

# Protean 7.4 Upgrade Guide

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## Outline

The time taken to upgrade Protean will primarily depend on your company's IT infrastructure setup. The following steps **must** be completed for a successful Protean upgrade.

- All Engineer Protean mobile apps should be refreshed (if being used) and not be used until the upgrade is complete
- The SQL Data Upgraded
- Protean Clients updated
- Web Services updated

*\*\*Note: Before beginning the upgrade process all users should be logged out of Protean. This can be checked through System - Security - Users Logged On. All PDA engineers should ensure they have done a manual refresh before also logging out of the Protean mobile app software.\*\**

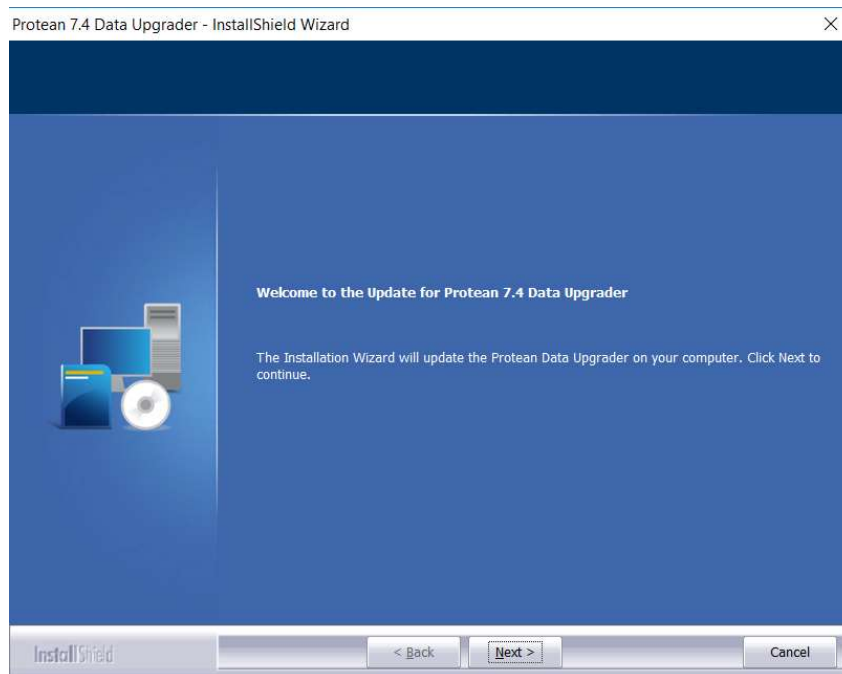
## Upgrading the Protean Database

To upgrade the Protean Database, you will need to:

1. Download the install files package from - <https://support.proteansoftware.com/home/download/>  
(Password to enter download page: PrOt34n)
2. Unzip the install file folder which will be named with the version number you are installing. You will then be presented with a window showing the following files and folders:

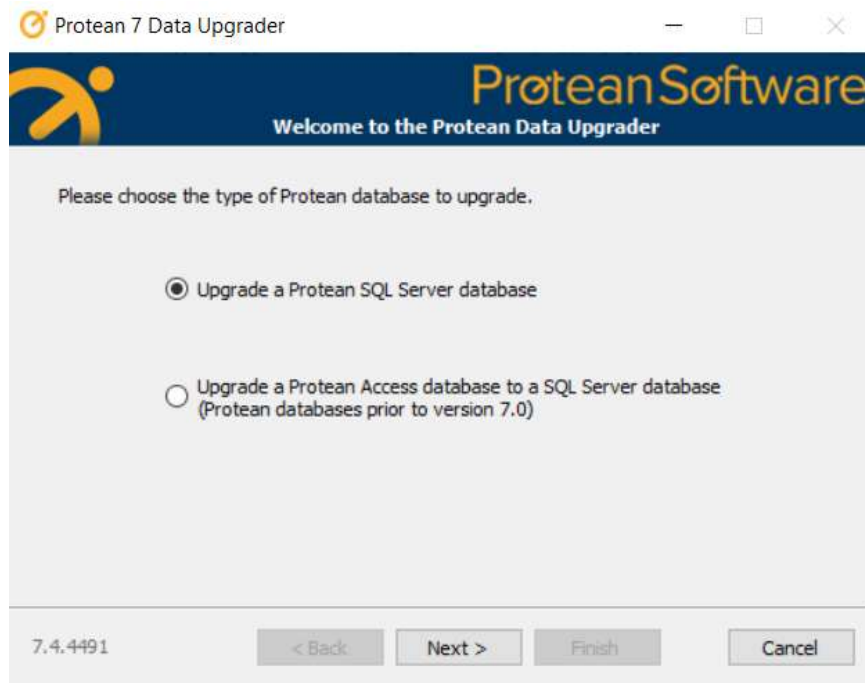
	Access365Runtime	02/06/2020 13:27	File folder	
	Access2016Runtime	02/06/2020 13:27	File folder	
	BackupScripts	02/06/2020 13:27	File folder	
	ISSetupPrerequisites	02/06/2020 13:45	File folder	
	ProteanClientSetup (Click-to-Run)	02/06/2020 13:36	Application	24,226 KB
	ProteanClientSetup	02/06/2020 13:32	Application	25,258 KB
	ProteanDataUpgraderSetup	02/06/2020 13:45	Application	7,369 KB
	ProteanWebServicesSetup	02/06/2020 13:43	Application	37,234 KB

3. You will need to start by upgrading your Protean SQL database, double click onto the **'ProteanDataUpgraderSetup'** file. This will then start the process for the Data upgrader:

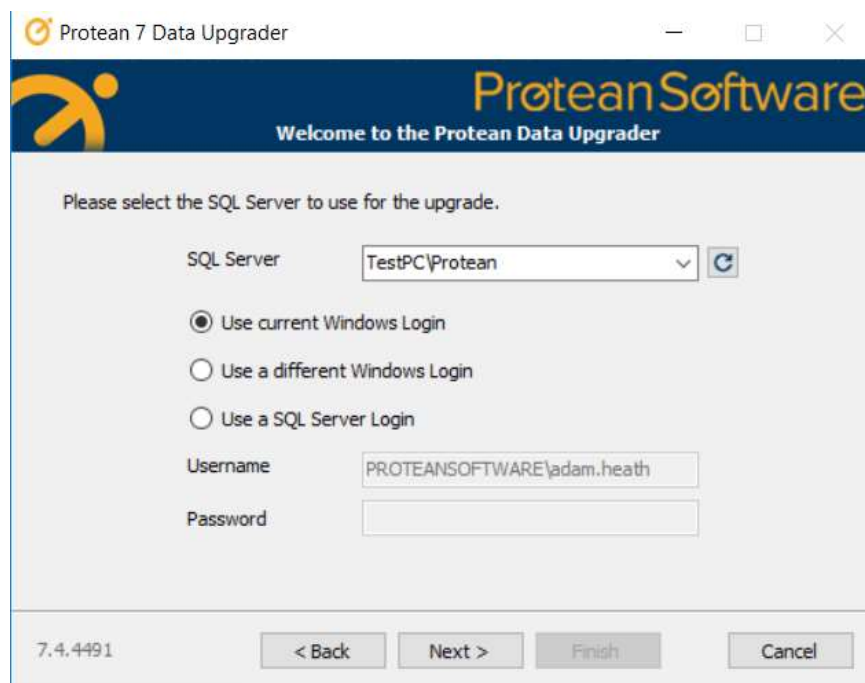


4. Click Next and allow the upgrader to install, the system will then inform you that "The Protean Data Upgrader has been successfully updated"
5. Ensure the "Start the Protean Data Upgrader" is checked and click Finish

- The Data Upgrader will now start. Click Next and you will then get to choose which type of Protean database to upgrade. Select 'Upgrade a Protean SQL Server database' and click Next:



- Enter the SQL server where the database is located and select how to connect to the Database.  
*\*\*Note: You need to be logged into a windows account with access to connect and make changes the SQL server, alternatively you can select use "SQL Server Login" and use the SA account.\*\**




8. Select the SQL Database name from the drop-down list that you want to upgrade.
9. Click Next and the upgrade process will begin. Once the process is complete, you will receive the following screen:



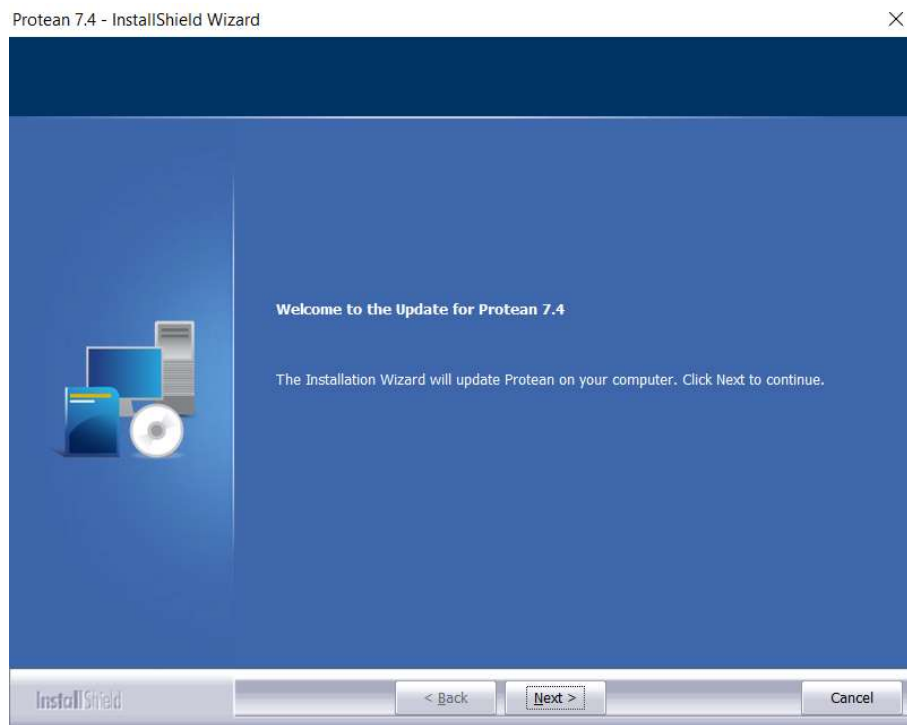
## Upgrading the Protean Workstations/Clients

Protean is setup on a standalone basis or via terminal services. For standalone Protean the client must be updated on every workstation, for terminal services the client must be updated on the Terminal Server itself.

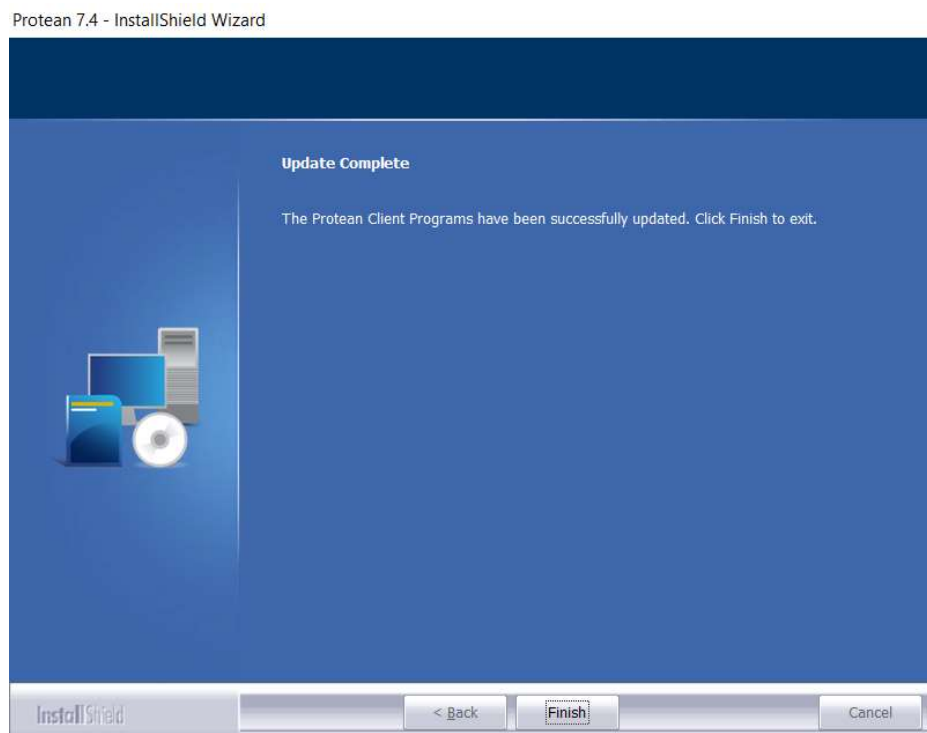
1. Locate the files that have been downloaded for the install. These will need to be in a location which all machines will have access to.
2. You will then be presented with a window showing the following files and folders:

 Access365Runtime	02/06/2020 13:27	File folder	
 Access2016Runtime	02/06/2020 13:27	File folder	
 BackupScripts	02/06/2020 13:27	File folder	
 ISSetupPrerequisites	02/06/2020 13:45	File folder	
 ProteanClientSetup (Click-to-Run)	02/06/2020 13:36	Application	24,226 KB
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 ProteanWebServicesSetup	02/06/2020 13:43	Application	37,234 KB

3. If you are running Microsoft Office 365 you will need to run the '**ProteanClientSetup (Click-to-Run)**' setup file, if you are **NOT** using Office 365 please double click on the '**ProteanClientSetup**' file. This will then start the process for the client install:











4. Click Next and then click Install. This will then start the installation process for the client.
5. Once the client installation is complete, you will get the following screen:



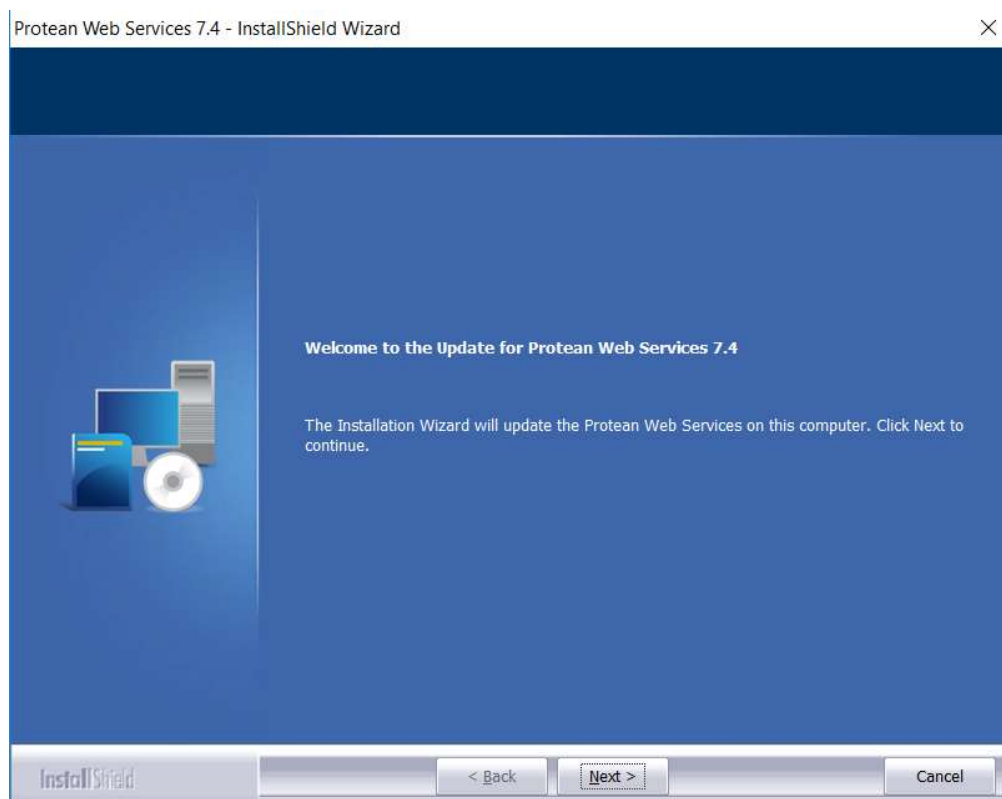
## Upgrading Engineer PDAs

If the company is using the Protean mobile app, customer web portal or SalesApp then the web services will also need to be upgraded. The upgrade will need to be performed on the Web server where the web services are installed.

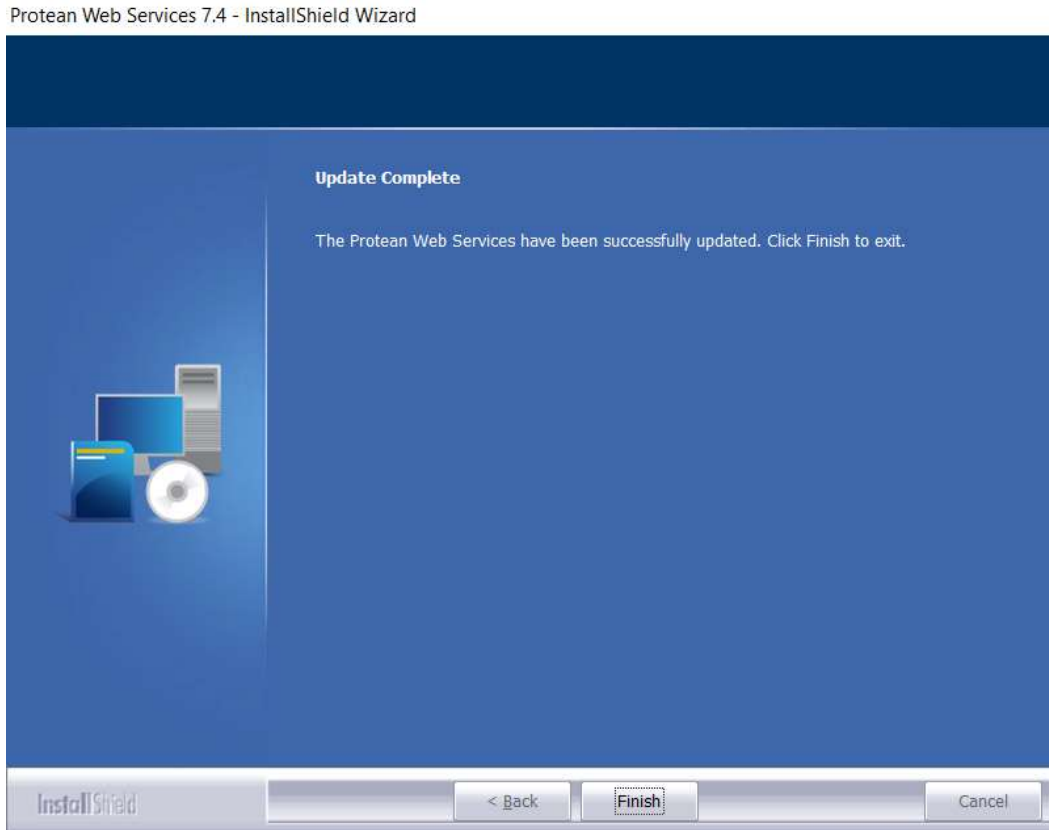
1. Locate the files that have been downloaded for the install.
2. You will then be presented with a window showing the following files and folders:

	Access365Runtime	02/06/2020 13:27	File folder	
	Access2016Runtime	02/06/2020 13:27	File folder	
	BackupScripts	02/06/2020 13:27	File folder	
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	ProteanWebServicesSetup	02/06/2020 13:43	Application	37,234 KB

3. Double click onto the '**ProteanWebServicesSetup**'. This will then start the process for the Web Services upgrade:



4. Click Next and this will then start the upgrade process for you. Once the upgrade is complete, you will get the following screen:



## Protean upgrade completed

You have now successfully updated your Protean system.

If you encounter any issues or require assistance during or following your Protean upgrade, please do not hesitate to contact us on;

02476710310

[support@proteansoftware.co.uk](mailto:support@proteansoftware.co.uk)

<https://support.proteansoftware.com/submit-a-support-request/>