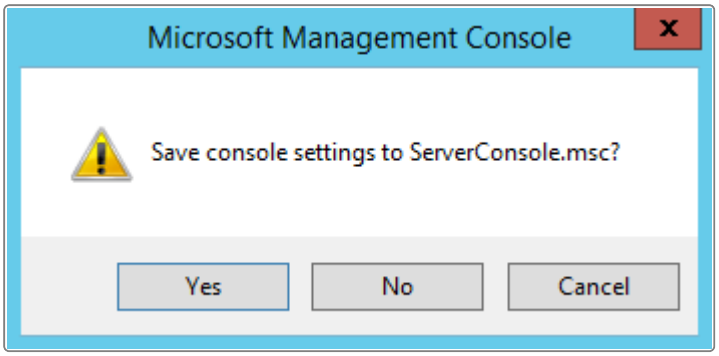
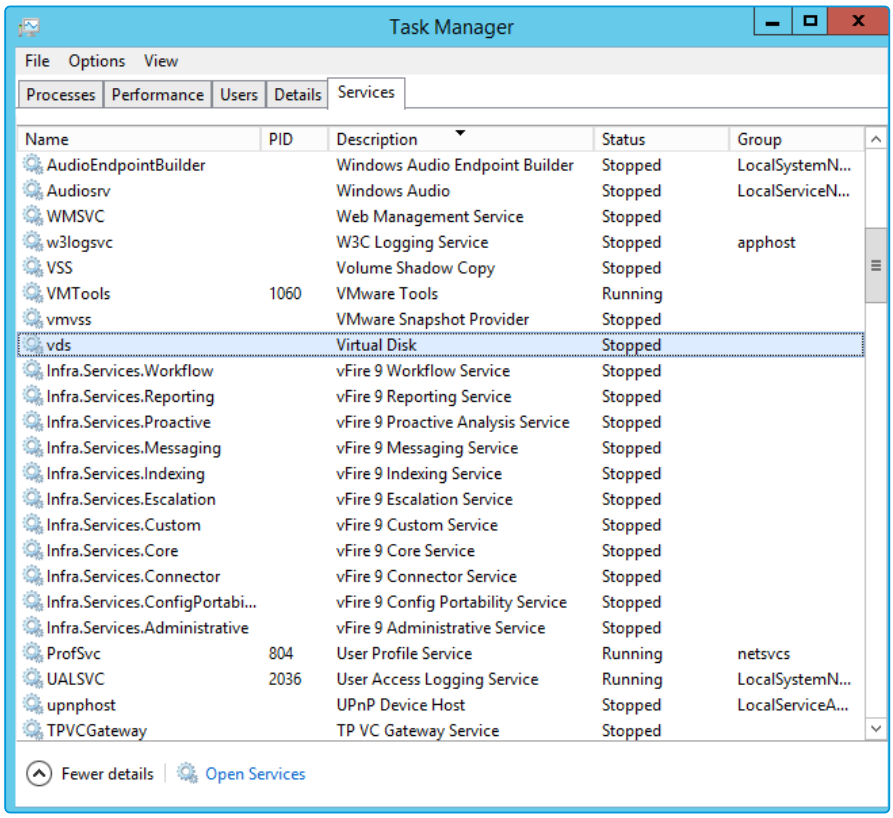


18. You will now need to restart the vFire Services. To do this, open the **Task Manager** and select the **Services** tab. Scroll down to locate the vFire Services if necessary.



19. Right click and select **start** for each of the vFire services.

Reminder Columns on Calls Outstanding

If you are using reminder columns and are upgrading to 9.6 or above, you will need to remove and re-add them to your column configs after upgrading.

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Search Fields on vFire Self Service Screens

After upgrading, existing Multi Value search fields that reference **External Suppliers**, and existing search fields that reference **SLA**, **OLA**, and **UC Agreements**, may stop working on Self Service submissions screens. These fields need to be removed and re-applied to the screen after the upgrade using **Designer**.

Personalized Column Configurations

Personalized column selections on the following search windows will need to be reconfigured after upgrade. Column selections on these search windows are reset to default as a result of the enhancement in 9.3.0 which extends the Configurable Column and Advanced Search functionality to these searches. Personalized columns will need to be reconfigured after upgrade.

Affected search windows: Organizations, Locations, Subscriber Groups, Contracts, Cost Centers, Jurisdictions, Knowledge Admin, Agreements, Bulletin Administration.

Integration Connectors

Connectors have been updated for vFire Core 9.3. Your existing integration settings will continue to function after upgrading to 9.3, with no additional steps required.

The exception is existing SAM connectors. If you are integrating with SAM, see below to learn more.

All 18 connector files now come included with the vFire Core software, not just the free connectors. There has been no change to the licensing model for connectors. If you want to add a licensed connector to your integration platform, you no longer need to download the files, however you still need to purchase a license key.

SAM Connector

The minimum version of Java required for this integration is **Java 8 *64-bit***. After upgrading to vFire 9.3, follow these steps:

1. Install Java Runtime Environment 8 for 64-bit on the vFire server. You can download JRE from the Java website (Windows x64 version): http://www.oracle.com/technetwork/java/javase/downloads/

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2. Copy the file **Infra.Connector.Ionix.SAM.DomainManager.jar** from the vFire Core application root folder to the folder on the system environment variable CLASSPATH that was set during the initial SAM connector install.

Creating a Backup

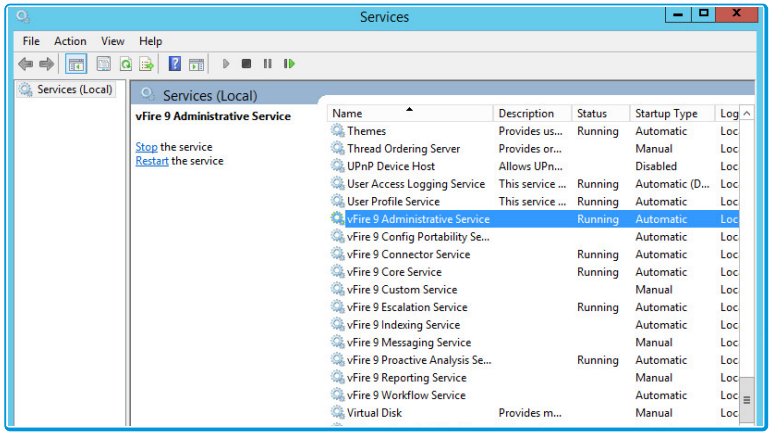
Before upgrading you should create a backup so that the upgrade can be rolled back should the need arise.

For virtual servers

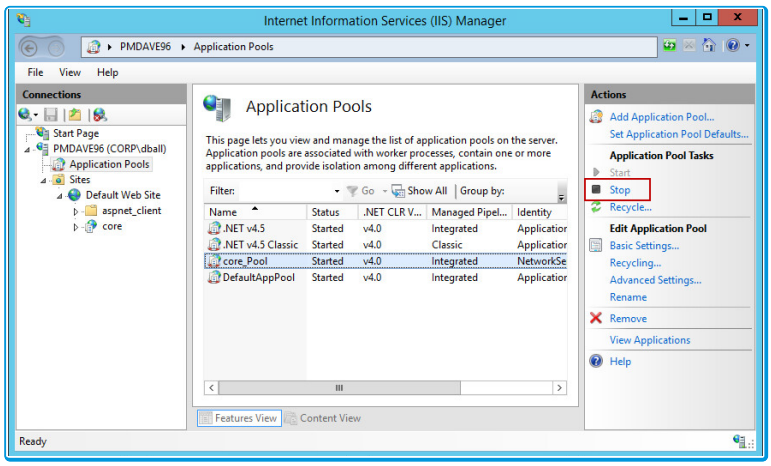
Create a snapshot or backup of the virtual web server and of the virtual database server.

For physical servers

1. Stop the vFire 9 Services. This can be done by stopping the vFire 9 Administration Service.



2. Stop the vFire application pools and websites.



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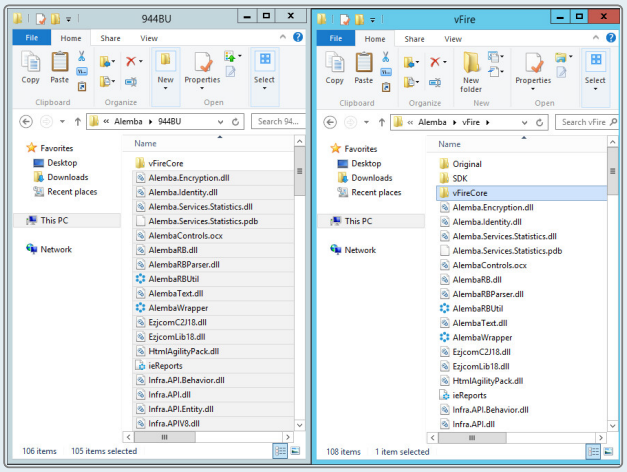
3. Create a backup of the system's database.
4. Create a backup of the vFire registry keys (e.g.: export to file HKEY_LOCAL_MACHINE\SOFTWARE\Alemba\vFireCore)
5. Create a folder in the same location as the extracted zip file and backup the system directory (e.g.: C:\Program Files\Alemba\vFire**System1**) and the files in the **vFire** directory.

eg Create a new folder C:\Alemba\944Backup:



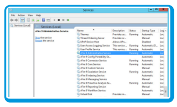
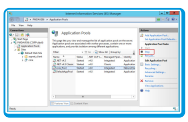
Rolling Back the Upgrade

If you need to rollback the upgrade and return your system to its previous version:

For virtual servers

Restore the web server and database server to the snapshot or backup you took prior to applying the upgrade.

For physical servers

1. Stop all vFire 9 Services. This can be done by stopping the vFire 9 Administration Service. 
2. Stop the vFire application pools and websites. 

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3. Restore the system directory and files from the backup location you created prior to upgrading.
4. Restore the database from the backup.
5. Restore the registry keys from the backup.
6. Restart the vFire 9 services.
7. Restart the vFire website and application pool (IISreset)

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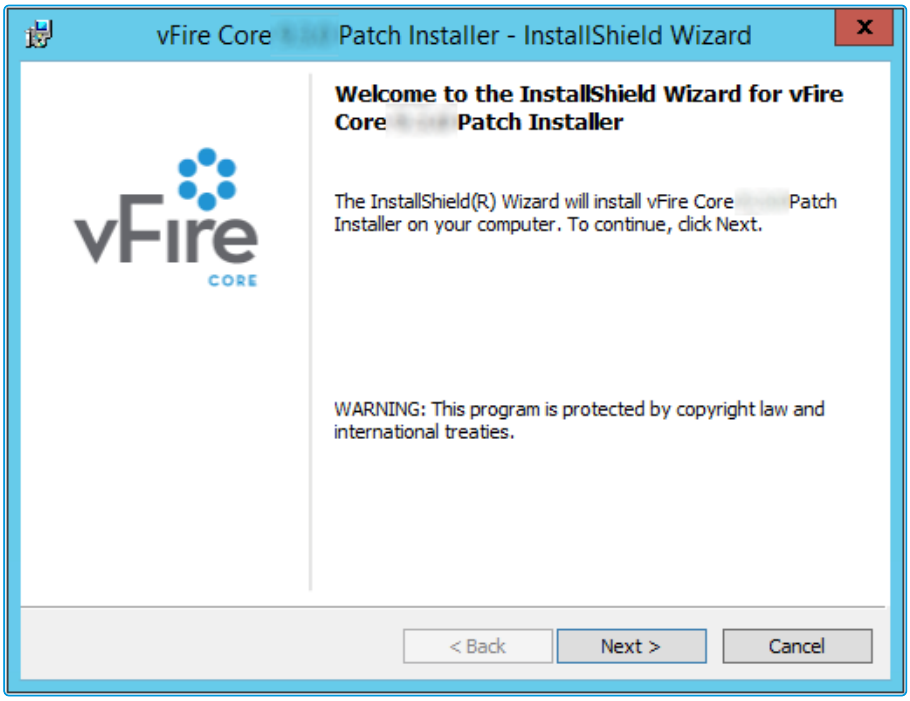
Installing the Patch Tool

Before you can run an upgrade, you have to download the vFire Core Patch Tool and install it on your system.

Before you start

You must have .NET Framework 4.5.2 to install the Patch Tool.

1. Log in to the Alemba website and select the downloads tab. Download **vFireCorePatchxx** (where xx is the appropriate version number).
2. Extract the contents.
3. Copy the **vFireCorePatchxx.msi** file to a temporary location, such as your desktop, and double-click on it to start the Patch Installer wizard.



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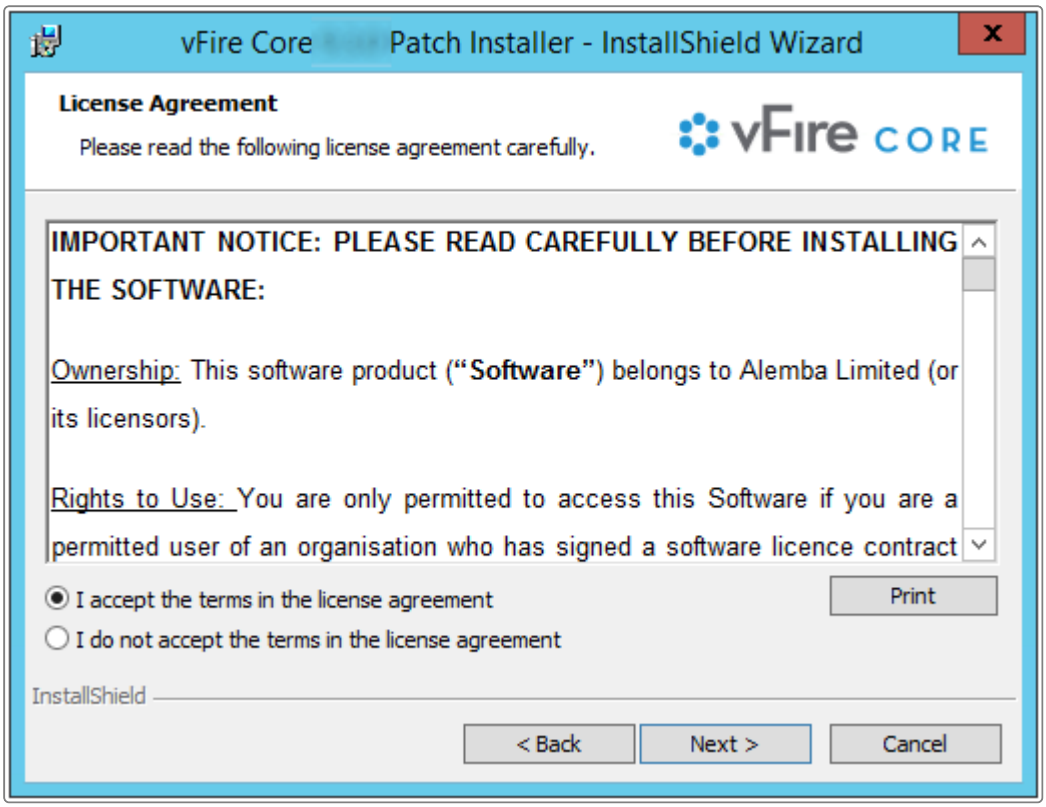
4. The **License Agreement** window is displayed. Read the details and accept the terms, before selecting **Next** to continue.



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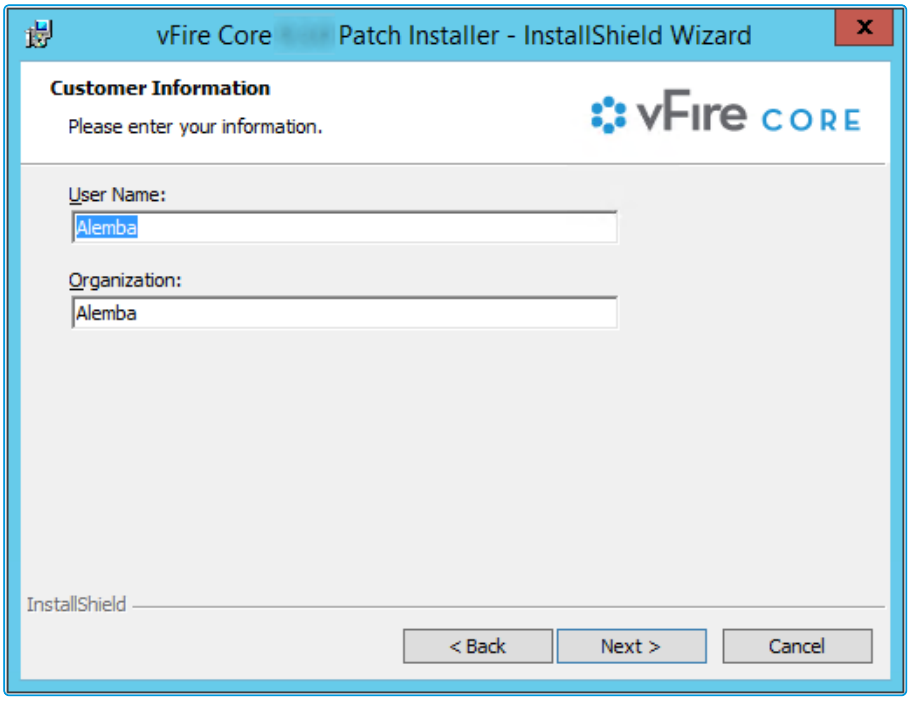
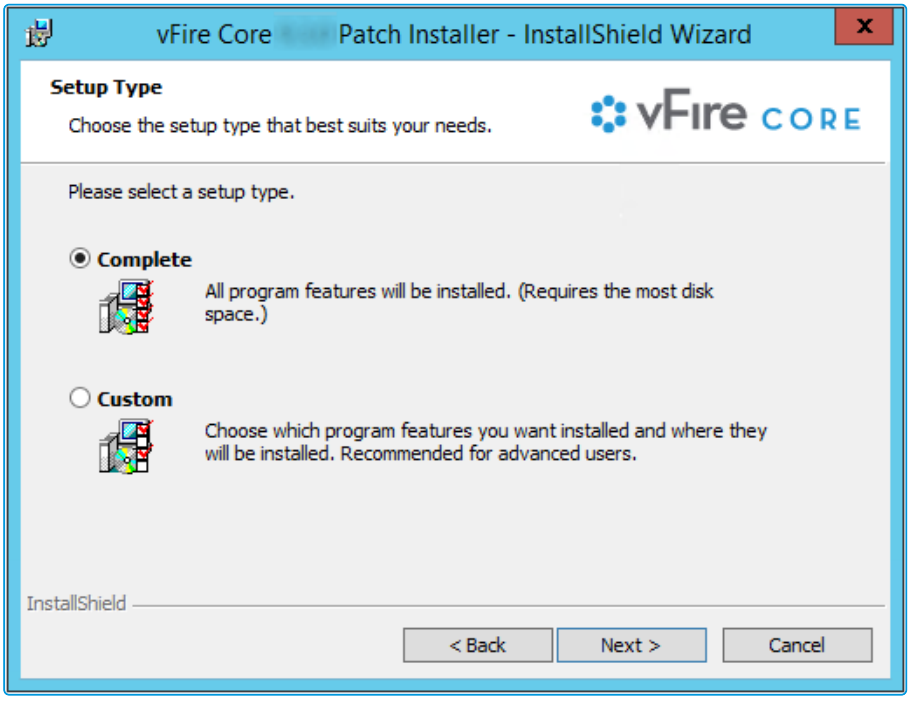
5. On the **User Information** window, enter your name and organization.



6. Select **Next** to continue.
7. On the **Setup Type** window, you can select the type of setup you want.



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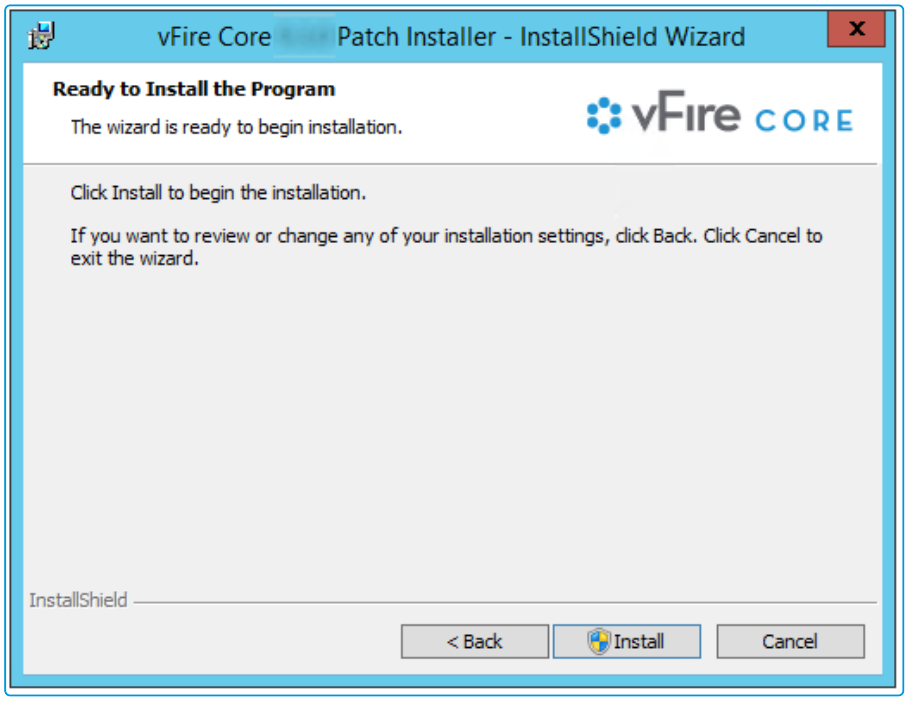
8. Select **Complete** to install the upgrade files in the installation directory. The directory will depend on server configuration and which version was previously installed. An example of an old installation directory would be C:\Program Files (x86)\VMware\Service Manager.

   Select **Custom** to change the directory in which you wish to install the upgrade files.
9. Select **Next** to continue.
10. In the **Ready to Install the Program** window, select **Install**.



11. If you receive a confirmation box, select **Yes** to continue.

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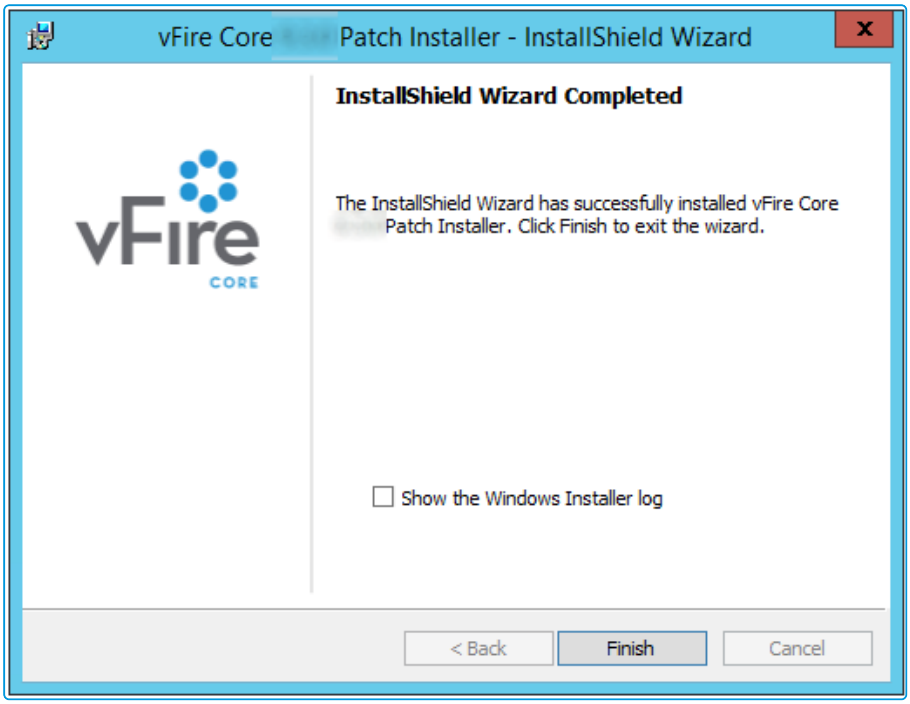
12. Select **Finish** when the installation is complete.



You can now perform a **screen pre-upgrade**, as explained on page 51, and the **full upgrade**, as explained on page 55.

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Screens Pre-Upgrade

You can run a pre-upgrade process that performs part of the upgrade process in advance, making the actual upgrade much faster.

The upgrade process run by the Alemba vFire Patch Tool performs several tasks, covering file replacement and database updates, including on occasion screen design updates. When these apply to multiple screens, and those screens have been modified using the vFire Designer, the upgrade can take a long time. This is due to the complexity of in-place modification of a screen design that is held in a single database field, and the often large number of screens to process. The result may be an extended period of system unavailability while the upgrade is under way.

By performing those screen updates in advance, you can reduce the upgrade time significantly, minimizing down time. The upgraded versions do not override the current screen design, but are stored in a location that is not used by the live system. Analysts and Users can therefore continue to work while the pre-upgrade is performed. All that the full upgrade has to do is swap the old and new screen designs, which is a simple and speedy process.

FAQ

How do I run the pre-upgrade?

When you run the Alemba vFire Patch Tool, you will see a checkbox labeled “Screens pre-upgrade only”. If you check this, the only thing that the upgrade will do is take any modified screens and store an upgraded version of them in a place that does not affect the live system.

If you run the upgrade without this checked, the full upgrade will run, and any pre-upgraded screens will become the active versions of those screens.

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Can I run the pre-upgrade more than once?

You can run the pre-upgrade as many times as you like before running the full upgrade, which is useful if you change the design of a screen after running the pre-upgrade. In this circumstance if you do not re-run the pre-upgrade, the screen will be upgraded during the full upgrade which may increase upgrade time. To bring up the Screens Pre-Upgrade option simply double click on the downloaded patch msi file, when prompted select to Modify the install, and run through the wizard until the Patch Tool window is displayed.

Why can't I see the pre-upgrade option?

Once you have fully upgraded the system, the pre-upgrade option will not be available, as by that point it would have nothing useful to do.

Can I run the pre-upgrade on my live system?

Yes. That is exactly what it has been designed for. All installed files remain unchanged by this process, as do all database tables other than those in which the screen designs are stored. Anyone using the screens being upgraded will not be impacted, as the design in use is not changed by the process. An upgraded copy of that design is simply stored in an unused location in that table.

Can I continue to run the old version of the system after a pre-upgrade has been run?

Yes. The system will continue to behave as before, as the system does not use the location in which the upgraded versions of the screens are stored.

Can I still run the upgrade without using the new pre-upgrade option?

Yes. The upgrade will run exactly as before. You can do this if you don’t mind how long the upgrade takes, or if you only have a few screens that have been modified. Otherwise, you are best advised to run the pre-upgrade first.

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Can I make changes to my screens via the designer once I have run the pre-upgrade?

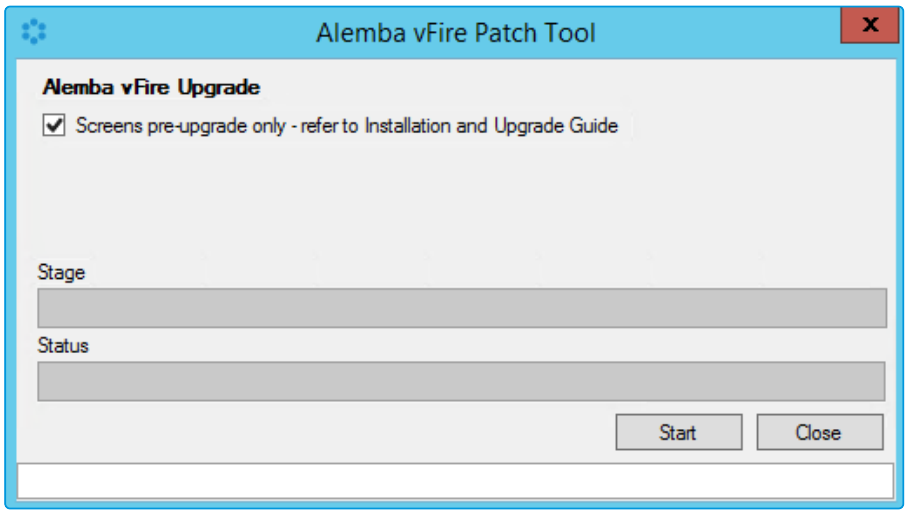
Yes. You may make changes to your screens via the designer once the pre-upgrade has been run. However, you should run the pre-upgrade again in order to save time during the full upgrade.

Before you start

Ensure that your system meets the prerequisites outlined in the **Prerequisites Guide**.

Familiarize yourself with the information in the **Installing or Patching** section, on page 8.

1. **Install the vFire Patch Tool** (page 46). If you have already installed it, simply run through the wizard again.
2. The **Screens Pre-upgrade** window is displayed.



3. Select the **Screens Pre-upgrade** box to run a screen pre-upgrade.

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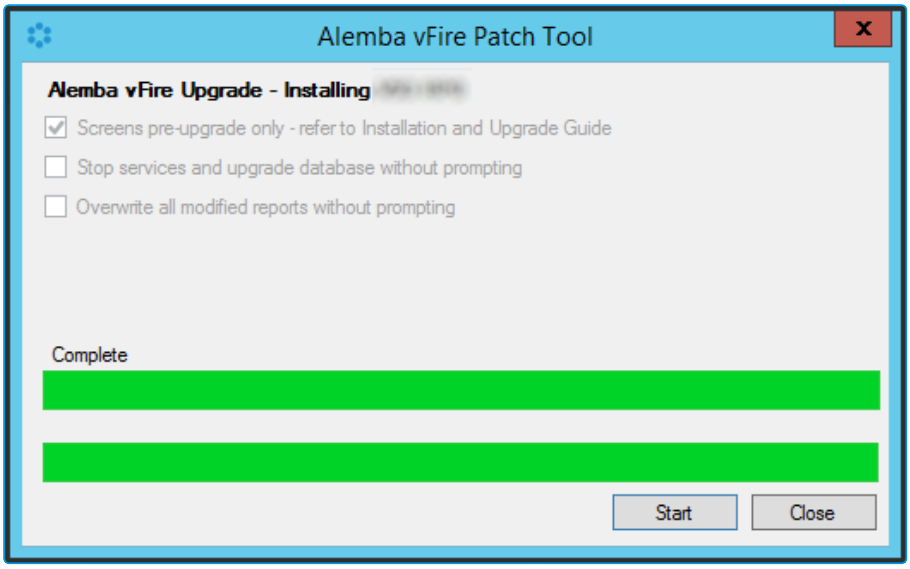
4. The following window is displayed when the pre-upgrade is complete.



5. Now you can either upgrade the system by running the upgrade, as described on page 55, or close the window.

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Running the vFire Patch Tool

Once you have installed the vFire Patch Tool and run the Screens Pre-upgrade, you run the vFire Patch Tool to upgrade your system.

Before you start

Ensure you have created a backup or snapshot, as described on page 43. The Patch Tool **will not** backup your database, system files, or registry keys.

Close the vFire Core Server Console and any other windows on the server, before running the upgrade otherwise errors may occur.

Ensure that your system meets the prerequisites outlined in the **Prerequisites Guide**.

Familiarize yourself with the information in the **Installing or Patching** section, on page 8.

Familiarize yourself with the **Screen Pre-upgrade** feature, as described on page 51.

If you are upgrading from a version lower than 9.2.0, it will invalidate your existing license key. You must have an updated license key to run vFire Core. Contact your Account Manager for more details if necessary.

1. **Install the vFire Patch tool** (page 46). If you have already installed it, simply run through the wizard again.

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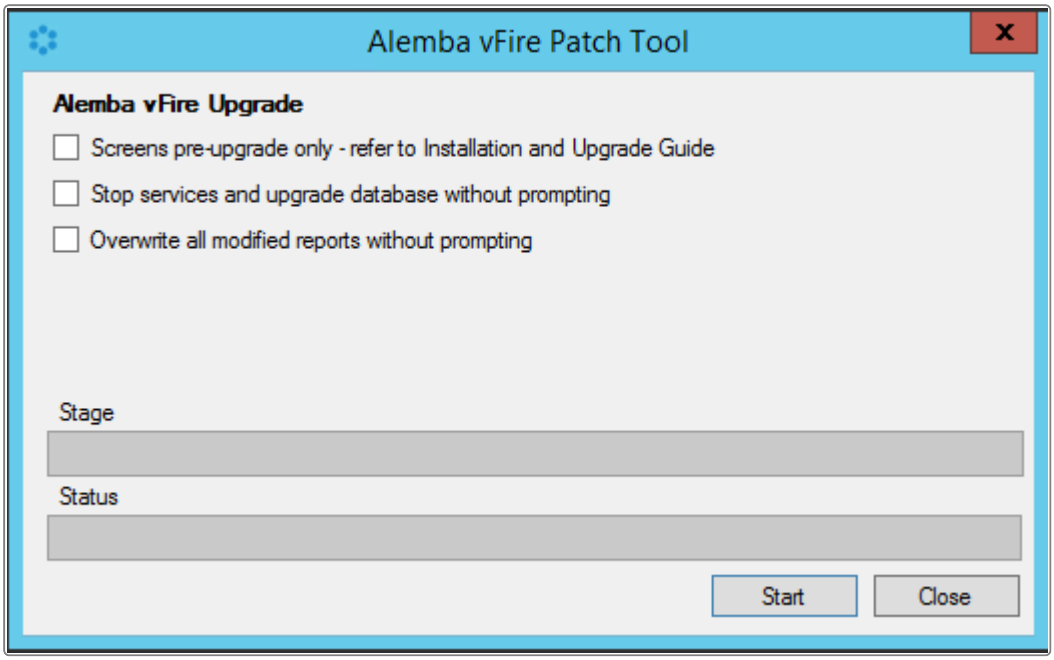
2. The **Alemba vFire Patch Tool** window is displayed.



3. If you want to pre-upgrade your screens in preparation for an upgrade at a later time, select the **Screens pre-upgrade** box. If you have already run the screen pre-upgrade, or do not need one, make sure that this box is unchecked.

> When the **Screens pre-upgrade** checkbox is selected, your system is not upgraded. You can find out more about screens pre-upgrade on page 51.

4. If you want to run the patch tool in silent mode, meaning you will not be prompted for input while the patch tool runs, select the following check boxes:
   - **Stop services and upgrade database without prompting** - if not selected the upgrade will pause and present a prompt requesting permission to stop the **IISAdmin** service and **vFire services**, and later on another prompt asking if you want to upgrade the database. Selecting this check box will automatically select Yes at both prompts.
   - **Overwrite all modified reports without prompting** - if not selected, the patch will pause and present a prompt asking if you want to overwrite modified reports. Selecting this check box will automatically select Yes at this prompt.
5. Select **Start** to commence the upgrade.
6. If you have not selected **Stop services and upgrade database without prompting**, or if you have not already stopped services, you will be prompted to stop **IISAdmin** and **vFire services**. Select **Yes**.

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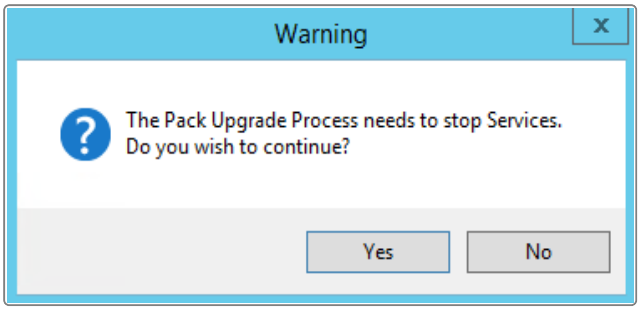
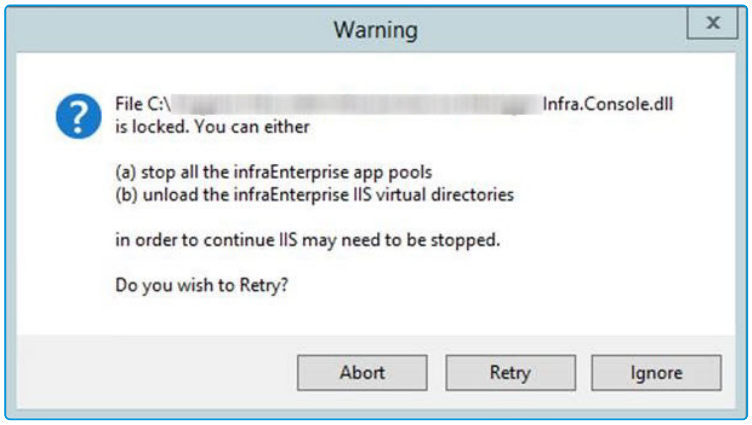


7. If you do not ensure that the console is closed before you begin (as mentioned on page 55), you will see the following warning message, or similar.



   You need to make sure that the Server Console is not in use on that web server (either by the current windows login or another).

8. The patch tool will upgrade the databases. You will receive a confirmation dialog box warning you of this if you have not selected **Stop services and upgrade database without prompting**. Select **Yes** to upgrade the databases. Selecting **No** will cancel the installation process, as the database upgrade is an essential step in the upgrade installation. If you select **No**, you will need to run the process again.
9. The patch tool will update reports that ship with vFire Core. If you have not selected **Overwrite all modified reports without prompting**, or if you have modified the shipped reports, you will be asked whether to overwrite the modified report. Select **Yes** to update and restore the report to default. Selecting **No** will skip the report meaning modifications are retained but the report is not upgraded and therefore may no longer function properly after upgrade.

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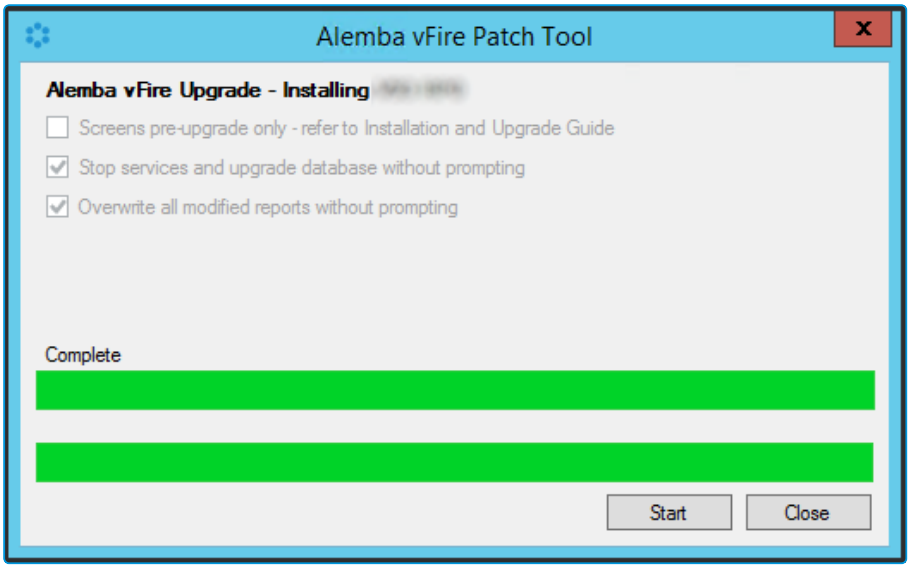
10. Once the upgrade has been completed, you will see the following window.



11. Select **Close** to exit the wizard.

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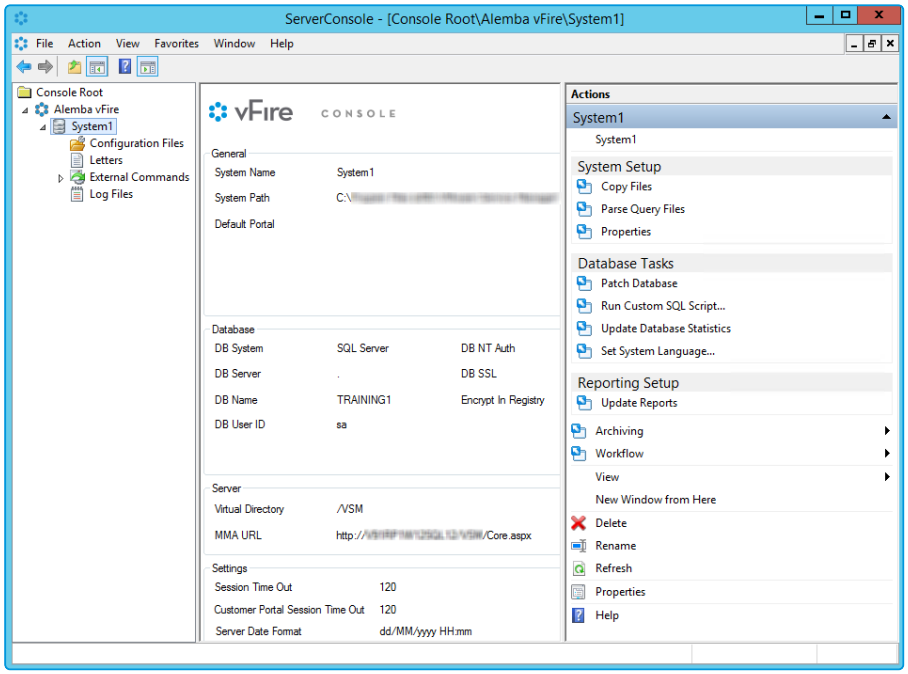
Applying the License Key

If you are applying a patch to a system version lower than 9.2.0, you will need a new license key, which will be provided by Alemba Support or your Account Manager.

1. After the patch is complete, open the Server Console.



2. Select your system name and then select **Properties** from the **Actions** column on the right hand side to open the properties window.
3. Select the **Licence** tab.

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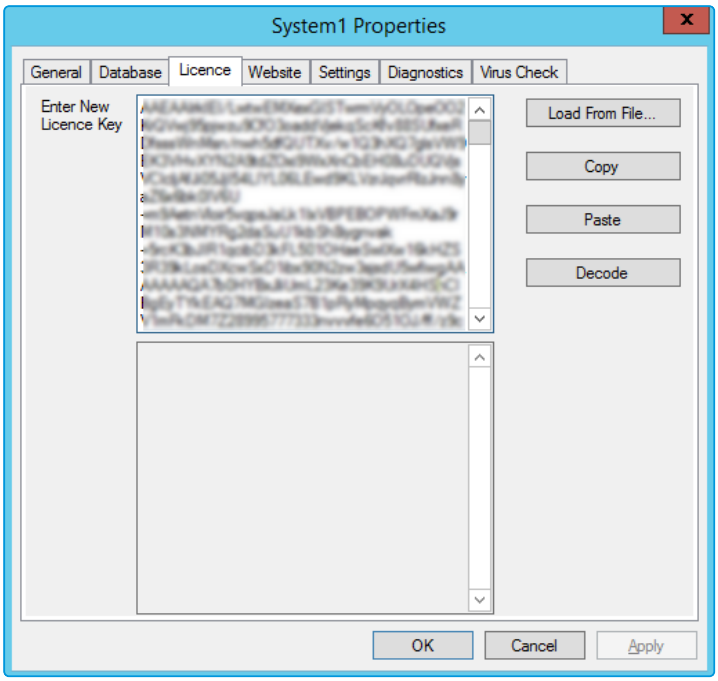

4. Paste the new license key in the box and select **Decode**. Check that the license information is correct, and then select **OK**.

Should the need arise, roll back the upgrade as described on page 55

Upgrading Officer & Portal

You need to ensure that your version of Officer & Portal is compatible with the version of vFire Core. Any version of vFire Core 9.x will be compatible with any 9.x version of vFire Officer & Portal, regardless of the third release digit, unless otherwise stated in the release notes.

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Troubleshooting the Upgrade

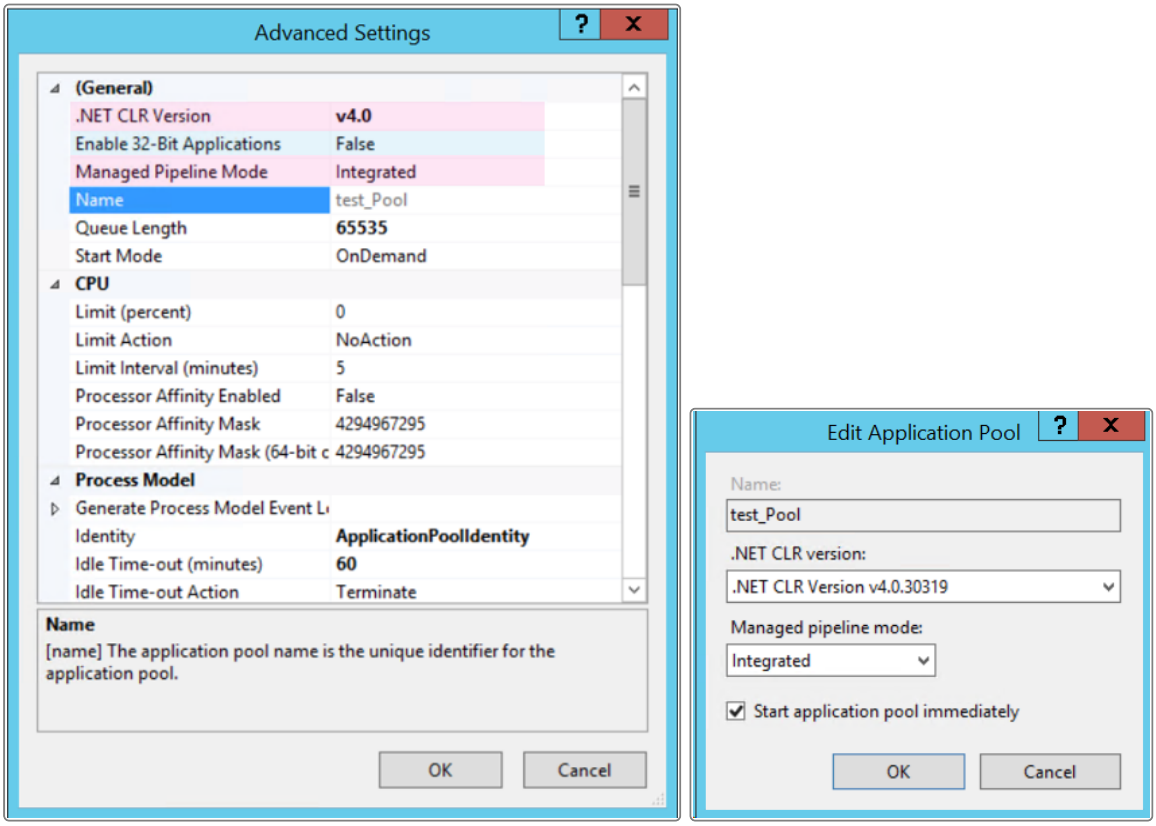
If you have adhered to the prerequisites, your upgrade should go smoothly. However, if you do have difficulties, refer to this section for suggested solutions.

System Crash (Windows Server 2008)

When you upgrade from 9.2.1 or below, the upgrade process should automatically change vFire Core system app pool settings to use .NET 4.5.2 (.NET CLR version **v4.0**) as well as changing the Managed Pipeline Mode to **Integrated**.

When you upgrade from 9.2.3 or below, the upgrade process should automatically change the vFire Core system app pool setting Enable 32-Bit Applications to **False**.

The following settings are correct:



If these settings are incorrect, you need to manually change the **Application Pool** settings in Internet Information Services (IIS) as follows:

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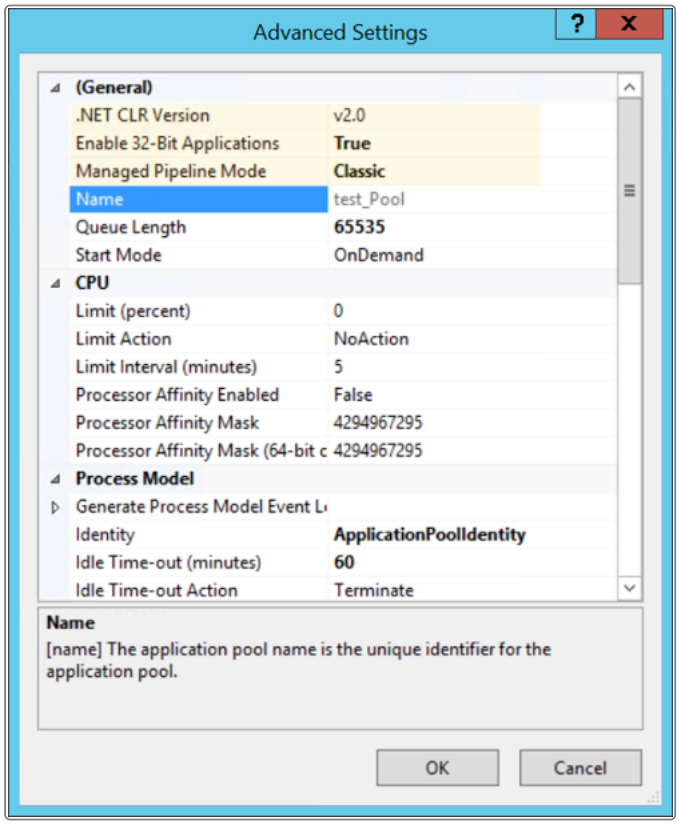
- .NET CLR Version to v4.0
- Enable 32-Bit Applications to False
- Managed Pipeline Mode to Integrated

IIS Errors and Failure to see other Members of Chat

If the Virtual Directory was not correctly created for a System, it will not appear in the vFire Core Server Console or the server registry and therefore the upgrade process cannot change the app pool settings automatically. This will cause the system to crash.

The following settings are incorrect:



Forgotten vFire Self Service Password Settings

The default "Forgotten Password" setting on the vFire Self Service login window in 9.7 is that "Click here for reminder" is displayed. Upgrading your system to 9.7 will reset this setting to this default.

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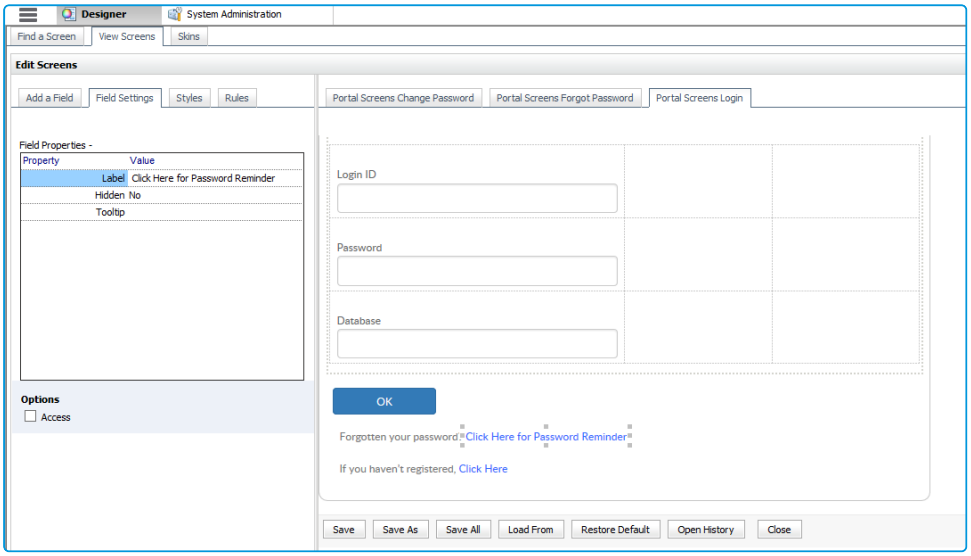
The **Forgot Password** settings were maintained in the **Self Service Settings** window prior to this release. These are now managed in **Designer** by configuring the "Click here for Password Reminder" label in the **Portal Screens Login** screen.



If you choose to hide the link, ensure that you reword the preceding text "Forgotten your password" so that it still makes sense to the user.

Problems with Text Searches

After upgrade, a small number of users may find that text searching does not work correctly and Matching Panel does not return call or KB results based on call description.

Searches that rely on the vFire Indexing Service, such as text searches and Matching Panel, do not return expected results after upgrading.

Symptoms include:

- Text searching in Search screens does not return calls/requests/tasks/KBs created since upgrade.
- Matching Panel does not return call or KB results when filtering by call description text. However, when filtering by call fields only, results are returned.
- The IN_CL_DOCUMENTS table is empty in the vFire database after upgrade
- No results are returned in Call Search when performing a text search using the Logical option

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This occurs under the following conditions:

- The vFire Indexing Service is set to 'Manual' startup and/or was not running at time of upgrade
- The vFire Indexing Service was manually started after upgrade
- The vFire Core system is installed at the file location: <InstallDrive>:\Program Flies\Alemba

This is a known issue in vFire Core 9.3 and above, whereby the vFire Indexing Service does not start properly after upgrading.

To resolve the issue, restart the vFire Indexing Service on the application server where vFire Core is installed.

For further information, refer to the knowledge article KB Ref: 1182.

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The Maintenance Package

From version 9.4.0, you can upgrade between minor point releases (e.g. 9.6.0 to 9.6.2) by applying a **Maintenance Package**, and in doing this you will not need to run through a full patch upgrade process.

> Only use the maintenance package if you are confident of the version you are currently running, and that you are only attempting to complete a minor point upgrade.

> You cannot use the maintenance package to upgrade to 9.7.2, due to the nature of the fixes and enhancements introduced in this release. If you are upgrading from 9.7.2 to a higher release version, you can use the maintenance package as described below.

The steps involved are as follows:

1. Create a backup of the database and system files, or create a snapshot of the virtual servers.
2. **Download** the Maintenance Package from www.alemba.help.

   > You will need to register to access this download.

3. Install the Maintenance Package.
4. Confirm the patch.

If necessary, you can roll back the maintenance package to restore a previous version.

Creating a Backup

Before installing the maintenance package you should create a backup so that the upgrade can be rolled back should the need arise.

For virtual servers

Create a snapshot or backup of the virtual web server and of the virtual database server.

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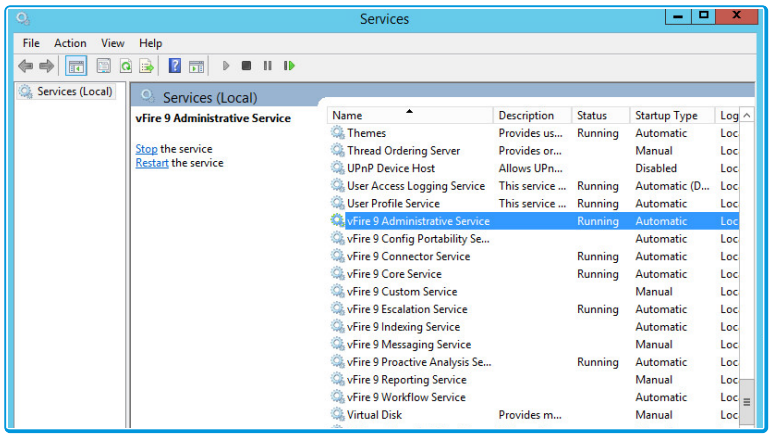
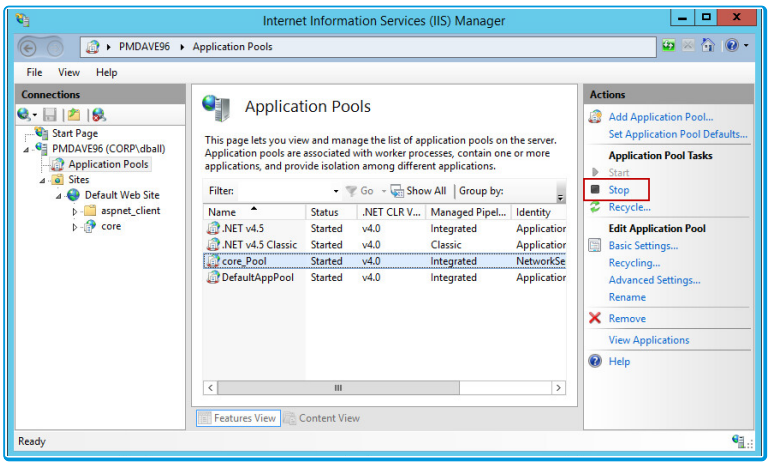
For physical servers

1. Stop the vFire 9 Services. This can be done by stopping the vFire 9 Administration Service.



2. Stop the vFire application pools and websites.



4. Create a folder in the same location as the extracted Maintenance Package and backup the system directory (e.g.: C:\Program Files\Alemba\vFire**System1**) and the

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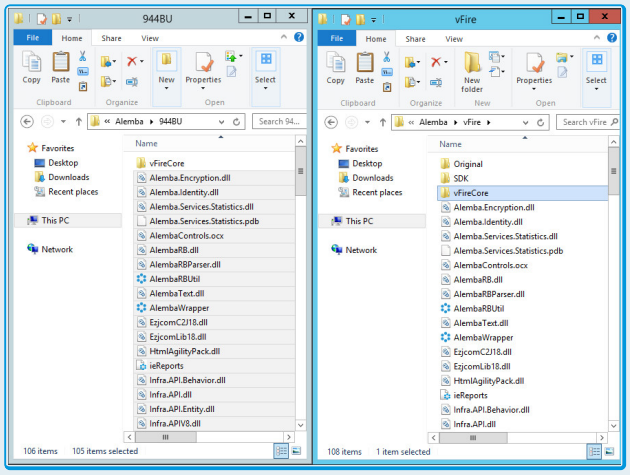
files in the **vFire** directory.

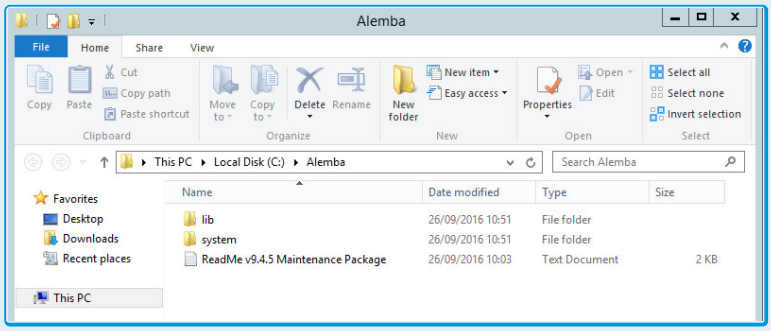
4. Create a folder in the same location as the extracted Maintenance Package and backup the system directory (e.g.: C:\Program Files\Alemba\vFire**System1**) and the files in the **vFire** directory.



Installing the Maintenance Package

You need to download the maintenance package from www.alemba.help.

1. Extract the Maintenance Package to a folder on the Web Server.
2. Create a new folder C:\Alemba.



If you have multiple Web Servers the Maintenance Package will need to be uploaded and extracted to a folder on **each** Web Server.

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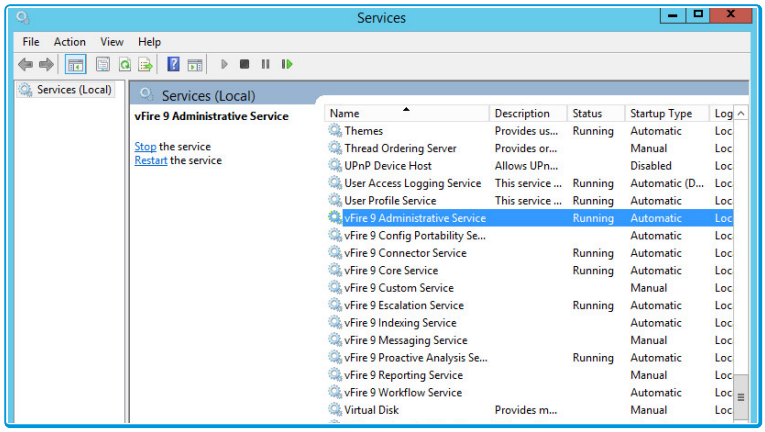
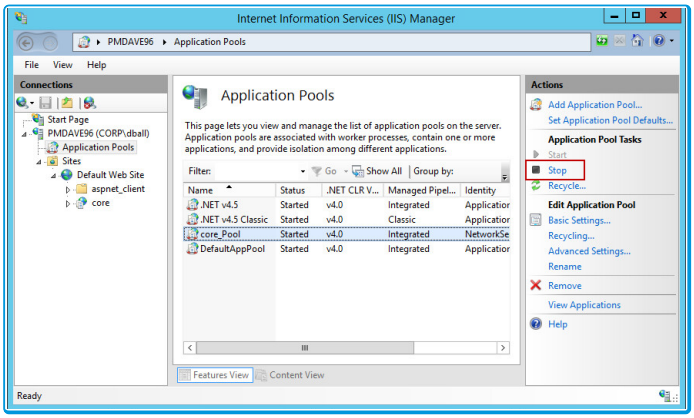
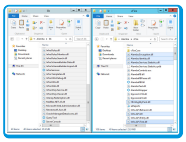
3. **Stop the vFire 9 Services**. This can be done by stopping the vFire 9 Administrative Service.



4. **Stop the vFire application pools and websites**.



5. Copy all files from the **LIB** folder in the Maintenance Package to the **vFire** directory.



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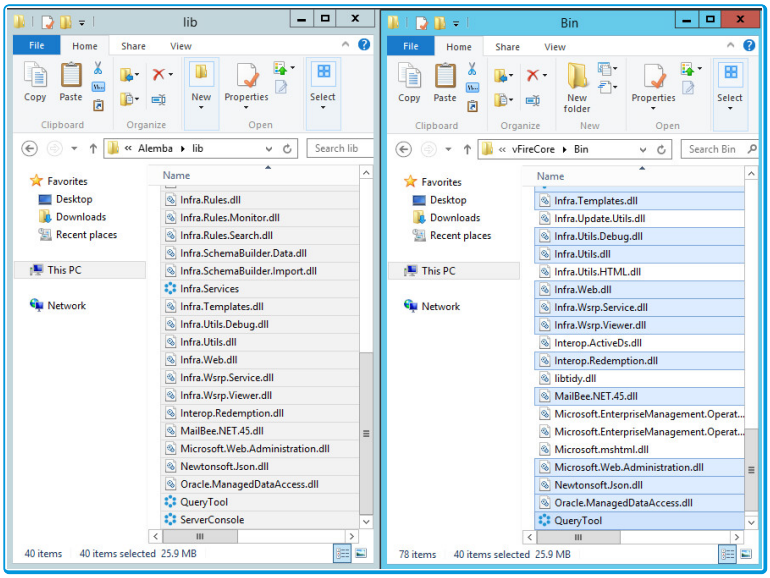
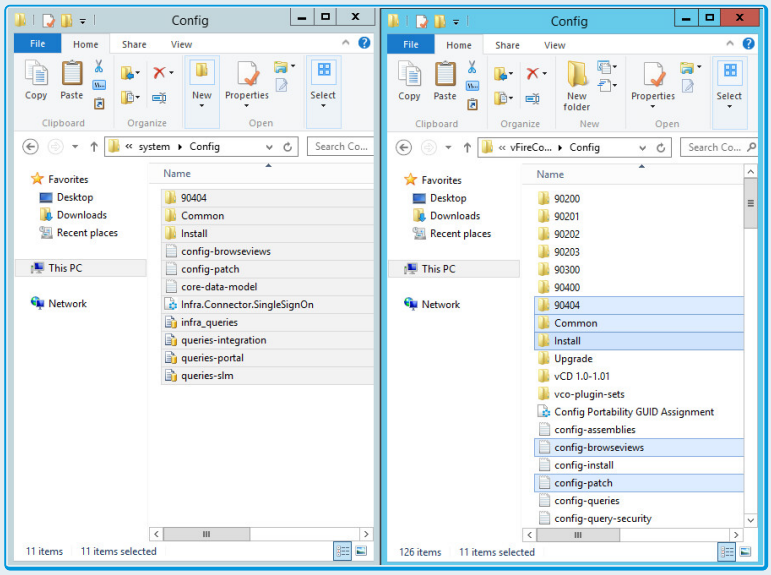
6. Copy all files from the **LIB** folder in the Maintenance Package to the vFire system's **BIN** directory.



7. Within the **System** folder in the Maintenance Package there may be sub folders, such as **Config**, **Search** and so on. Copy all the files and folders from each of these sub folders to the corresponding folders in your vFire system directory.

8. Copy all files from the **System\Config** folder in the Maintenance Package to the **Config** folder of your system directory.



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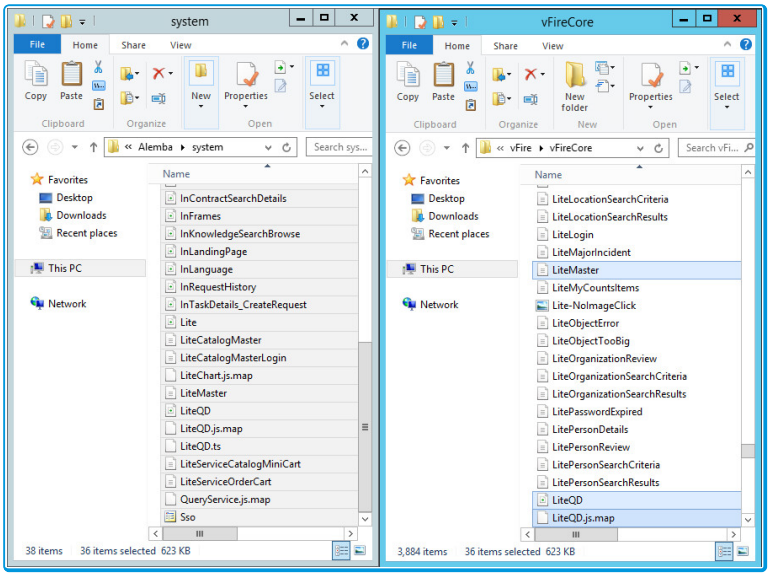
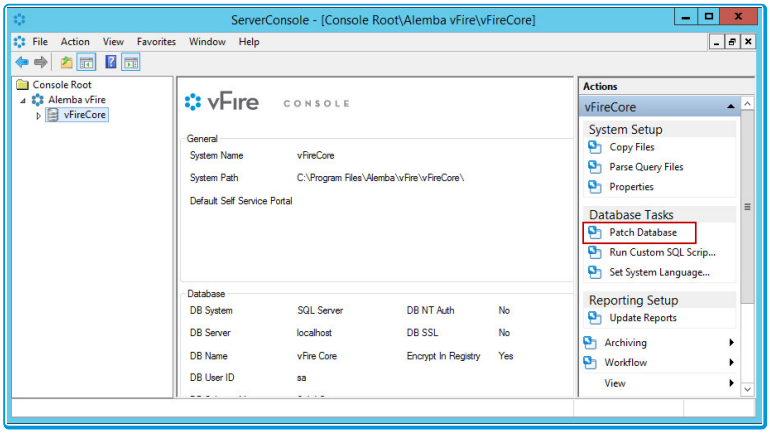
9. Copy all files from the **System** folder in the Maintenance Package to the vFire system directory (e.g.: C:\Program Files\Alemba\vFire**System1**).



This process will only update the files in your **existing** vFire Systems. If you wish to create new vFire Core systems at this patch level you will also need to copy the System sub folders to the **Original** directory.

10. Open the vFire Core Server Console, select the vFire Core System and then run the **Patch Database** Database Task.



If you have multiple Web Servers, you will only need to Patch Database on the first Web Server you apply the Maintenance Package. On each of the other Web Servers in your environment you will need perform Steps 1 to 9, and for Step 10 you need to run the **Parse Query Files** action under **System Setup** actions instead.

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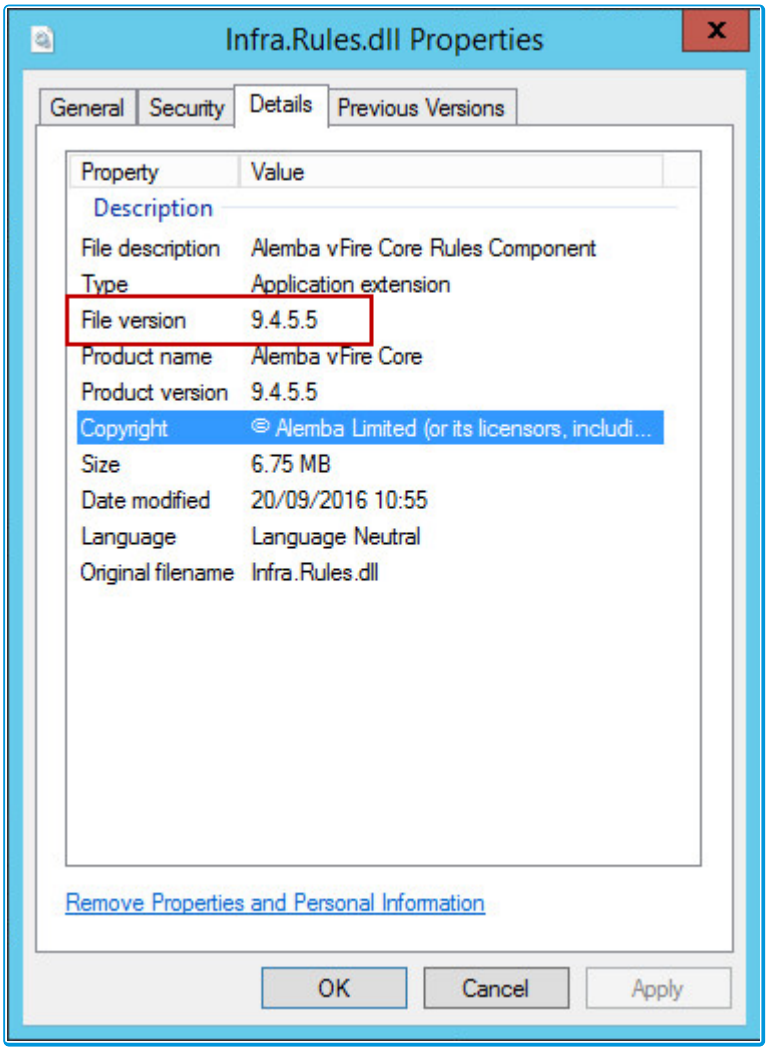
11. Start the vFire 9 Services.
12. Restart the vFire Website and Application Pools (IISreset).
13. Analysts should clear the Local Browser Cache (CTRL+ALT+1).

Next, you need to confirm the patch.

Confirming the Patch

This is the final step in using the Maintenance Package to upgrade between minor point releases.

1. Confirm **System Files** have the correct Version number.



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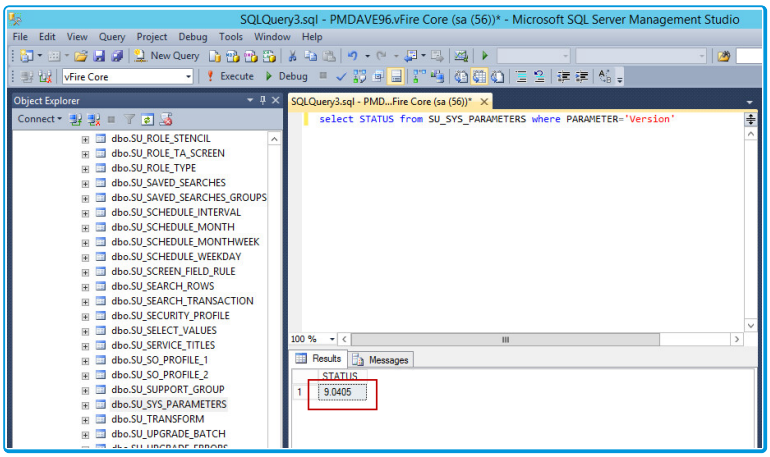
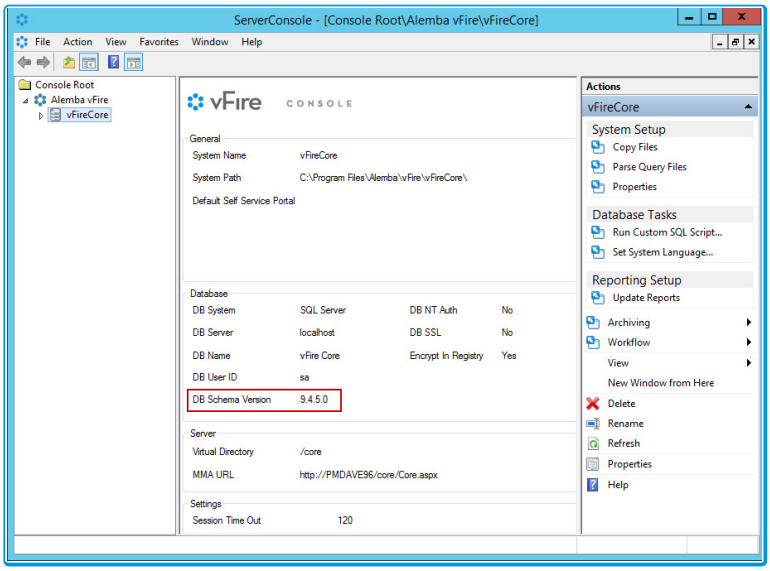
2. Confirm the **Version Number** in the **vFire Core** Database.

```
select STATUS from SU_SYS_PARAMETERS where PARAMETER='Version'
```



3. Confirm the **Server Console** is showing the correct **Schema Version** (may require you to restart the console).



Rolling Back the Maintenance Package

You can roll back the maintenance package and return your system to its previous minor version:

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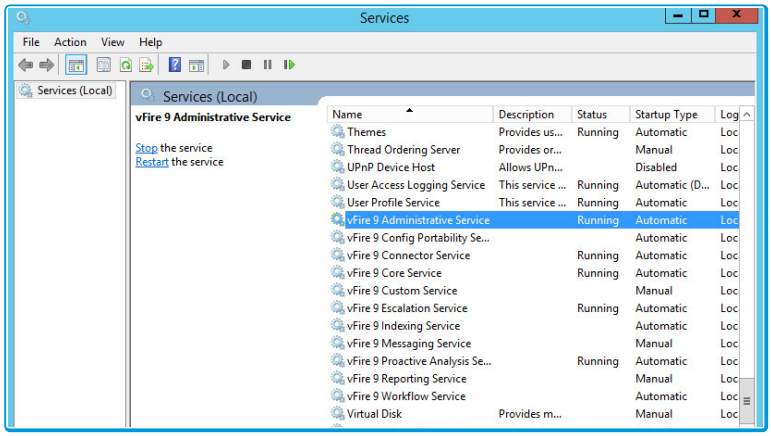
For virtual servers

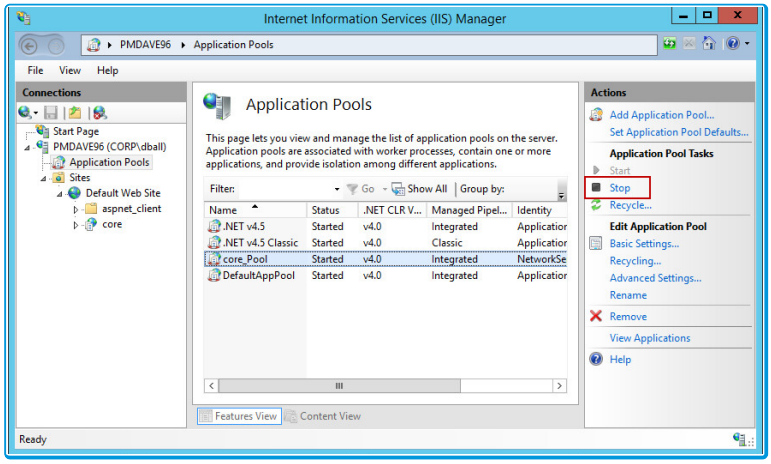
Restore the web server and database server to the snapshot or backup you took prior to applying the maintenance package.

For physical servers

1. Stop all vFire 9 Services. This can be done by stopping the vFire 9 Administration Service.



2. Stop the vFire application pools and websites.



3. Restore the system directory and files from the backup location you created prior to upgrading.
4. Restore the database from the backup you made prior to applying the maintenance package.
5. Restart the vFire 9 services.
6. Restart the vFire website and application pool (IISreset).

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Logging on to vFire Core

You can log onto vFire Core using Internet Explorer 11 (or Internet Explorer 9 if using Windows Vista) from any machine, including the server.

Before you start

You must have installed the system on the server and created a system using the vFire Core Server Console.

vFire Core is designed to be used in **Internet Explorer**. Using other browsers is not recommended and may give unpredictable results.

If you access vFire Core from a client machine with Windows Vista installed, you should enable **Protected** mode on the Internet Explorer settings. This can be done through the option under the Security tab on the Internet Options. Otherwise the vFire Core login page will display behind the Internet Explorer page, and you will have to highlight it by selecting the vFire Core application on the Windows task bar.

vFire Core uses CAB files to download ActiveX controls. Some organizations may not allow CAB files to be downloaded because of Internet Explorer Security Settings. Ensure that the options that relate to file downloads are enabled.

Launching the Application from the Browser

To launch the application from the browser, type your URL as follows:
http://machinename/Virtual Directory/core.aspx

You should...

Replace	with
http	**https** if you have selected **Use SSL** when creating the virtual directory in the vFire Core Server Console
machinename	the domain name or IP address of the web server, load balancer, or publicly accessible website
Virtual Directory	the name of the virtual directory you specified in the vFire Core Server Console

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core.aspx is the name of the page that launches the wrapper executable.

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Downloading CAB Files

vFire Core uses CAB files to download ActiveX controls from the web server. These are self-contained files used for application installation and setup. In a CAB file, multiple files are compressed into one file. Data compression is performed across file boundaries, significantly improving the compression ratio and therefore decreasing download time.

On accessing vFire Core for the first time, Cabinet Files (CAB Files) are downloaded from the web server to the client machine before the Login window appears.

The download folder is held in **C:\<WindowsFolder>\Downloaded Program Files**, where **WindowsFolder** is the folder in which Windows is installed. The name may differ, depending on your version of Windows.

If you are not using the direct MSI installation of client components, the following controls are downloaded:

File Name	Description
AlembaWrapper.cab	This contains an executable that runs on the client machine when you log into vFire Core. The wrapper contains and manages all the browser windows generated from running vFire Core, giving it a self contained desktop application feel. It also removes the reliance on the Internet Explorer browser and associated navigation problems.
AlembaControls.cab	This contains the control elements such as Q/D fields, that are used in the everyday running of the system.

CAB Files are only downloaded the first time you access a page with an ActiveX control due to version control on these files.

When the download is complete, you will be prompted to install the controls.

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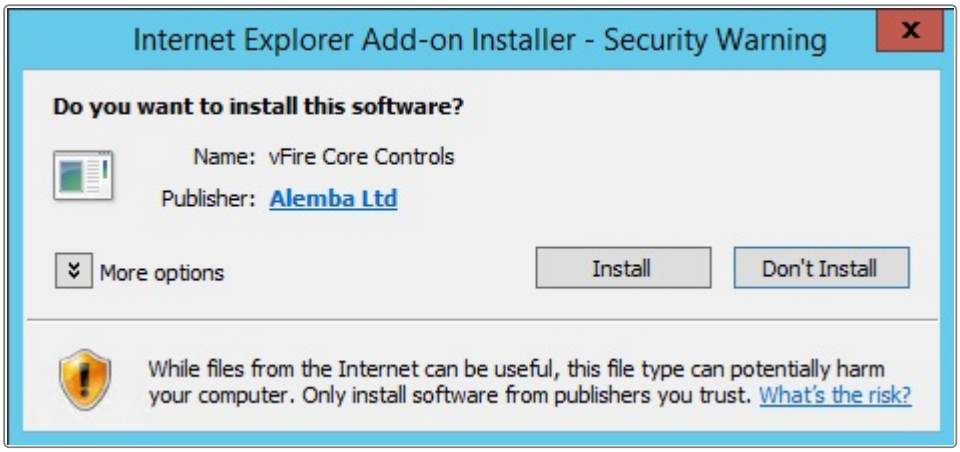
Installing the ActiveX Controls

1. When prompted, select **Install**.
2. Select **Yes** to allow the Microsoft windows to make changes to your computer.



3. When installation is complete, you may be prompted to restart your computer. This is not necessary. If prompted to restart your computer, select No.
4. You will then be prompted to download the vFire Core Wrapper.
5. Select **Yes** to allow the Microsoft windows to make changes to your computer...
6. Select **Install**. When installation of the wrapper is complete, you may again be prompted to restart your computer. This is not necessary. If prompted to restart your computer, select No.
7. When the install is complete, the vFire Core login window appears.

Logging in

In the vFire Core login window, specify your **User Name** and **Password**. If Single Sign On (SSO) is enabled, the login window does not appear and you are logging in automatically.

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Appendix B: Installing Client Components

When you navigate to vFire Core via the URL, the following components are automatically installed on the client machine if they are not found:

- vFire Core Controls
- vFire Core Wrapper

These components are located in the following location:

C:\WindowsFolder\Downloaded Program Files

where **WindowsFolder** is the folder in which Windows is installed. This is named differently in various versions of Windows.

You may choose to install the wrapper and controls from the MSI instead for a number of reasons, including restrictions imposed by your organization security protocols. For more information, see below.

Installing Client Components from the MSI

32-bit MSI

Download the following file from the service catalog in alemba.help -

vFireCoreControls<version number>.msi, where <version number> refers to the software version number.

64-bit MSI

Download the following file from the service catalog in alemba.help -

vFireCoreControls<version number>x64.msi, where <version number> refers to the software version number.

Installing the 64-bit version will also install the 32-bit version.

If you are working in Windows 8 or 10, you will always use the 64-bit wrapper and controls. If you are working in Windows 7, you will use the 32-bit wrapper and controls by default. You will need to create a shortcut to the 64-bit wrapper if you wish to use it.

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Removing Client Components

Occasionally it may be necessary to reinstall the Wrapper and Controls if, say a new Wrapper or Control update has been released, or your current Wrapper or Control becomes corrupted and needs reinstalling.

This applies to automatic installs. If you have installed using the MSI, simply uninstall the program in the normal way.

Unregistering the wrapper

1. Select the Windows Start button. On the **start** page, type **cmd** to bring up the command prompt icon.
2. Select the command prompt icon to open the command prompt window.
3. Type the following command:

   ```
   cd C:\Windows\Downloaded Program Files\
   ```

   Your downloaded Program Files may be stored in a different location than 'Windows'. Ensure that the command above points to the correct folder.

4. Type the command:

   ```
   AlembaWrapper.exe -UNREGSERVER
   ```

Unregistering the controls

1. Select the Windows Start button. On the **start** page, type **cmd** to bring up the command prompt icon.
2. Select the command prompt icon to open the coregmmand prompt window.
3. Type the following command:

   ```
   cd C:\Windows\Downloaded Program Files\
   ```

   Your downloaded Program Files may be stored in a different location than 'Windows'. Ensure that the command above points to the correct folder.

4. Type the command:

   ```
   regsvr32 /u AlembaControls.ocx
   ```


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   ```
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1. Select the Windows Start button. On the **start** page, type **cmd** to bring up the command prompt icon.
2. Select the command prompt icon to open the coregmmand prompt window.
3. Type the following command:

   ```
   cd C:\Windows\Downloaded Program Files\
   ```

   Your downloaded Program Files may be stored in a different location than 'Windows'. Ensure that the command above points to the correct folder.

4. Type the command:

   ```
   regsvr32 /u AlembaControls.ocx
   ```


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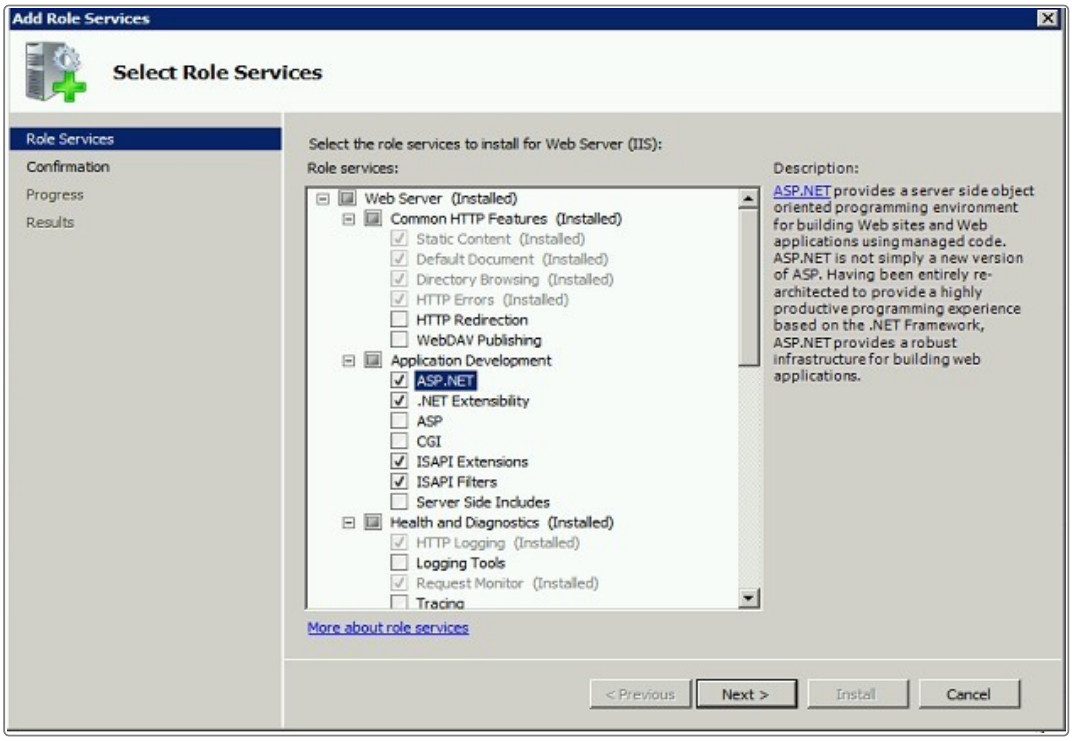
Appendix C: Adding ASP.NET to Windows 2008

If you are using Windows 2012, you should follow the instructions in the Installation Procedure section of this document, when adding ASP.NET. Follow the instructions below if using Windows 2008.

Adding ASP.NET Role Service

To add ASP.NET as a role service to your Windows Server 2008 machine:

1. Select Windows Start > Control Panel > Administrative Tools > Server Manager. The Server Manager window appears.
2. Select Server Manager > Roles > Web Server > Add Role Services. The Add Role Services window appears.



3. Select **Web Server > Application Development > ASP.NET**.
4. Select **Next** to complete adding the role service.

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Further Information

Product Information and Online Support

For information about Alemba products, licensing and services, visit **www.alemba.com**.

For release notes and software updates, go to www.alemba.help.

Up-to-date product documentation, training materials and videos can be found at www.alemba.help/help.

You may need to register to access some of these details.

Technical Support

For technical support, please visit: **www.alemba.com** and select the **vfire support** link. You will need to log in to the alemba self service portal to contact the Alemba Service Desk.

Comments and Feedback

If you have any comments or feedback on this documentation, submit it to info@alembagroup.com.

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