

Protean 7.4 Upgrade Guide

Outline

The time taken to upgrade Protean will primarily depend on your company's IT infrastructure setup. The following steps <u>must</u> 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.

Protean Software

Upgrading the Protean Database

To upgrade the Protean Database, you will need to:

- Download the install files package from -<u>https://support.proteansoftware.com/home/download/</u> (Password to enter download page: Pr0t34n)
- 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
Sector ProteanClientSetup	02/06/2020 13:32	Application	25,258 KB
🔩 ProteanDataUpgraderSetup	02/06/2020 13:45	Application	7,369 KB
RroteanWebServicesSetup	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



6. 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:

🕜 Protean 7 Data U	J <mark>pg</mark> rader		100	-	×
2	Welcome to t	Pro he Protean Da	teanS	Softw	vare
Please choose the	type of Protean databa	ase to upgrade.			
۵ ب	lpgrade a Protean SQL S	Server database			
Ou	lpgrade a Protean Acces Protean databases prior	as database to a to version 7.0)	SQL Server data	base	
7.4.4491	< Back	Next >	Finish	Ca	ancel

7. 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.

🧭 Protean 7 Data Upgra	ader	Pi	rotean	Sø	ftwa	× are
Please select the SQL S	Server to use	for the upgrade.	Data Opgraue	~ (3	
 Use Use Use 	current Wind a different V a SQL Serve	dows Login Windows Login er Login				
Usernar Passwoi	ne rd	PROTEANSOFTW	ARE\adam.heath			
7.4.4491	< Back	Next >	Finish		Cano	el



- 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:

🕑 Protean 7 Data Upgra	ader			3 22		\times
N	Welcome t	Pr to the Protean	Otean Data Upgrader	Se	oftw	are
The Database has bee You must now upgrade on each PC. If you use the Enginee also upgrade them usir	n successfully u the Protean Cl r mobile app, Ci ng the Protean N	ipgraded. ient Programs fro ustomer Web Acc Web Services Ins	m the Protean Se ess or Sales App taller.	etup pro	ogram ou must	
7.4.4491	< Back	Next >	Finish		Can	cel

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:

02/06/2020 13:27	File folder	
02/06/2020 13:27	File folder	
02/06/2020 13:27	File folder	
02/06/2020 13:45	File folder	
02/06/2020 13:36	Application	24,226 KB
02/06/2020 13:32	Application	25,258 KB
02/06/2020 13:45	Application	7,369 KB
02/06/2020 13:43	Application	37,234 KB
	02/06/2020 13:27 02/06/2020 13:27 02/06/2020 13:27 02/06/2020 13:45 02/06/2020 13:36 02/06/2020 13:32 02/06/2020 13:45 02/06/2020 13:43	02/06/2020 13:27 File folder 02/06/2020 13:27 File folder 02/06/2020 13:27 File folder 02/06/2020 13:45 File folder 02/06/2020 13:45 Application 02/06/2020 13:32 Application 02/06/2020 13:45 Application 02/06/2020 13:45 Application 02/06/2020 13:45 Application



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:

Protean 7.4 - InstallShield Wizard	×
Welcome to the Update for Protean 7.4 The Installation Wizard will update Protean on your computer. Click Next to continue.	
InstallShield < Back Next > Car	ncel

- 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:

1	Access365Runtime	02/06/2020 13:27	File folder	
1	Access2016Runtime	02/06/2020 13:27	File folder	
1	BackupScripts	02/06/2020 13:27	File folder	
1	ISSetupPrerequisites	02/06/2020 13:45	File folder	
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ć,	ProteanDataUpgraderSetup	02/06/2020 13:45	Application	7,369 KB
ć,	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:

	Update Complete	
	The Protean Web Services have been successfully updated. Click Finish to exit.	
InstallShield	< <u>B</u> ack.	Cancel

Protean Web Services 7.4 - InstallShield Wizard

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 <u>support@proteansoftware.co.uk</u> <u>https://support.proteansoftware.com/submit-a-support-request/</u>

Protean Support