Upgrading K2 smartforms Beta 2 to K2 smartforms 1.0 (4.12165.1.0)

July 18

This document details the steps required to upgrade a K2 smartforms Beta 2 environment to K2 smartforms 1.0 (4.12165.1.0)

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INTRODUCTION

Customers that have been part of the Beta program can now upgrade their K2 SmartForms Beta 2 environments to the released version.

SUPPORTED UPGRADE PATHS

- K2 blackpearl 4.6 with K2 SmartForms Beta 2 (4.12065.1.0)
- K2 blackpearl 4.6.1 with K2 SmartForms Beta 2 (4.12065.1.0)

UNSUPPORTED UPGRADE PATH

- K2 blackpearl 4.6 with K2 SmartForms Beta (4.12065.1.0)
- K2 blackpearl 4.5 with Update KB001390 with K2 SmartForms Beta (4.12065.1.0)
- K2 blackpearl 4.5 with Update KB001420 with K2 SmartForms Beta (4.12065.1.0)

IMPORTANT CONSIDERATIONS

1. There has been a change in the behavior of certain controls such as the dropdown control when the *changed* event in the rule wizard has been used. In Beta 2 the *changed* rule would only execute when there was user interaction, after upgrading the *changed* rule will fire when the items are repopulated or when the control is updated by a rule such as the 'transfers when a load has executed'. For example, in the College Application and Approval scenario found in the documentation the change will be noticed when existing running instances execute. After the upgrade the Form displayed when the worklist item is opened will now display all the Views where previously the Course Detail and Course Fee Structure Views remained hidden as a result of the *changed* event not executing. The workflow needs to be altered to ensure the Form behaves as it would have in Beta 2. These changes have been applied to the example steps in the K2 smartforms 1.0 documentation.
2. In K2 smartforms 1.0 the rule 'Transfer data to a lookup' control has been removed. All Beta 2 Views and Forms that make use of this rule will automatically be updated to use the 'Transfer data' rule to ensure that the Form continues to function as designed. Where custom rules have been created or adapted to populate the lookup (via "populate a list control"), it will be necessary after the upgrade to open the View then click Save or Finish. This will ensure that the View functions as it did in Beta 2.
3. **Known issue**: An error stating "Cannot insert duplicate key in object 'Form.Control_Design'" will be displayed when a List View created in Beta 1 but not edited in Beta 2 is upgraded to K2 smartforms 1.0. If a copy is made of the original View by using the "Save As" option and then the original View is edited the error will occur. The following **workaround** is required:
    a. Delete the 'Saved As' View.
    b. Edit the original View and Finish the wizard. **Note:** It is not necessary to change anything in the View as such, just select Edit and then the Finish button to ensure the View is updated on the new version.
    c. Select 'Save As' to create a new copy of the View.
4. **Known issue:** Creating a new worklist item for a workflow that was created in Beta 1, upgraded to Beta 2 and then upgraded to K2 smartforms 1.0 will result in a blank task form. The following **workaround** is required:
    a. Re-deploy the workflow to fix this issue for any new instances that will be started.

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b. The URL for running instances that were started in Beta 1 must be manually edited and the word "Page" must be replaced with "Form.

5.

6. **Known Issue:** It might occur that after upgrading from Beta 2, two Delete buttons will appear on a List View which will prevent the completion of editing the View.

   Workaround:

   a. Edit the View.
   b. Remove one of the Delete buttons.
   c. Finish the View.

7. **Known Issue:** The body section of a List View that displays data was updated after Beta 2 to return or format data according to data type and not necessarily by the data received. The normal data label's default data type (if unbound) is text, which is why it would try to render a hyperlink as text with the various HTML characters handled as special characters. After upgrading from beta 2 hyperlinks will not display as previously but rather the full HTML will be displayed as plain text.

   Workaround:

   a. Edit the View and change the data type of the data label to "hyperlink",

   or

   b. Drag in an unbound "hyperlink" control, which would do the same as above, but also facilitate a similar looking UI in design time. You can now use this control to either set a default hyperlink value with the control properties or link it to an expression.

8. **Known Issue:** In certain environments after upgrading from Beta 2 to K2 smartforms 1.0 it could happen that when K2 Designer for Visual Studio is opened the Toolbox is empty.

   Workaround:

   Reset the toolbox by right clicking on the Toolbox and selecting Reset Toolbox.

9. **Custom Styles:** In Beta 2 when custom styles/themes were created they were added to the Design time site. In K2 smartforms 1.0 there is now a design time and a runtime site. After upgrading it will be necessary to add the custom css files found in the design time site to the runtime site.

UPGRADE STEPS:

Note: The steps below are based on upgrading a standalone environment. When upgrading a distributed environment only the license and K2 Server database will be displayed as the K2 Setup Manager will use all the existing Beta 2 installation settings.

1. Open the K2 smartforms installation package and run the Setup.exe.
2. The K2 SmartForms Maintenance screen will open, select Upgrade to **K2 SmartForms 1.0 (4.12165.0)** option and click **Next.**

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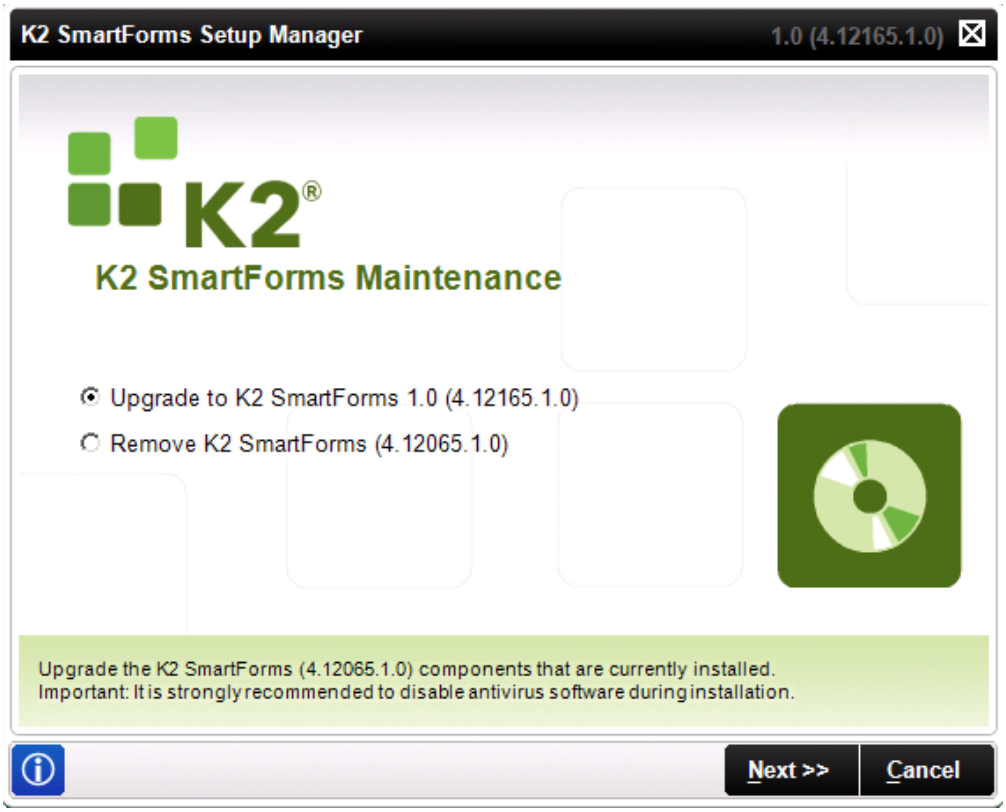
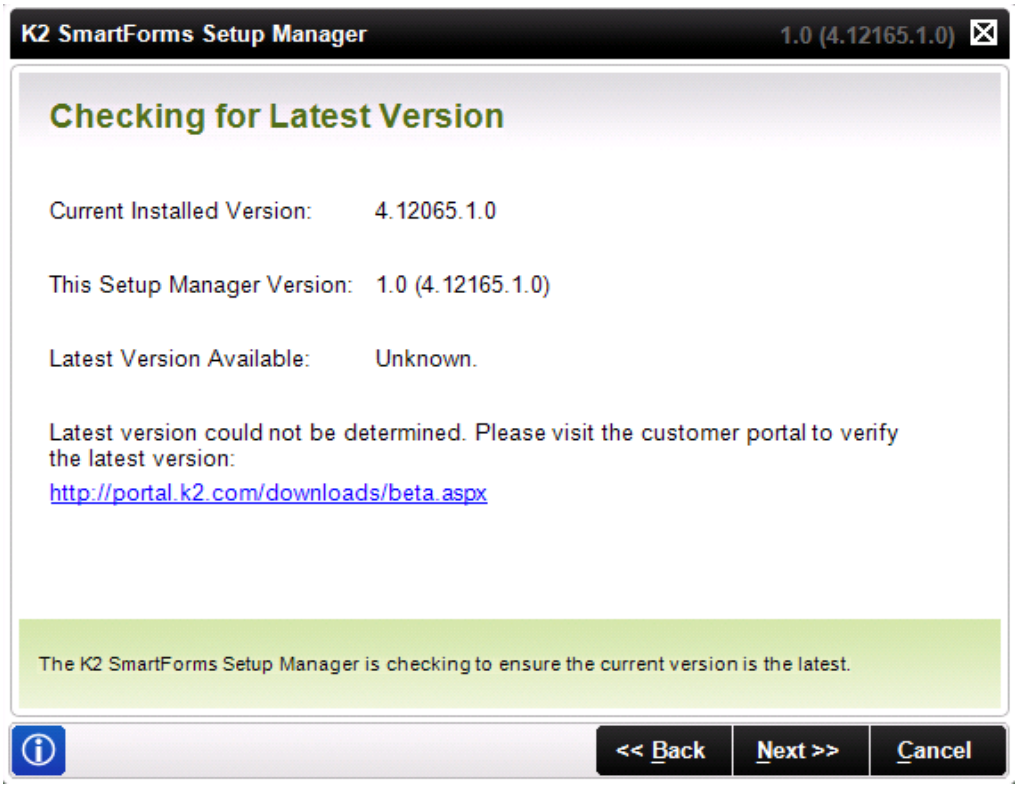


3. Verify that the version to be installed is 1.0 (4.12165.1.0). Click **Next**.



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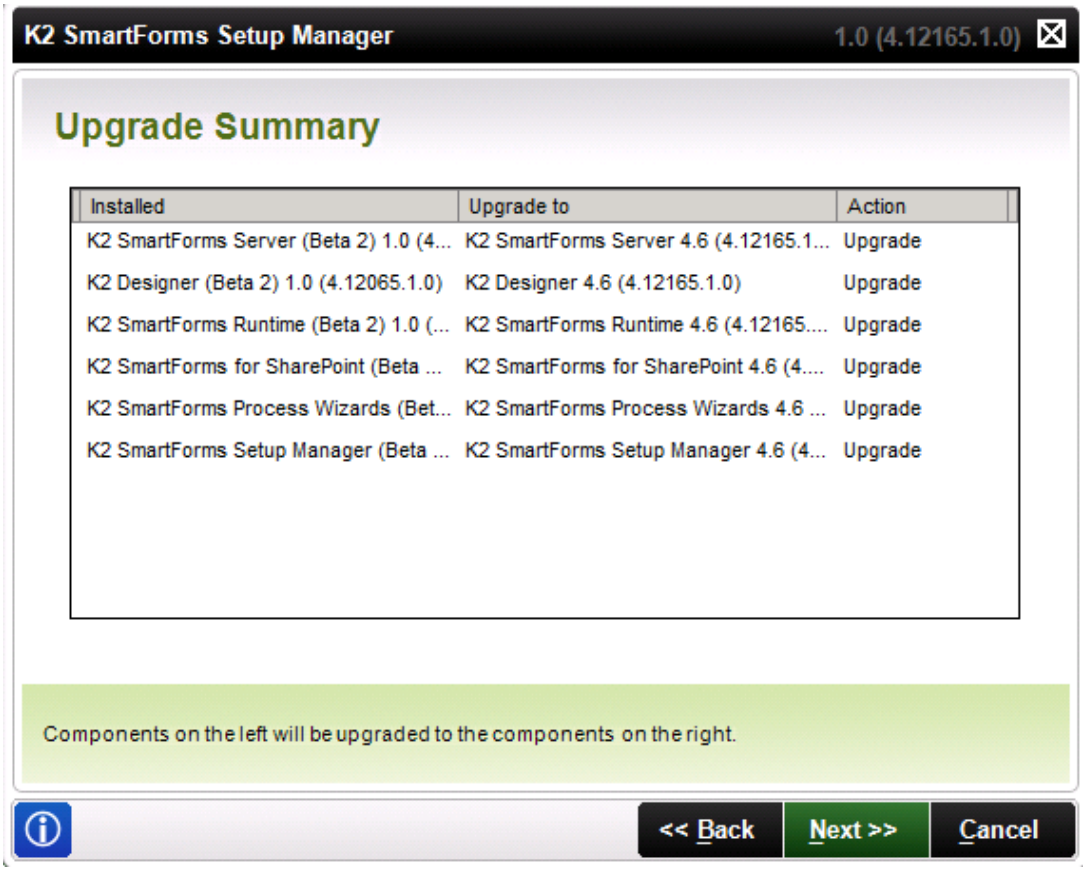
4. The Upgrade Summary screen shows on the left what components are currently installed on the machine. The center column displays the corresponding component that it needs to upgrade to. The right hand column displays the action that is required, in this instance it will be Upgrade. Once you have reviewed the summary click **Next** to continue.



5. Enter a valid license key for K2 smartforms and click Next. A license key can be obtained from https://portal.k2.com/licensekey/Default.aspx. This URL is also available on the License Configuration page under Key Request.

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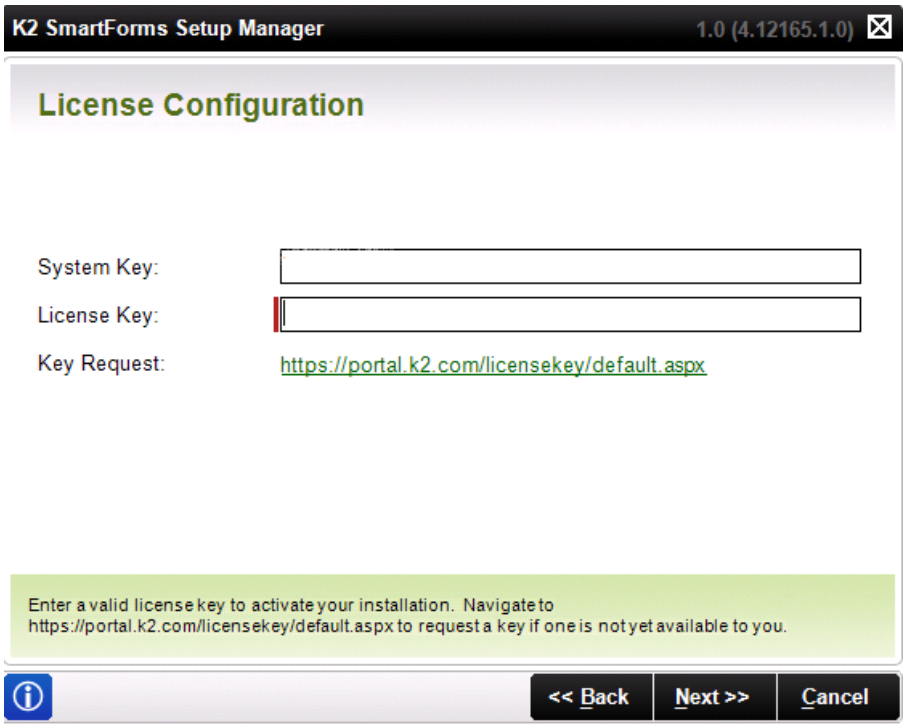
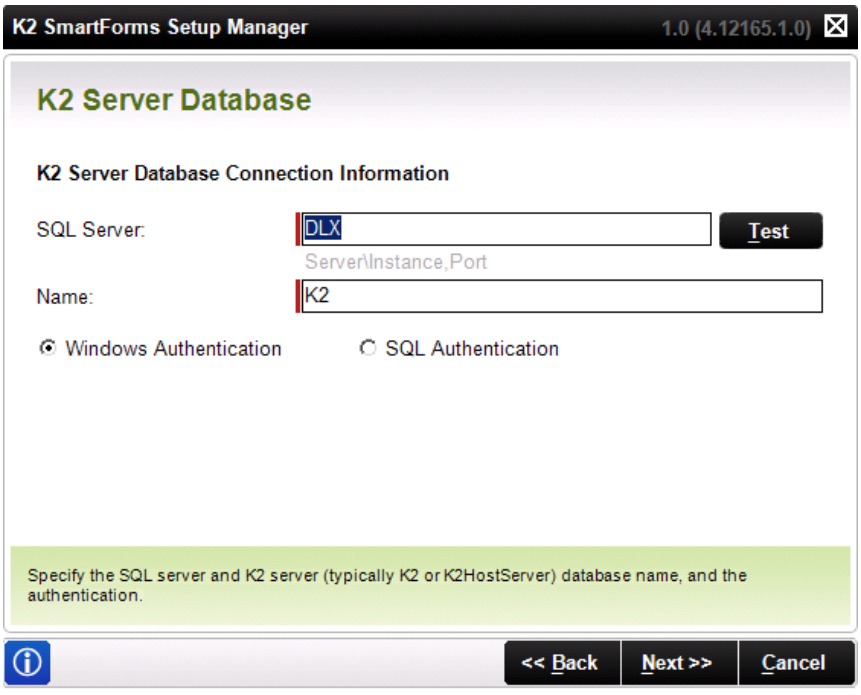


6. On the K2 Server Database screen, select the SQL Server and database name where the K2 blackpearl Host Server database is installed, as well as the authentication type. You can test this connection by clicking on the **Test** button.



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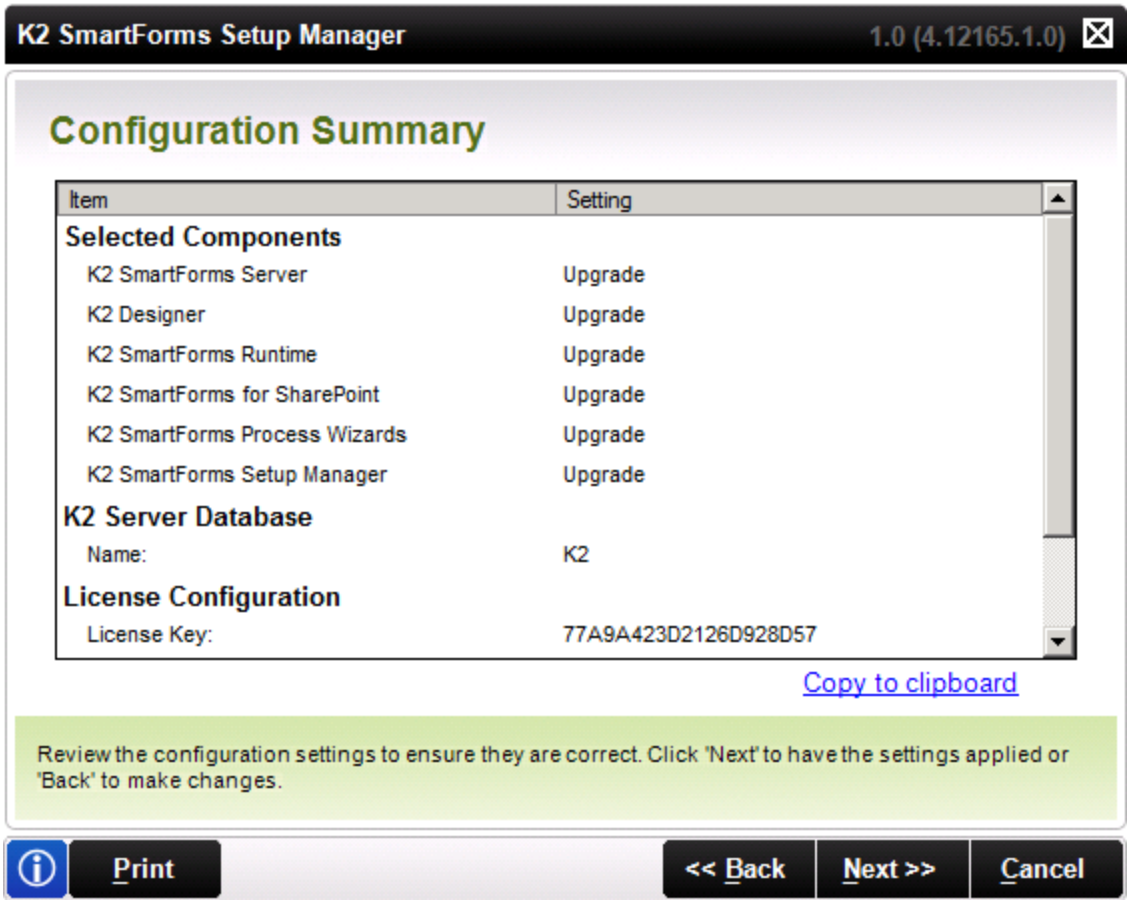
7. The next screen displays the configuration information for your K2 environment. Based on the components that need to be upgraded, the screens may or may not appear. The Configuration Summary screen will list all of the information you entered in the K2 smartforms Setup Manager. Be sure to scroll through the information and make sure that everything is accurate. You can also print this information for your records, or copy the information to the clipboard to insert into a document. Once you've reviewed the information, click **Next** to continue.



8. If there are any necessary steps to complete before the upgrade can proceed, you will see the Additional Actions screen. This will list the actions that can be performed automatically by the setup manager, such as an IISReset. If there are any actions that need to be performed manually, they will also be listed here. Be sure to complete the action, then come back to the setup manager and refresh the list. Click **Next** for the actions to be performed and for the installation to proceed.

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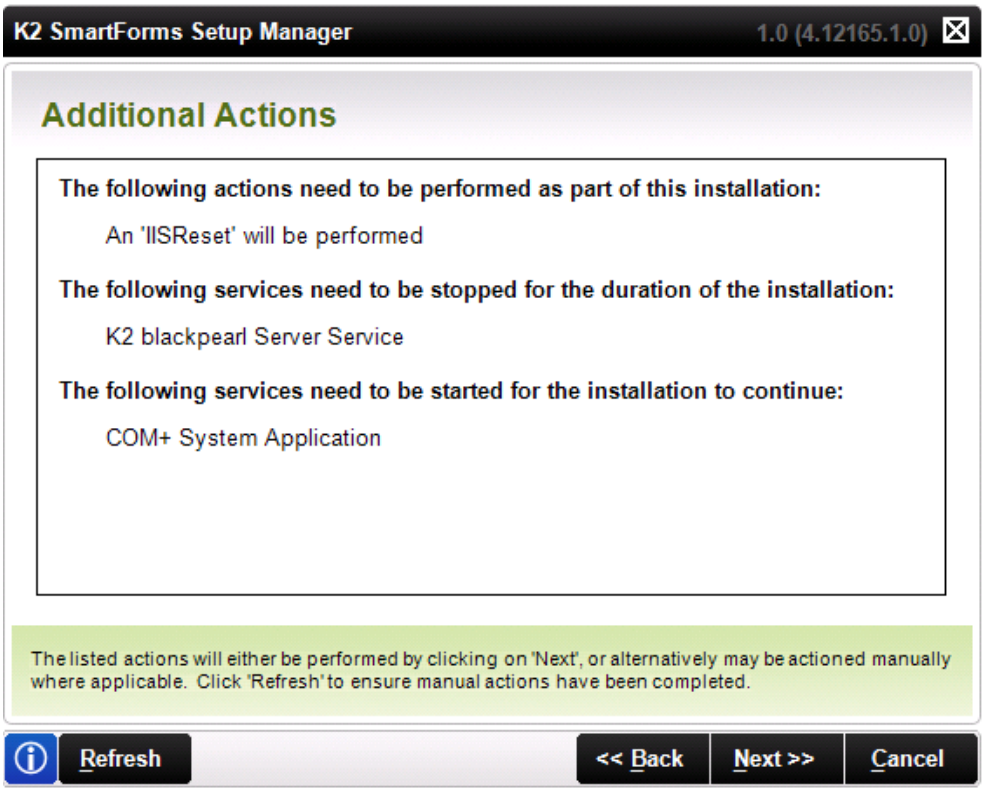
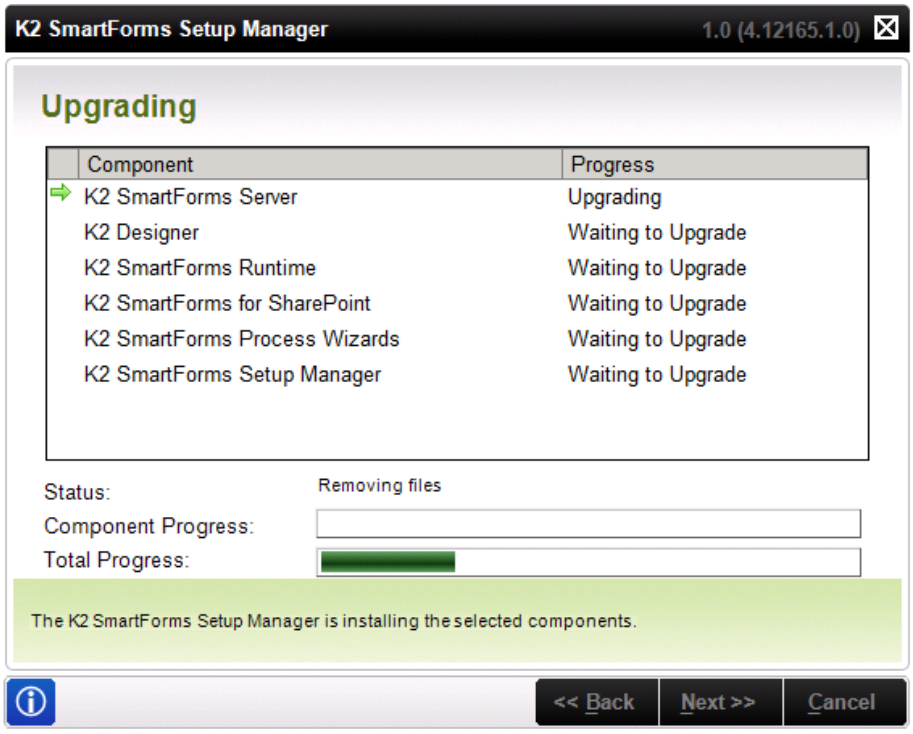


9. After clicking Next, the component upgrade will begin. The progress bar will show you the status of each component, as well as the total progress. The upgrade may take a few minutes, depending on your environment.



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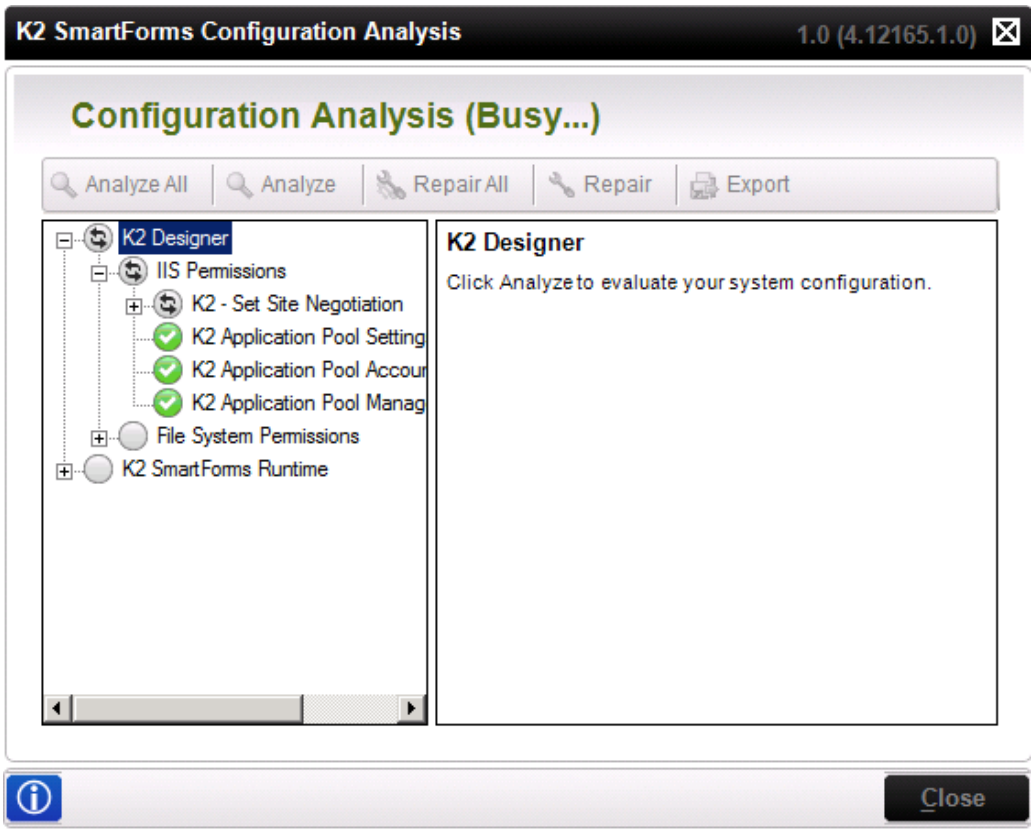
10. The Configuration Analysis screen is displayed once the Configuration Status screen has completed. The K2 Configuration Analysis Tool is an automated system analysis tool that will be available post installation if errors are detected. This enables the individual performing the upgrade to troubleshoot the error at the time of installation.
    Note: On the upgrade the Configuration Analysis will only be required for the K2 Designer component and K2 smartforms Runtime component.



11. Once the K2 smartforms setup has completed, you will see the Finished screen. There will be a link to the log file that was created, as well as information if any errors were encountered during configuration. Clicking Finish completes the installation process.

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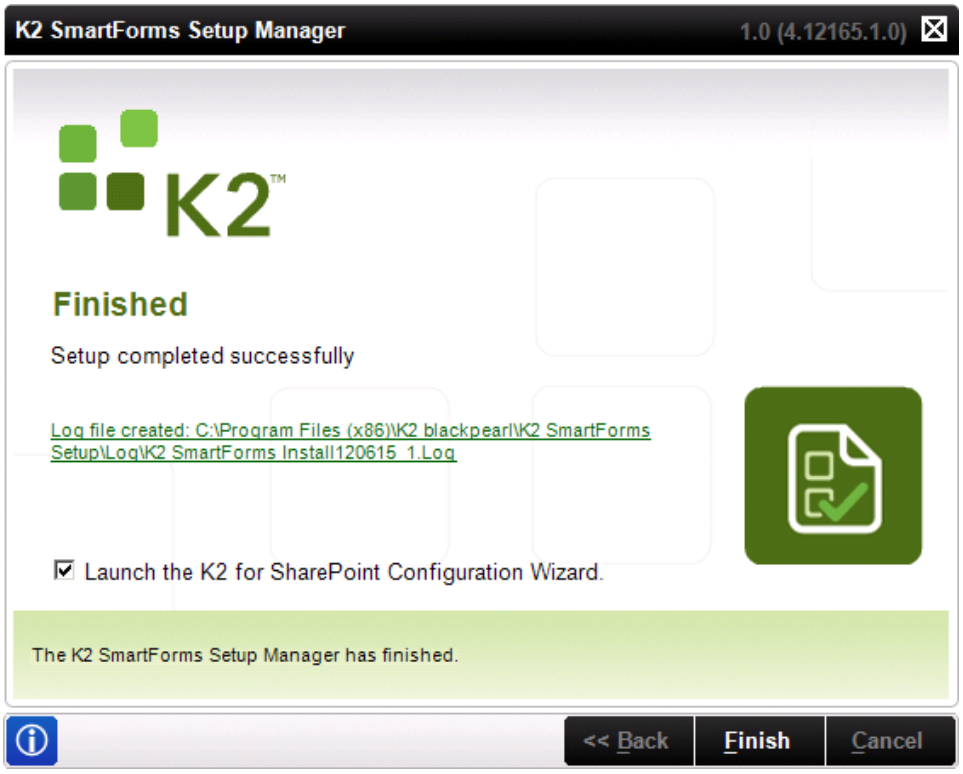
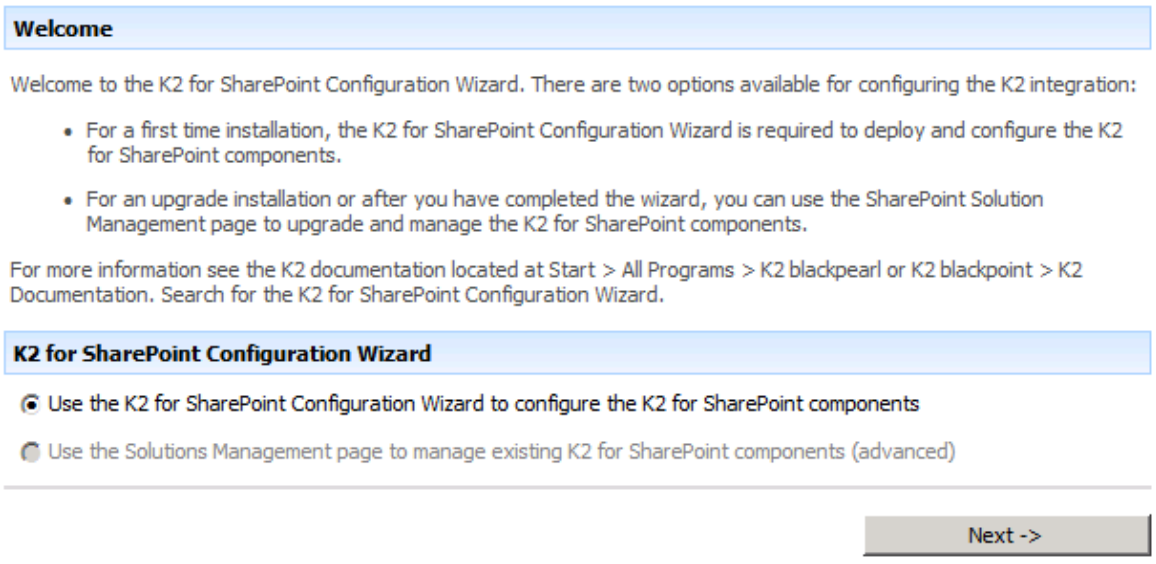


12. The K2 Setup Manager will automatically open the K2 for SharePoint Configuration wizard. This wizard assists in the upgrade of the K2 SharePoint solutions as well as the activation of K2 Features. The wizard will give you the option to configure SharePoint by stepping through the wizard or to manually install, deploy and activate solutions and features.

Note: The SharePoint Configuration wizard can be accessed after the installation through the Start> K2 blackpearl> K2 SmartForms menu



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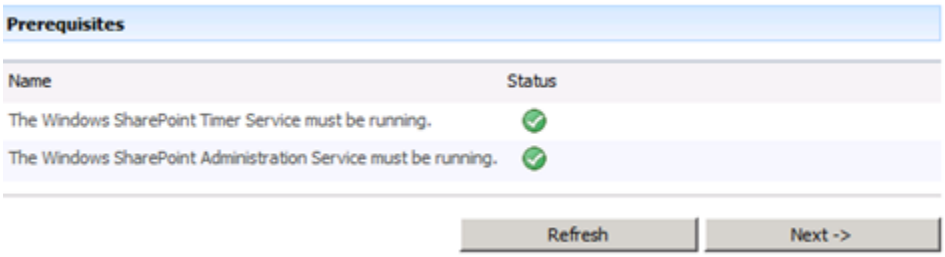
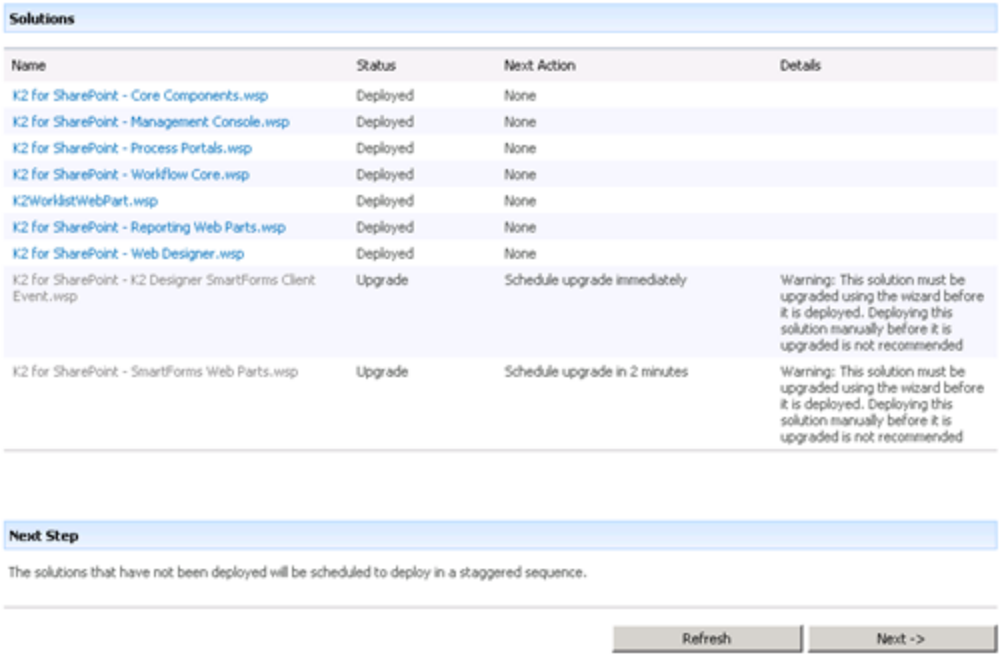
13. Selecting to use the K2 for SharePoint Configuration wizard option and selecting Next will initiate a prerequisite check. If the prerequisites are not met the status will display a red circle with a white cross. Manually rectify the issue and click the Refresh button. Once all the prerequisites are met the **Next** button will be available to continue the configuration.



14. The next step in the configuration wizard upgrades the SharePoint Solutions on the current server. Click **Next** to start the upgrade process.



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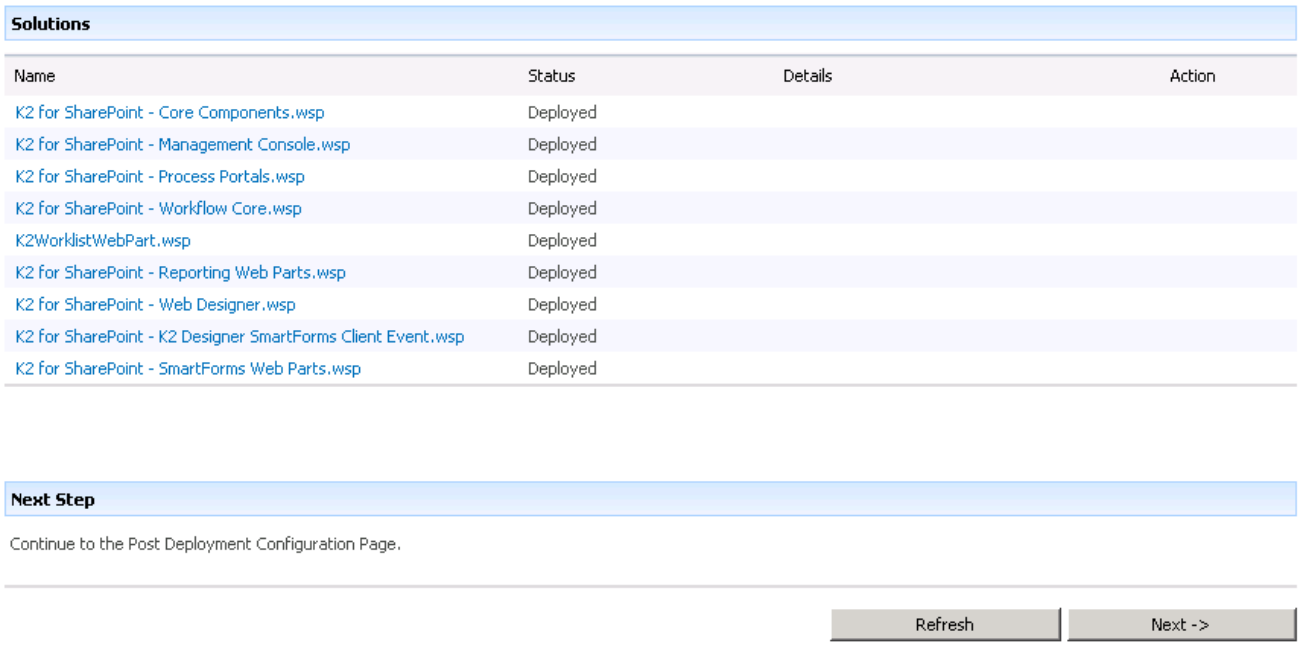
15. The page will refresh showing all the solutions as deployed and will display the Next button at the bottom of the page. Click **Next** to complete the Post Deployment Configuration.



Solutions

Name	Status	Details	Action
K2 for SharePoint - Core Components.wsp	Deployed		
K2 for SharePoint - Management Console.wsp	Deployed		
K2 for SharePoint - Process Portals.wsp	Deployed		
K2 for SharePoint - Workflow Core.wsp	Deployed		
K2WorklistWebPart.wsp	Deployed		
K2 for SharePoint - Reporting Web Parts.wsp	Deployed		
K2 for SharePoint - Web Designer.wsp	Deployed		
K2 for SharePoint - K2 Designer SmartForms Client Event.wsp	Deployed		
K2 for SharePoint - SmartForms Web Parts.wsp	Deployed		

Next Step

Continue to the Post Deployment Configuration Page.

Refresh Next ->

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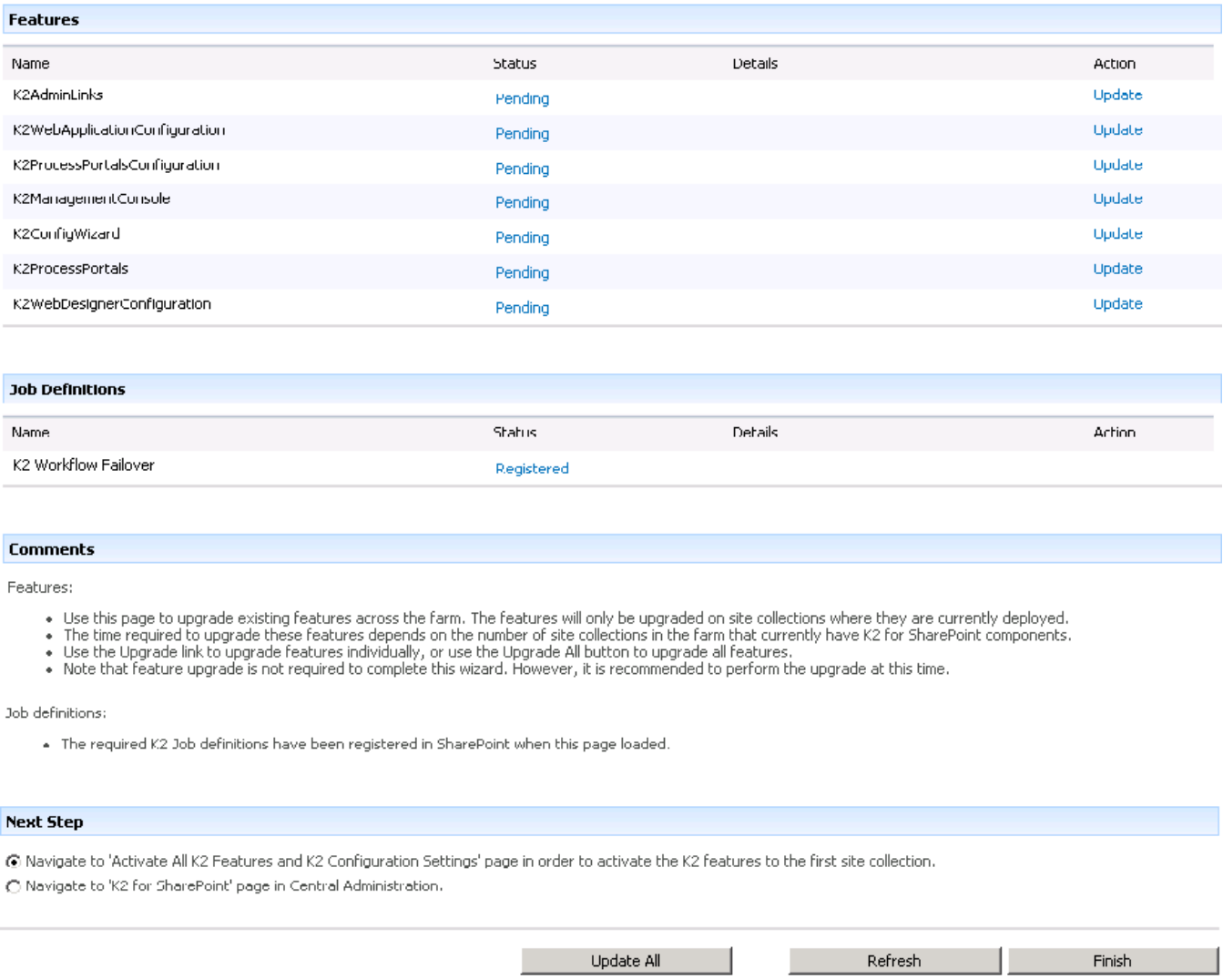
16. Click the Update All button to upgrade the existing K2 features for the Site Collection. Selecting the first option will open the Activate All K2 Features and K2 Configuration Settings page.



17. Selecting the first option will open the Activate All K2 Features and K2 Configuration Settings page. On this page select the Site Collection from the drop down list and click OK.

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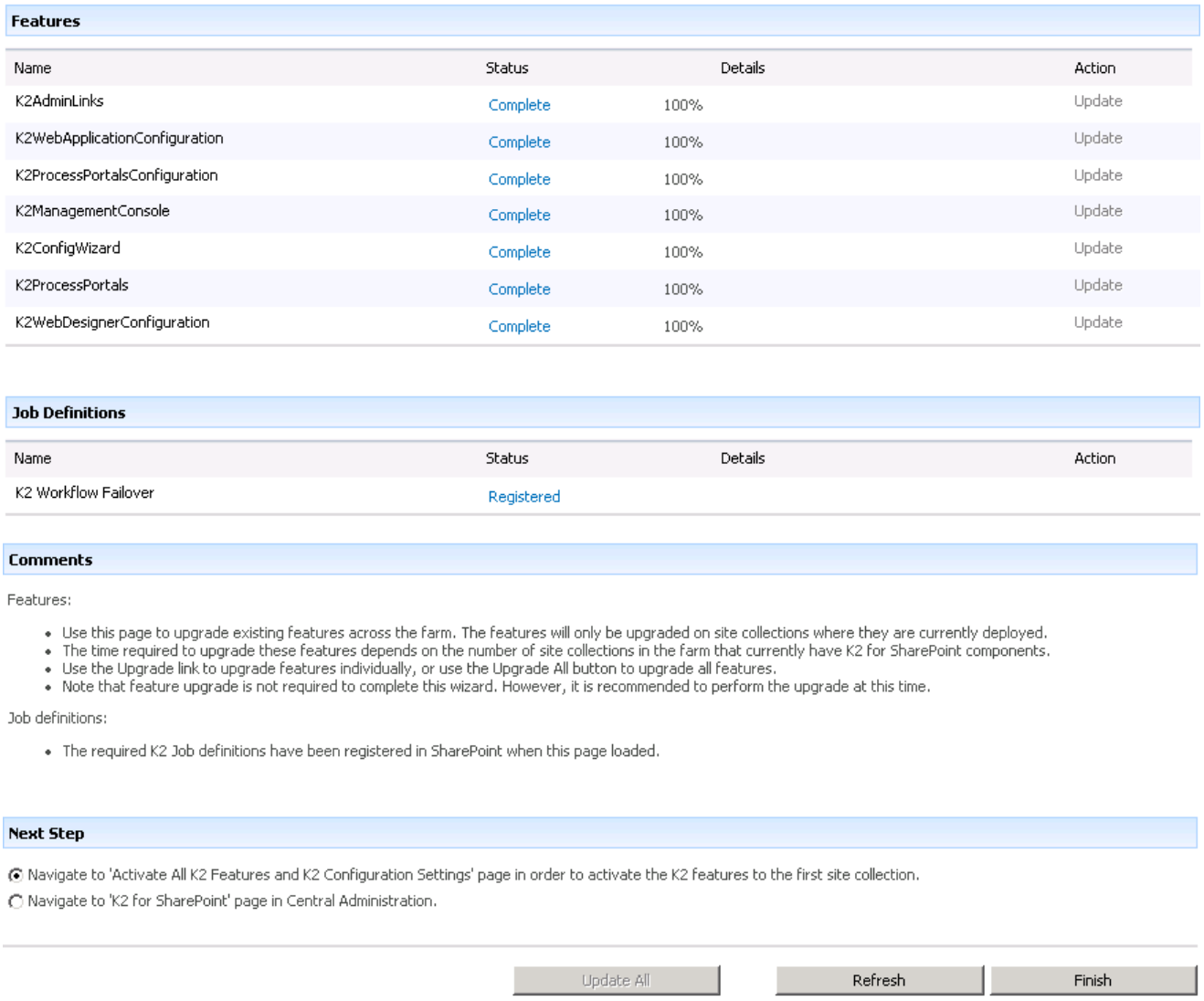

Features

Name	Status	Details	Action
K2AdminLinks	Complete	100%	Update
K2WebApplicationConfiguration	Complete	100%	Update
K2ProcessPortalsConfiguration	Complete	100%	Update
K2ManagementConsole	Complete	100%	Update
K2ConfigWizard	Complete	100%	Update
K2ProcessPortals	Complete	100%	Update
K2WebDesignerConfiguration	Complete	100%	Update

Job Definitions

Name	Status	Details	Action
K2 Workflow Failover	Registered		

Comments

Features:

- Use this page to upgrade existing features across the farm. The features will only be upgraded on site collections where they are currently deployed.
- The time required to upgrade these features depends on the number of site collections in the farm that currently have K2 for SharePoint components.
- Use the Upgrade link to upgrade features individually, or use the Upgrade All button to upgrade all features.
- Note that feature upgrade is not required to complete this wizard. However, it is recommended to perform the upgrade at this time.

Job definitions:

- The required K2 Job definitions have been registered in SharePoint when this page loaded.

Next Step

(•) Navigate to 'Activate All K2 Features and K2 Configuration Settings' page in order to activate the K2 features to the first site collection.

( ) Navigate to 'K2 for SharePoint' page in Central Administration.

Update All | Refresh | Finish

Note: The Features are activated per Site Collection, so for multiple Site Collections this step will need to be repeated, selecting the relevant Site Collection from the drop down list.

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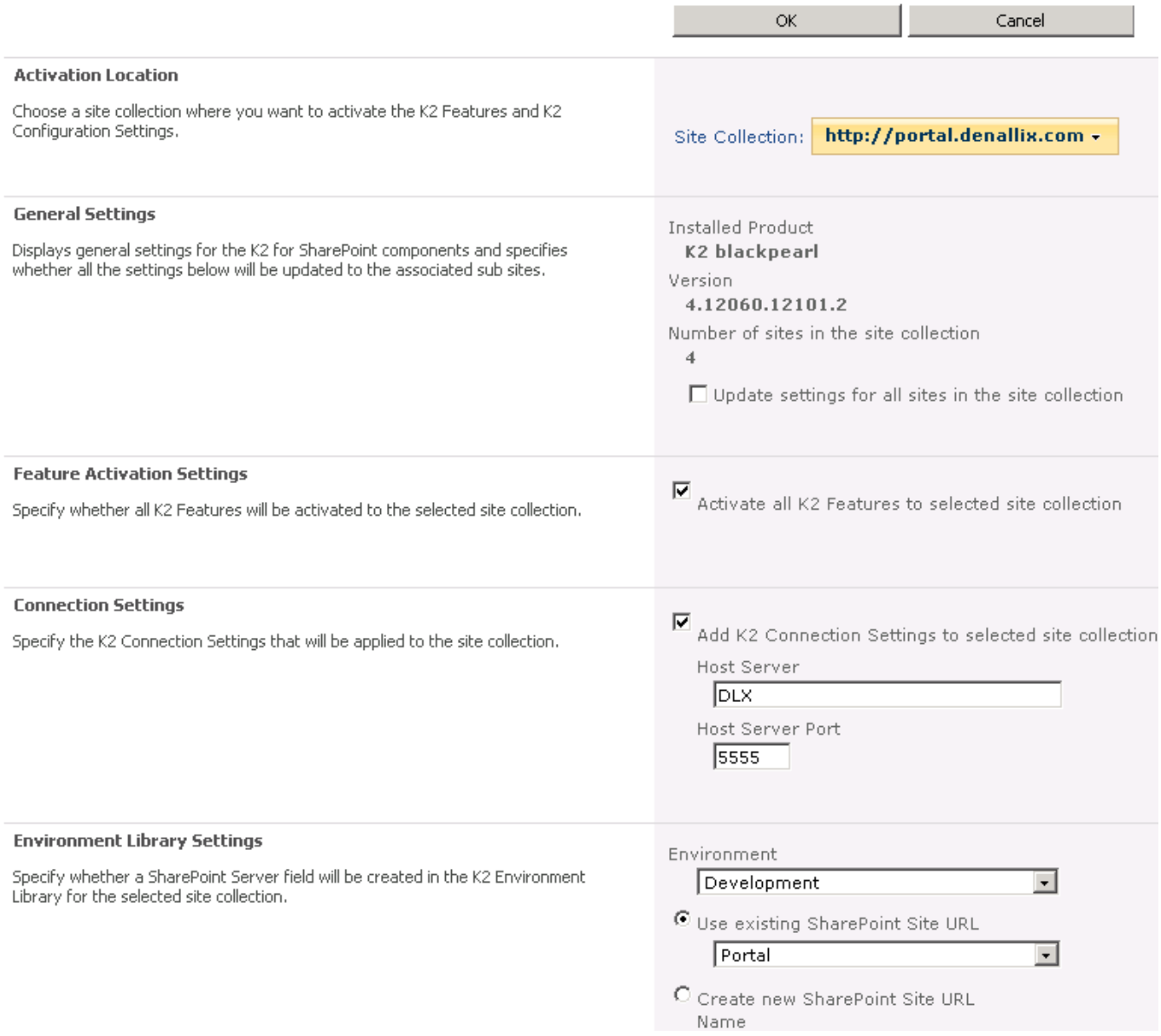

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POST INSTALLATION STEPS

The following items need to be done after installation of K2 SmartForms Beta 2.

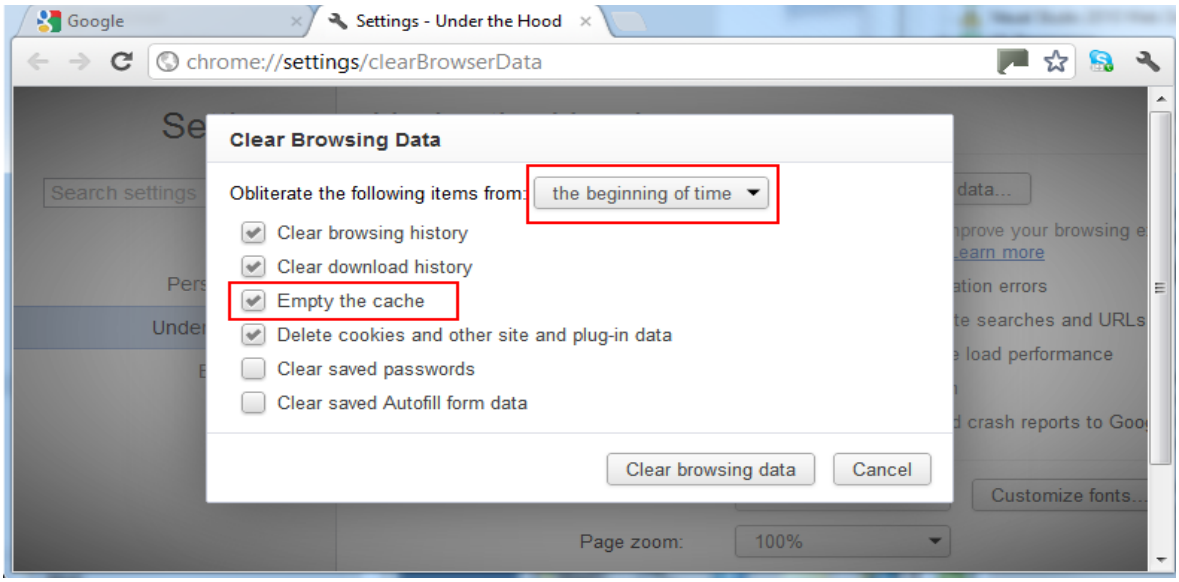
CLEAR YOUR BROWSER CACHE

Clearing Internet Explorer 8 and 9 cache

1. Press **F12** on the keyboard.
2. The Developer Tool window will open. Click the **Clear Browser Cache** button.
3. Select **Yes** to the "Are you sure you want to clear the browser cache?" question.
4. Close the Developer Tools window and close Internet Explorer.
5. Reopen the browser and access the K2 Designer site.

Clearing Google Chrome cache

1. Press the **Ctrl + Shift + Delete** keys on your keyboard at the same time.
2. The Clear Browsing Data window will open. Select the drop down arrow next to "Obliterate the following items from:" and select **the beginning of time**.
3. Select the **Empty the cache** checkbox.



4. Click the **Clear browsing data** button in the bottom right hand corner.
5. Close the Chrome browser.
6. Reopen the browser and access the K2 Designer site.

Clearing Safari cache

1. Select the **Edit** menu option.
2. Select the **Empty Cache** option.

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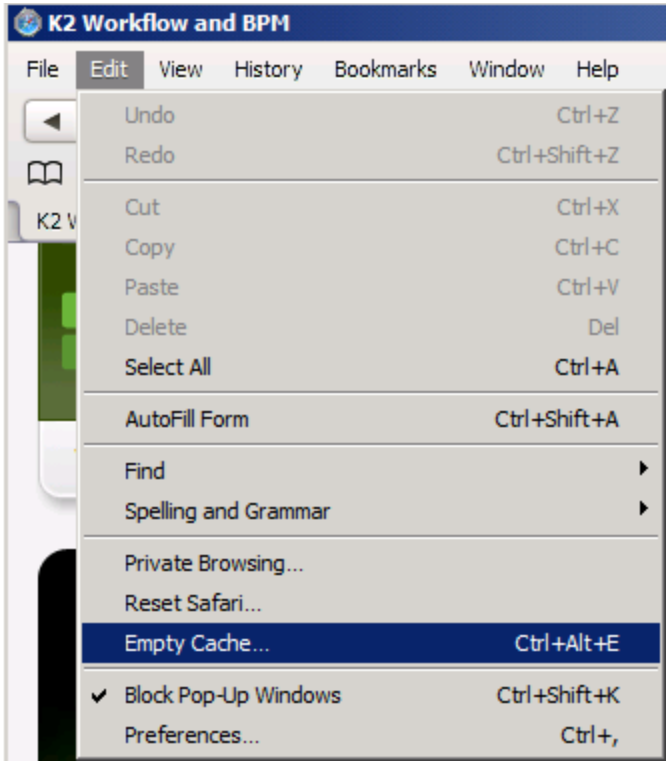
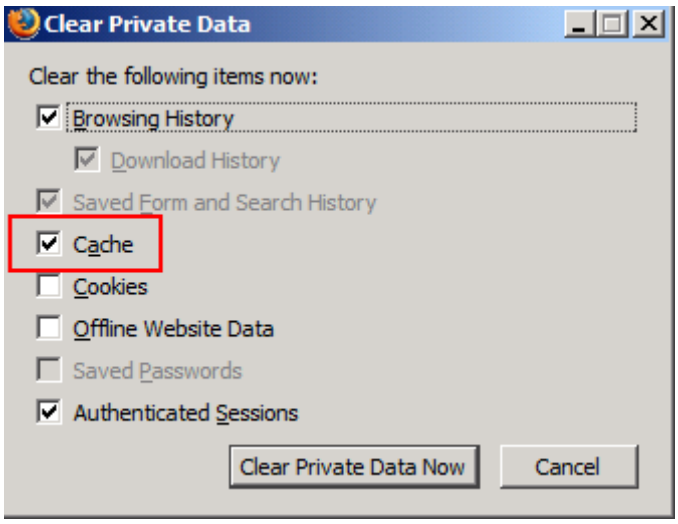


3. Click the **Empty** button in the warning window.
4. Close the browser.
5. Reopen the browser and access the K2 Designer site.

Clearing Firefox cache

1. Press the **Ctrl + Shift + Delete** keys on your keyboard at the same time.
2. Select the Cache checkbox and click **Clear Private Data Now**.



3. Close the browser.
4. Reopen the browser and access the K2 Designer site.

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The Upgrade is complete and K2 smartforms 1.0 (4.12165.1.0) is successfully installed.

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