

# **Roundtable / Dynamics Upgrading to Dynamics 10.0B03**

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# 1 Introduction

This document describes the process of upgrading a Roundtable installation with Roundtable and Dynamics to Progress Dynamics 10.0B03. The processes described in this document refer to an upgrade from an environment with OpenEdge 10.0B02 to Dynamics 10.0B03.

Performing a new installation is not described in this document.

## 2 Installation preparation

### 2.1 Pre-requisites

The following product installations are a pre-requisite for the installation and use of the Roundtable Dynamics integration with Dynamics 10.0B03:

#### 2.1.1 Roundtable 10.0A02 or higher

The Roundtable Dynamics integration supported by Tugboat Software requires that Roundtable 10.0A and patch 10.0A03 have been installed.

Roundtable 9.1C has not been tested with this release of Dynamics, and it is not supported by Roundtable.

The steps for upgrading a Roundtable installation and Roundtable repository to 10.0B02 are not included in the upgrade document. Please refer to the following document available from the Roundtable website.

#### 2.1.2 Progress OpenEdge 10.0B

The Roundtable partner site deployment package described in this document requires that Progress OpenEdge 10.0B is installed and used during and after the upgrade.

#### 2.1.3 Dynamics 10.0B03

The Roundtable Partner Site deployment package described in this document contains a copy of the commercial Progress OpenEdge 10.0B03 code. This code is limited to the code needed to make a workspace complete enough for application development with Dynamics as a part of the application.

There are some other files included in the commercial CD installation of OpenEdge 10.0B03 from Progress Software. It is therefore important that this has been installed separately prior to performing this upgrade.

## 3 Installing and loading the incremental partner site deployment

### 3.1 Partner site deployment packages

The Roundtable Partner Site Deployment packages provided for OpenEdge 10.0B03 consist of 2 packages:

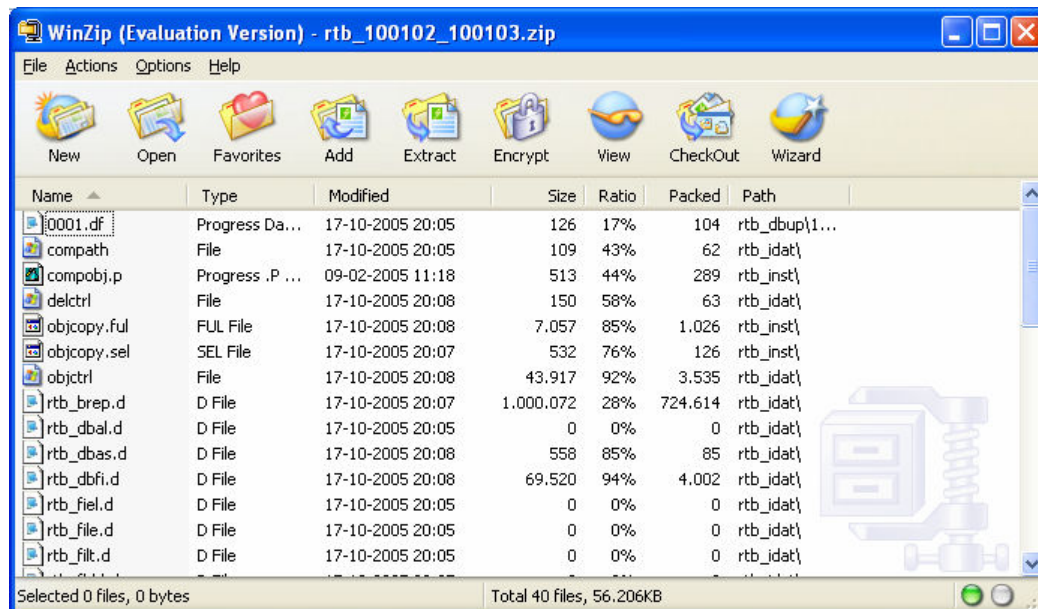
1. An incremental deployment package for upgrading from Dynamics 10.0B02 to Dynamics 10.0B03. This deployment is provided as a .zip file with the name: **rtb\_010102\_010103.zip**
2. A full partner site deployment package for creating a new full OpenEdge Roundtable environment. This deployment is provided as a .zip file with the name: **rtb\_010103.zip**

NOTE: Both of the .zip files with the partner site deployment only contain the contents of the rtb\_\* directories from the deployments. They do not contain the files that were generated from the deployment. This has been done intentionally to reduce the download size of the .zip files. The contents of the workspaces contained in these .zip files can be extracted from the updated RTB repository using the Populate Workspace functionality in Roundtable.

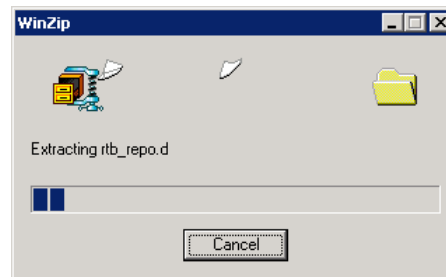
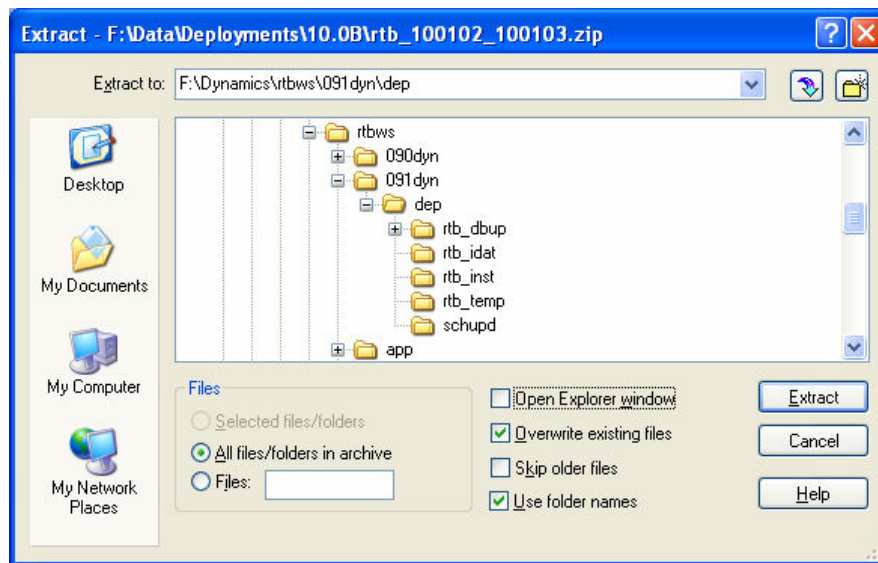
### 3.2 Updating the 091dyn-dep receipt workspace

#### 3.2.1 Loading the partner site deployment

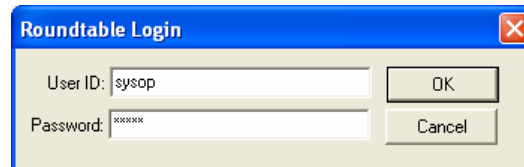
3. Locate the correct .zip file with the incremental partner site deployment and open it in WinZip or an equivalent tool.



4. Unzip the contents of the .zip file to the root of the 091dyn-dep workspace (e.g. C:\Dynamics\rtbws\091dyn\dep).



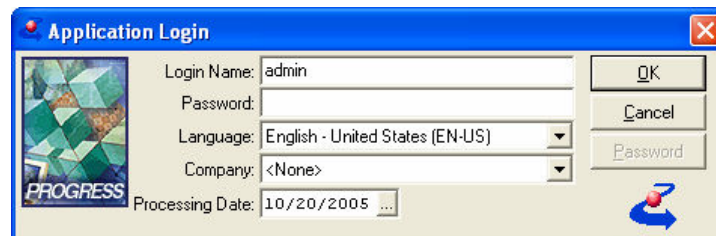
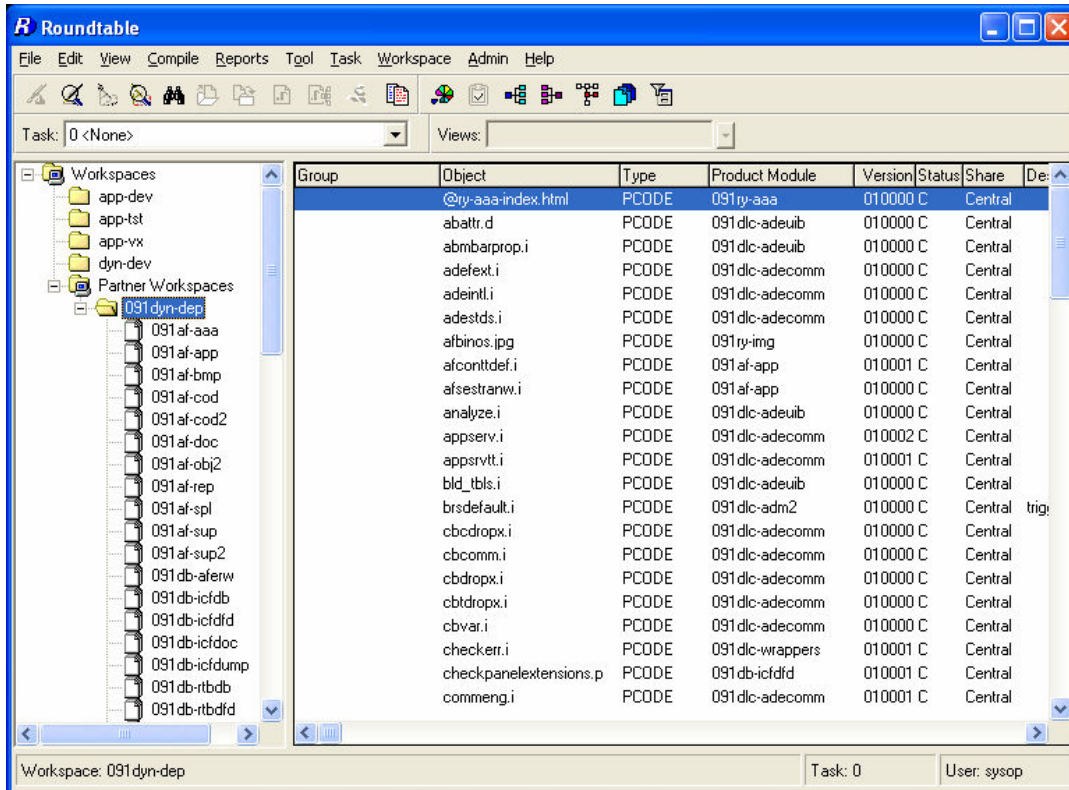
5. Once the package has been unpacked, start Roundtable and log in as the **sysop** user.



6. **Select the 091dyn-dep workspace** and log in to the Dynamics environment.

This workspace should be a fully functional workspace where the default version of Dynamics can be run and used as a reference.

The reason for selecting this workspace before the Partner Site Replication is to **ensure that the date format and numeric formats are correctly set** for the session when loading the partner site data.

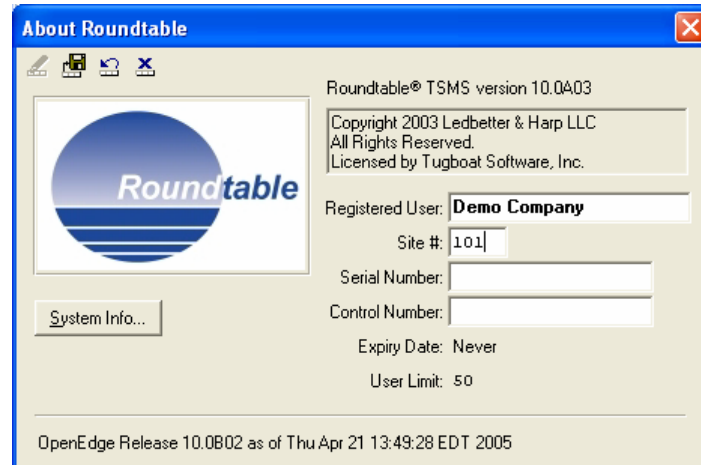


## 7. Change the RTB site number

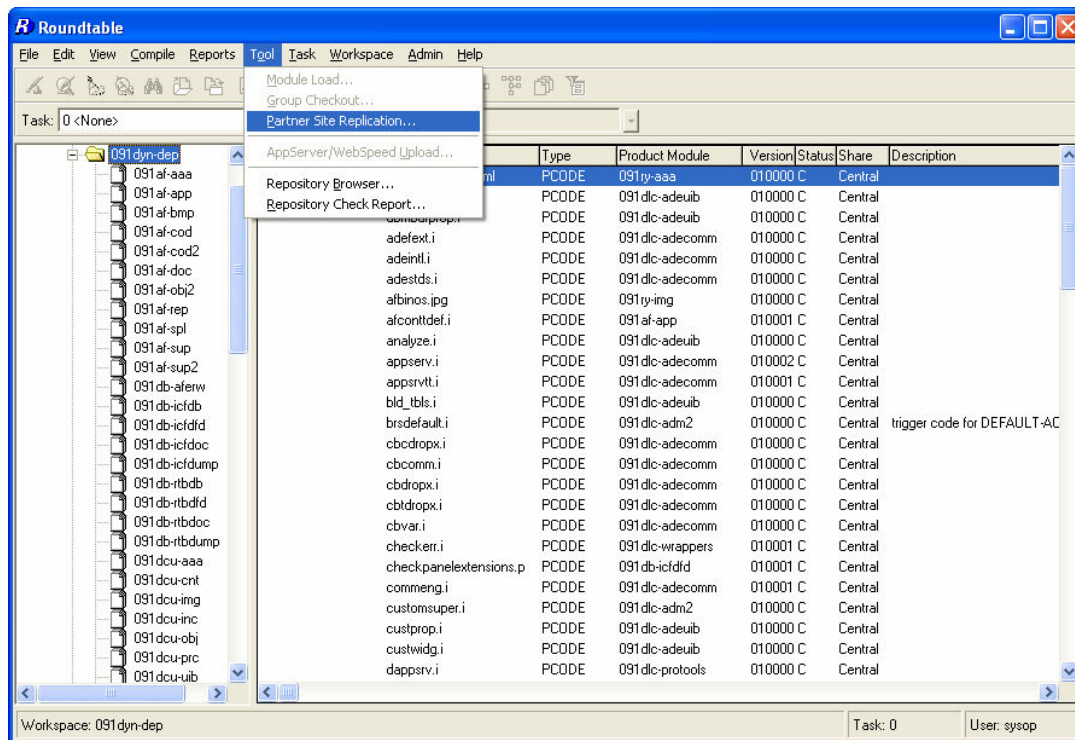
If the RTB site number is 000, then this should be temporarily changed prior the Partner Site Replication.

This is necessary as there are new Code Subtype definitions added to the repository for this release. These will not be loaded into the RTB repository if the site number is 000.

Set the site number to 101.

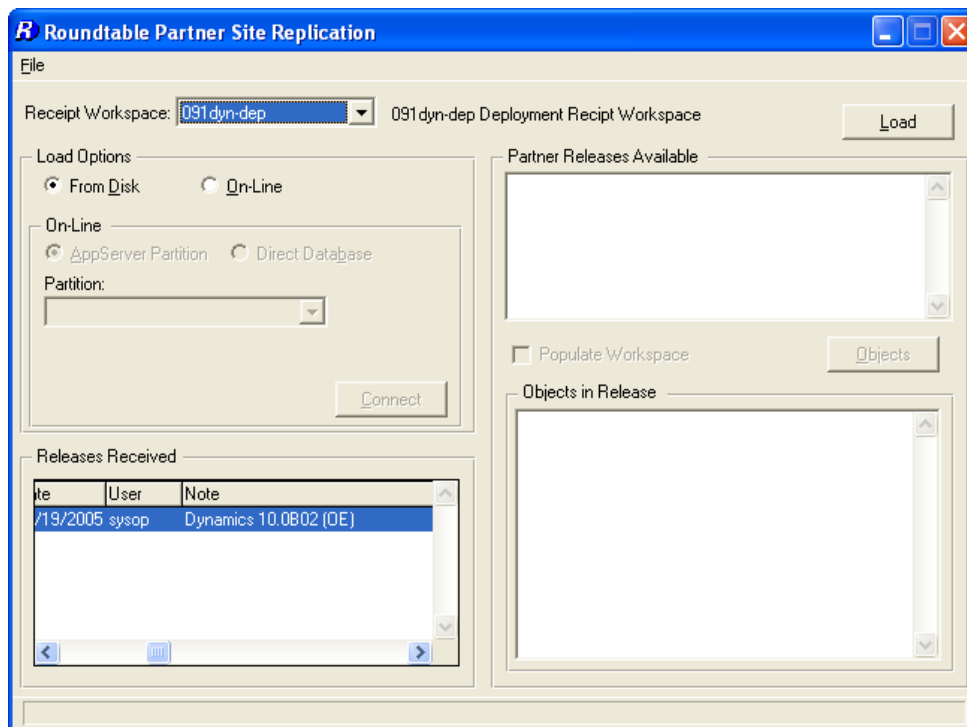


## 8. Select Tool → Partner Site Replication.

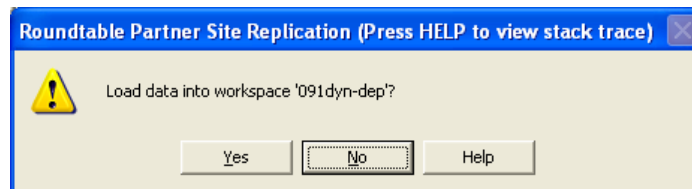




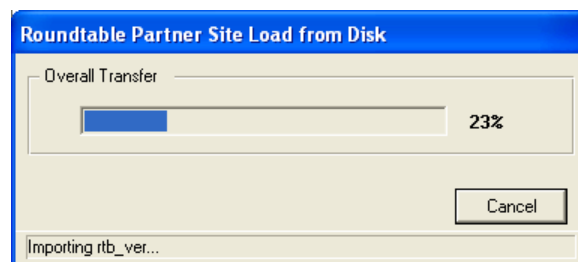
9. Select the 091dyn-dep workspace and the Load option “From Disk”. Press the Load button.



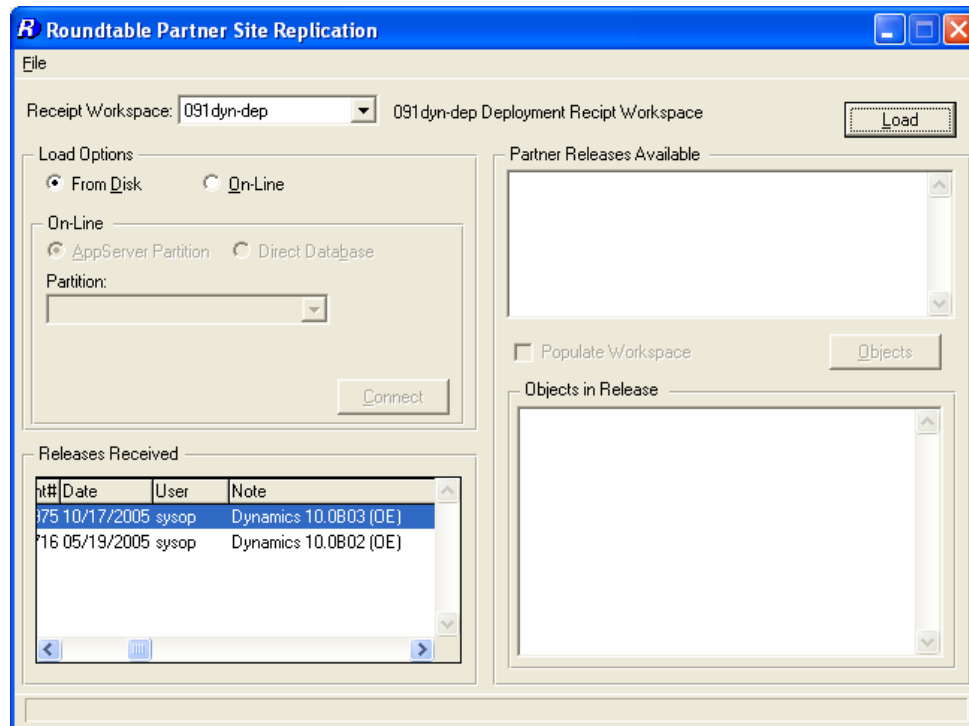
10. Answer yes to the following question



11. The Partner Site Replication is now started.



12. The Partner Site Replication has completed.

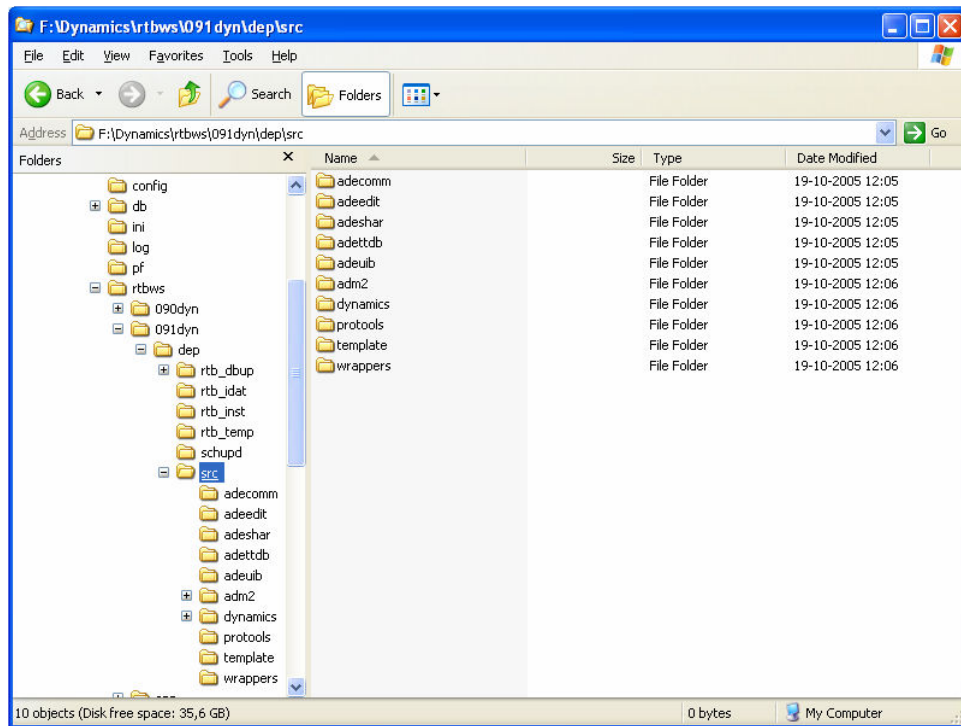


### 3.2.2 Populate Workspace

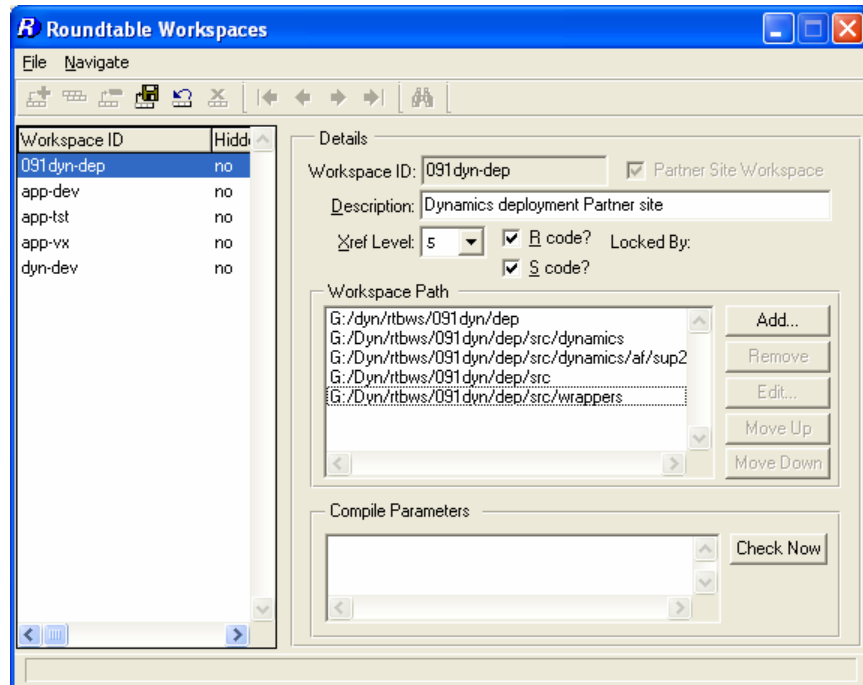
Once the Partner Replication has completed, the files on disk for the workspace need to be refreshed.

13. **Delete the source contents of the 091dyn-dep workspace.** To make sure that deleted objects that are no longer part of the 091dyn-dep workspace, the following sub-directories for the workspace should be deleted:

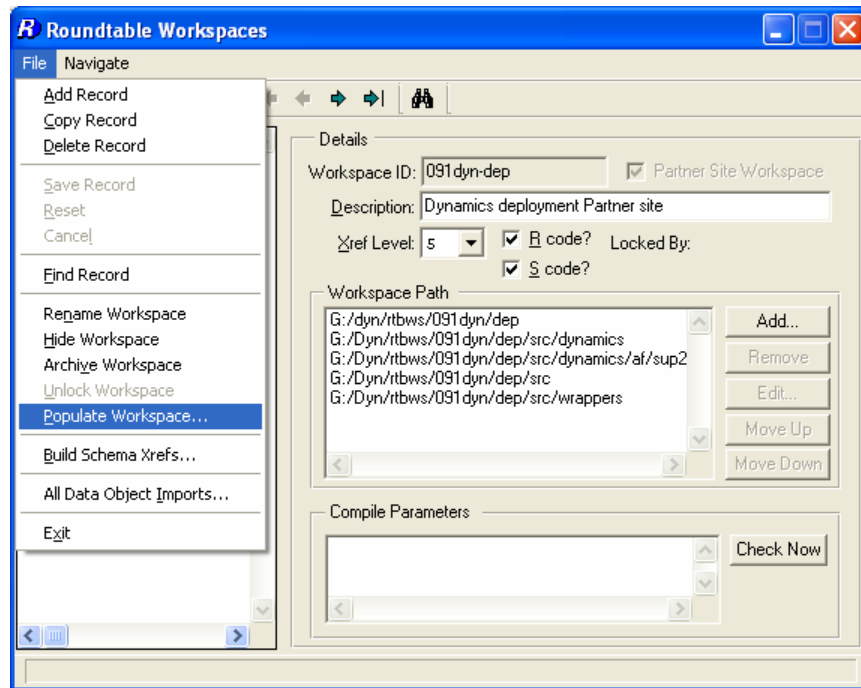
A. <091dyn-dep workspace root>\src



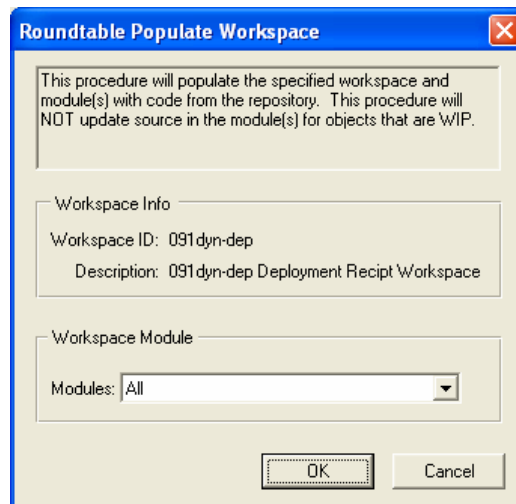
14. Start the Workspace Maintenance.



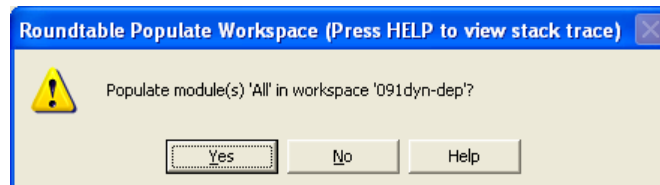
15. Select the 091dyn-dep workspace, and select Populate Workspace from the File menu.



16. Select "All" modules and press OK.

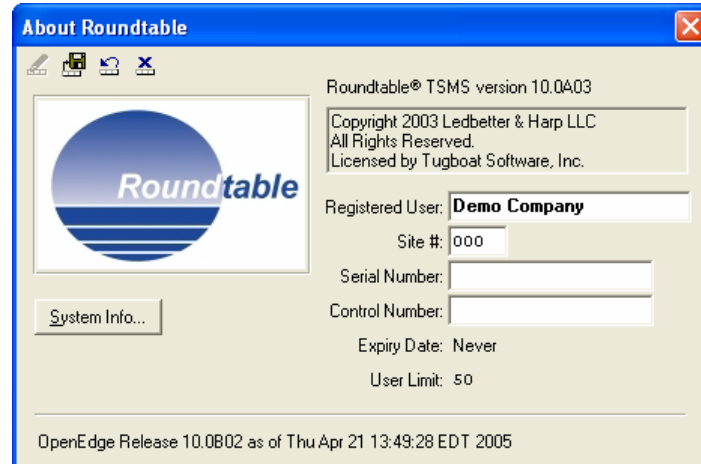


17. Select **Yes**.



18. When the Populate Workspace is completed, select **OK**.

19. Once the Populate Workspace is completed, remember to reset the Roundtable Site number back to 000 if it was changed at the start of the upgrade process.



20. When the source code for the workspace has been repopulated, the ICFDB database must be updated and the contents of the workspace recompiled. This should be done using the Dynamics Configuration Utility (DCU).

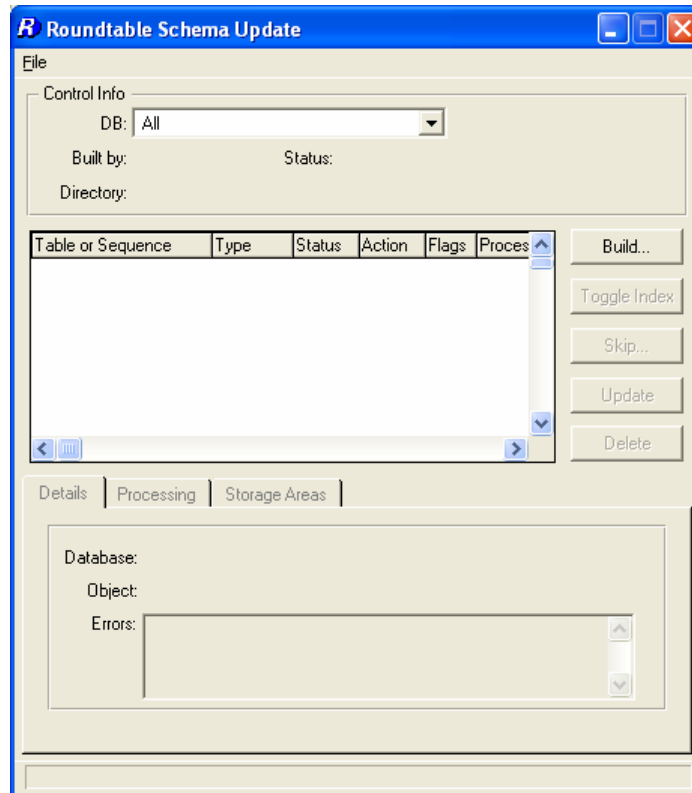
### 3.2.3 Upgrading the 091dyn-dep ICFDB database

The ICFDB database for the 091dyn-dep workspace needs to be updated with the DCU from Dynamics 10.0B03.

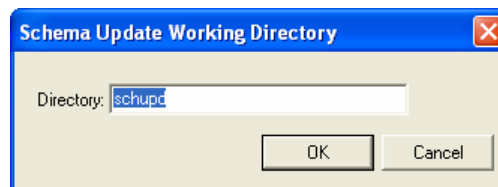
#### 3.2.3.1 Update Schema

There are schema changes included in the partner site deployment. These schema changes have to be “applied” to the receipt workspace. This is necessary even though Roundtable is not used to update the schema of the workspace database with the Roundtable Dynamics integration.

1. Select **Workspace** → **Update Schema**

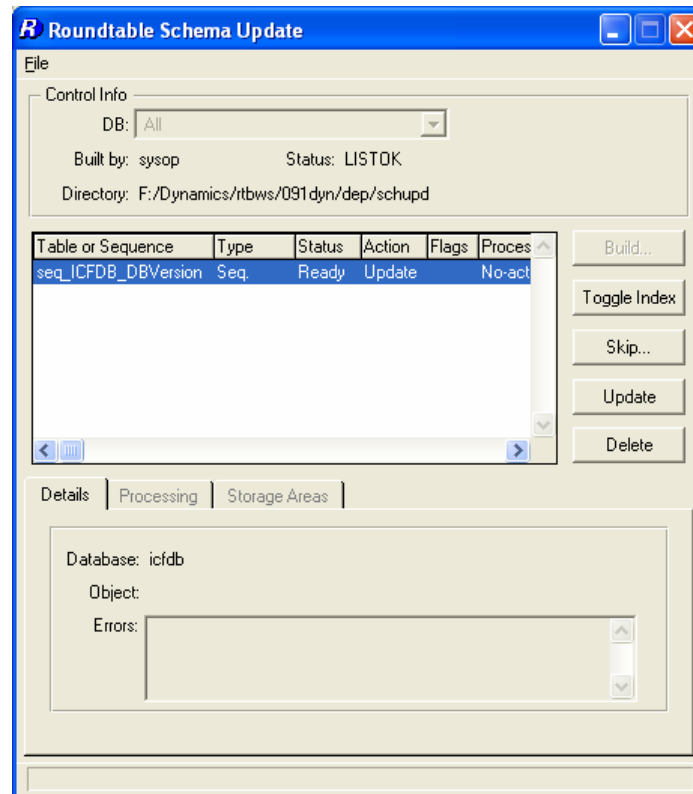


2. Press **Build**

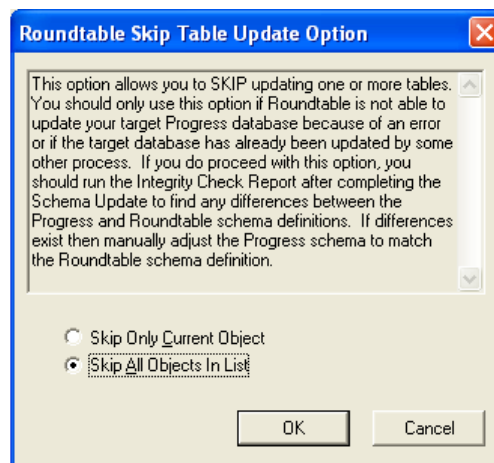


3. As the schema update function is not to be used to perform the physical schema update here, all of the updates in the schema update table need to be skipped.

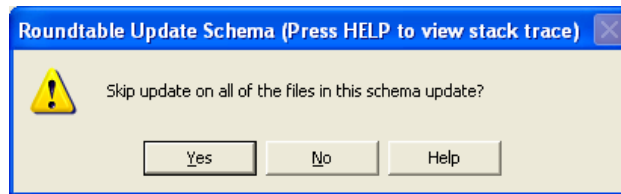
Press the **Skip** button.



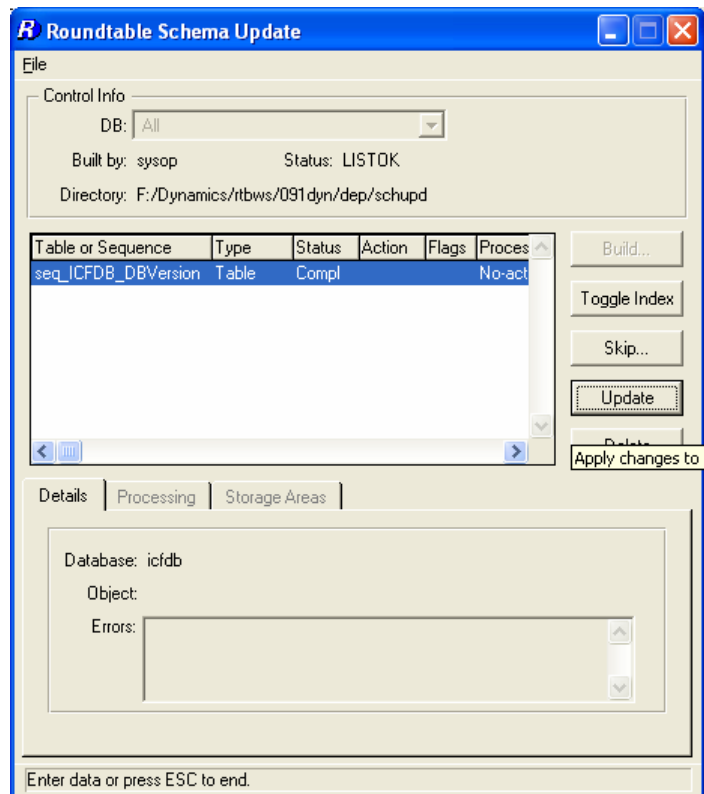
4. Make sure all of the objects in the schema update table are skipped by selecting the **Skip All Objects In List** option.



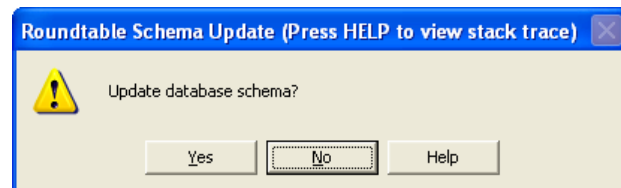
5. Press **Yes**.



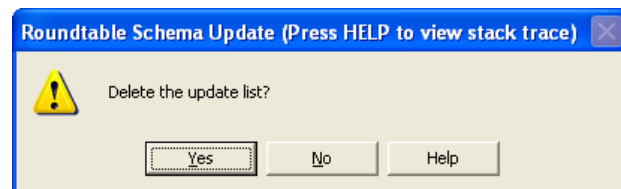
6. Remember to press the **Update** button to complete the processing of the contents of the schema update table.



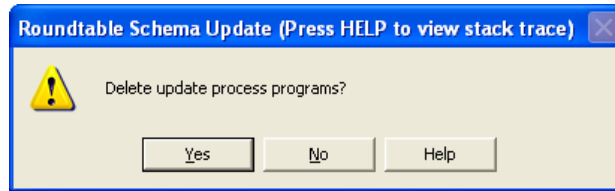
7. Answer **Yes** to the following prompt.



8. **Delete** the contents of the schema update table and answer **Yes** to the following 2 prompts.

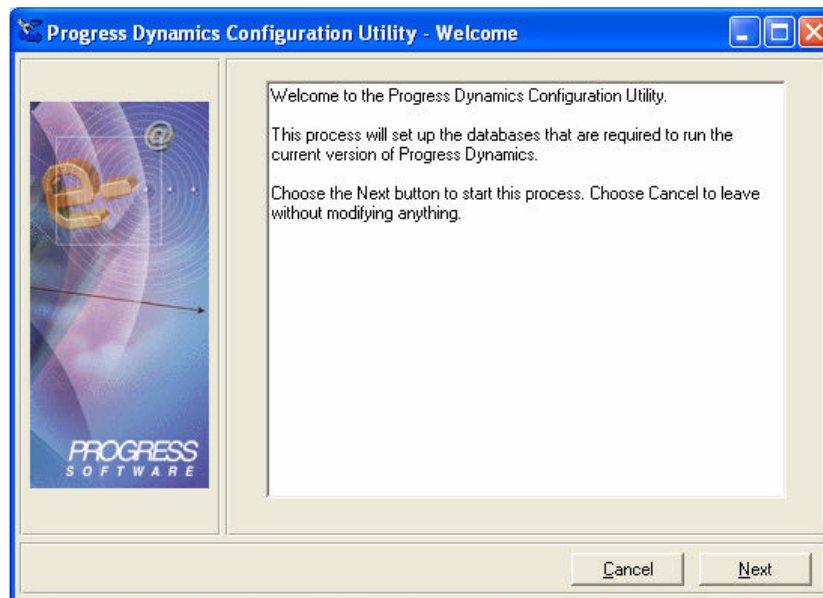
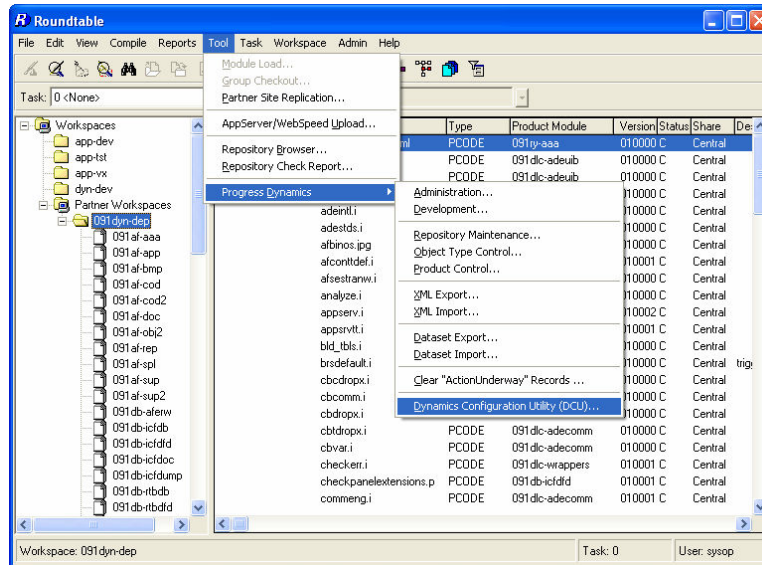




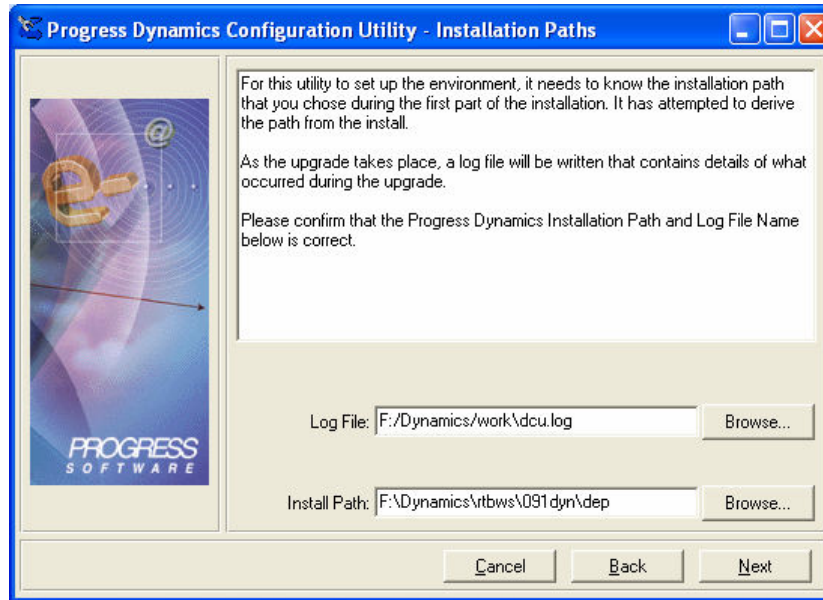


### 3.2.3.2 Running the DCU in 091dyn-dep

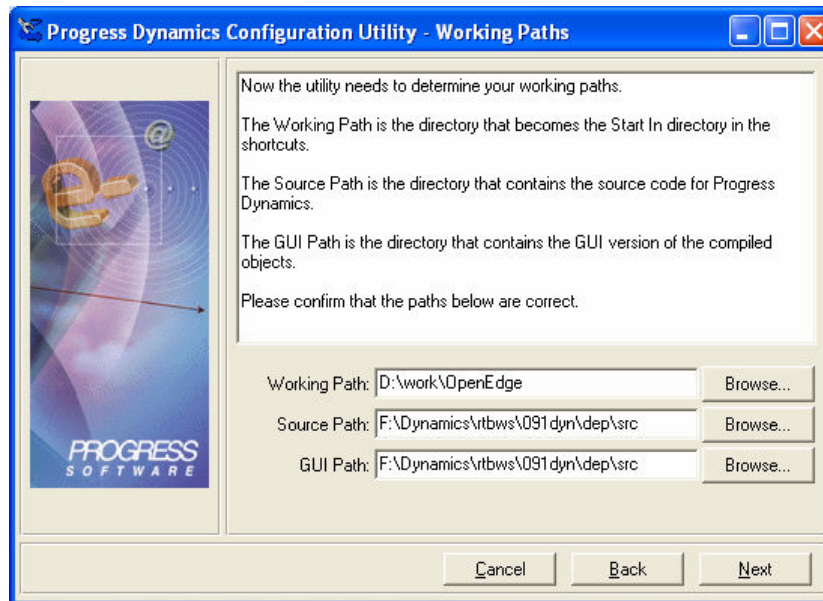
9. Start the DCU from Tool → Progress Dynamics → Dynamics Configuration Utility (DCU)



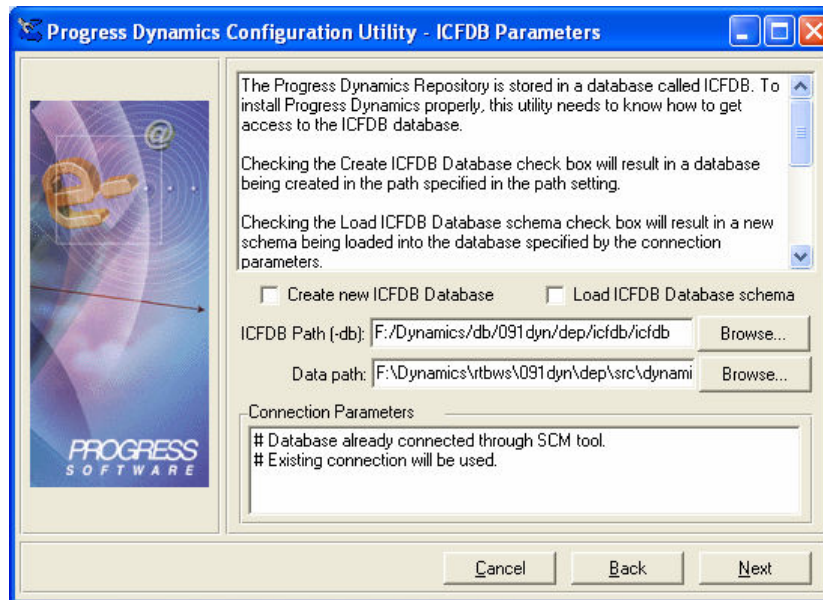
10. Change the Install Path to be the root path of the 091dyn-dep workspace.



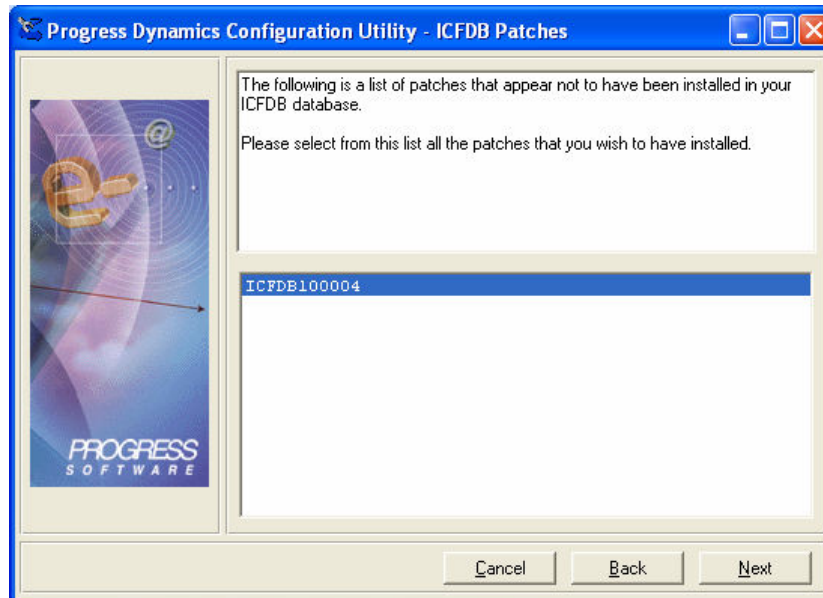
11. Change the GUI Path to be the same as the Source Path.



12. The database connection to the ICFDB database is automatically picked up from the set in the database connection screen.



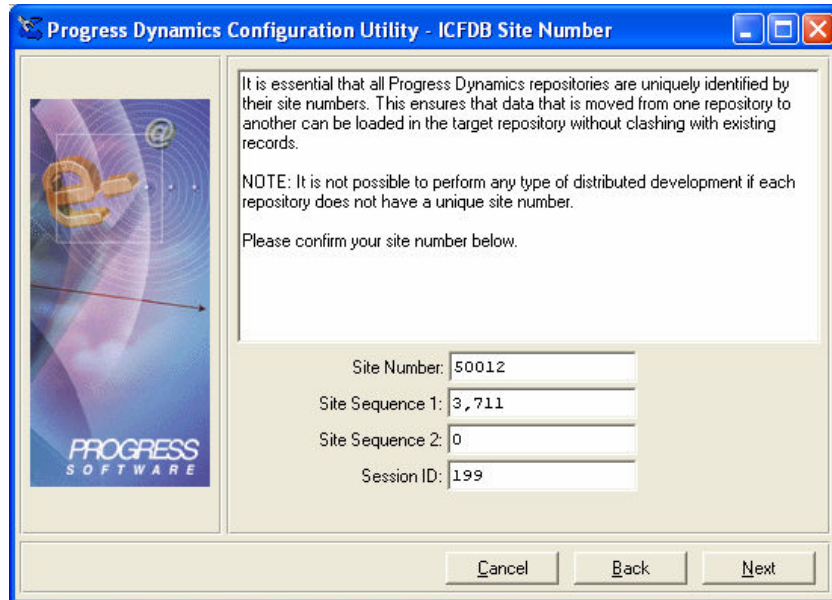
13. The next screen shows the patch levels that will be applied to the ICFDB database.



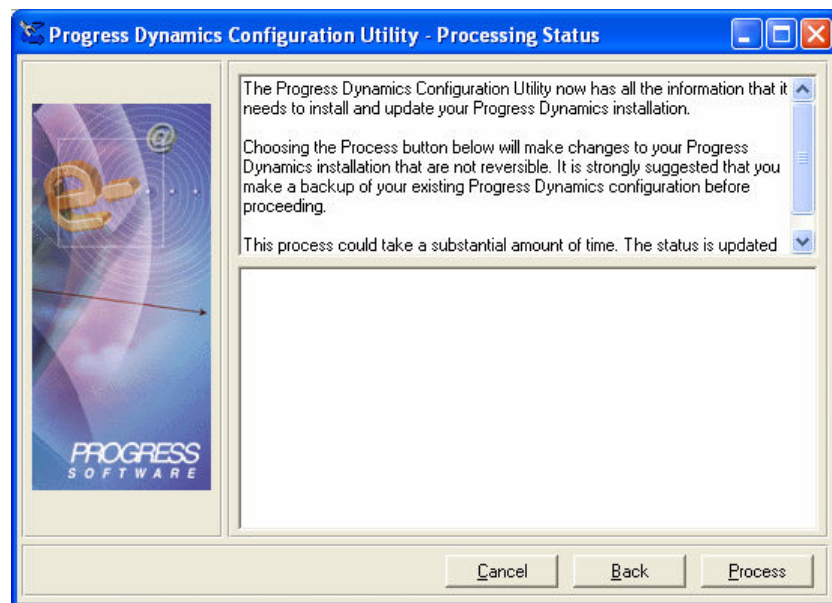
**NOTE:** For this particular update, **these patches do not contain any actual schema changes**. They just result in the database version sequence for the database being updated to the correct level and ado file load information being loaded into the ICFDB repository.

This is because there are no schema changes between OpenEdge 10.0B02 and Dynamics 10.0B03.

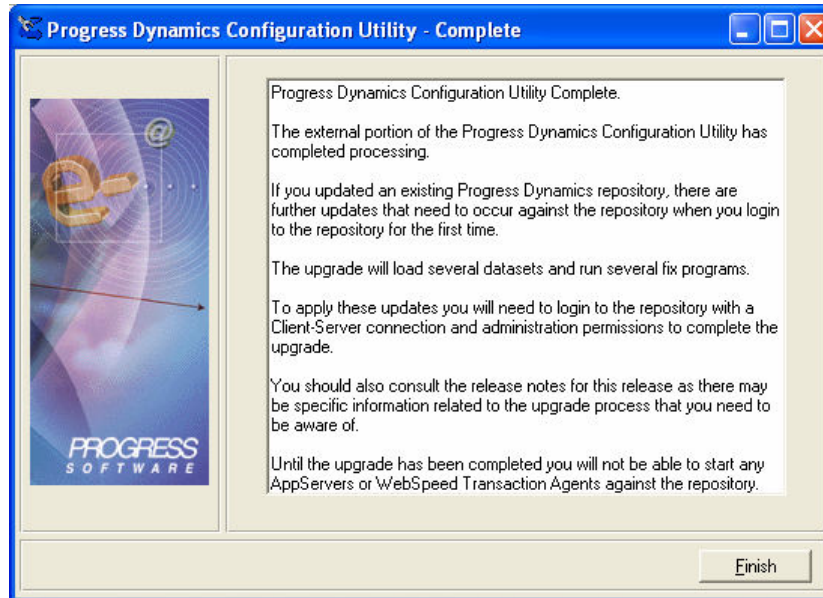
14. The next screen shows ICFDB site number details. These do not need to be changed.



15. Press **Process** to start the update process.



16. When the DCU has completed doing the update (this will be a very fast update and only takes a few seconds) press **Finish**.

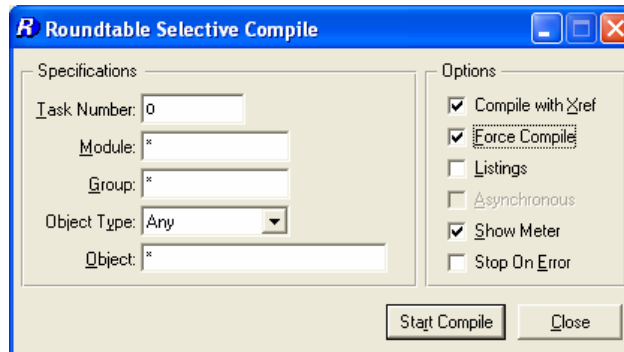


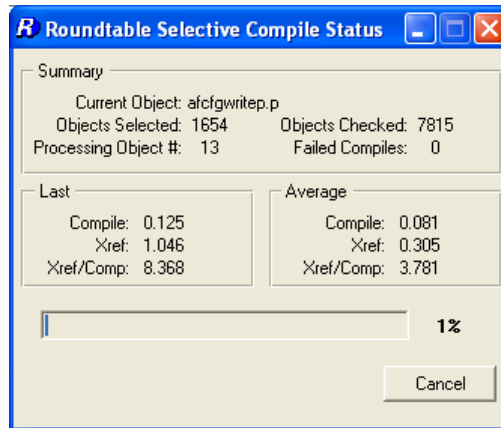
**Reselect the 091dyn-dep workspace and login in as the admin user.** This will launch the second stage of the DCU. The second stage of the DCU loads a number of .ado files into the ICFDB database.

When this load is complete, the ICFDB repository for 091dyn-dep update is complete.

### 3.2.3.3 Recompiling the workspace

Recompile the entire workspace using the **Selective Compile** utility and doing a full forced compile.





### 3.2.4 Importing changes from 091dyn-dep

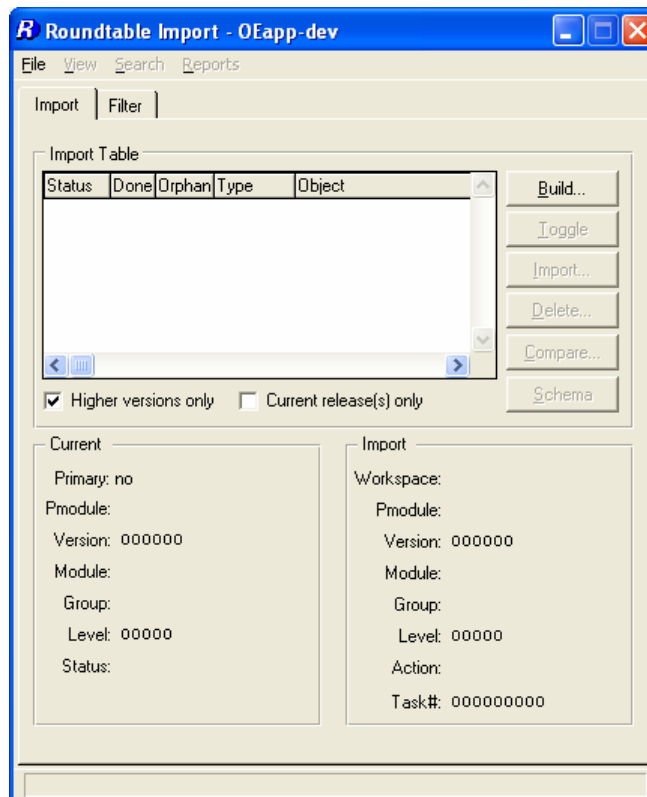
Now that the partner site deployment has been loaded and processed in the 091dyn-dep workspace it is time to import these changes into the next workspace in the flow.

The following example will show how to update a workspace called *dyn-dev* from OpenEdge 10.0B02 to Dynamics 10.0B03.

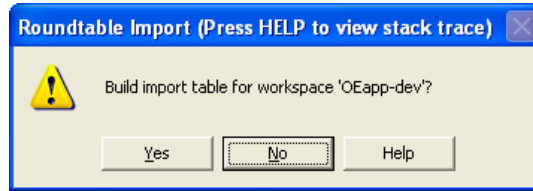
### 3.2.4.1 Importing

Before starting to import the OpenEdge 10.0B03 release into your workspace, make sure that all tasks with customized objects from the Dynamics framework or Roundtable Dynamics integration are completed and that these objects are checked in.

1. Select **Workspace** → **Workspace Import**

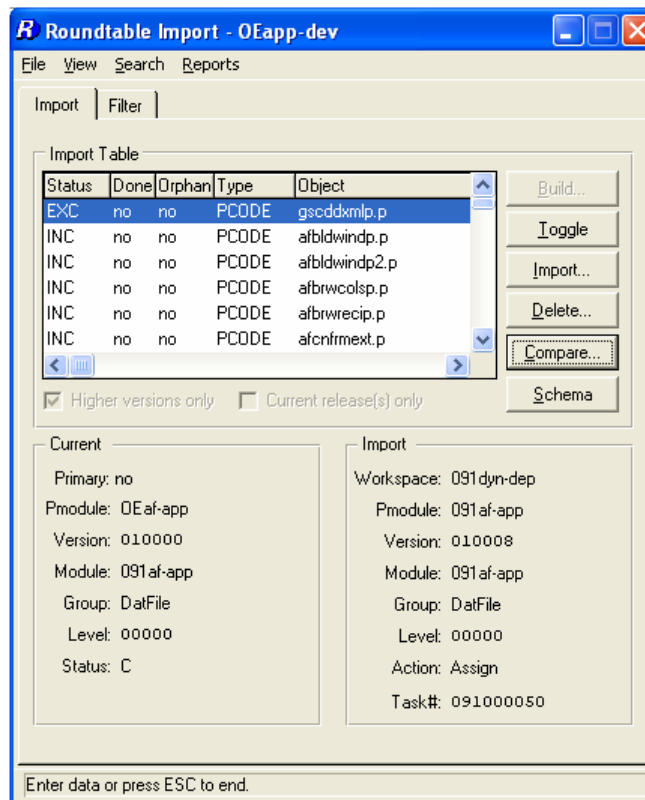


2. Select **Build** to build an import control table.

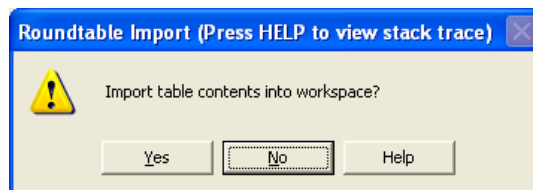


3. Review the contents of the import control table. Especially check the objects with a status of EXC. These will mostly be objects that are to be deleted as part of the import. They may also be objects that have been customized so that custom variant objects exist in the target workspace.

**NOTE:** Custom variant objects, such as *ryrtbevntp.p*, **must be checked in** if they are to be overwritten by the import process. Changing the status from EXC to INC for an object that is WIP will result in the import process being interrupted when Roundtable attempts to import this object.

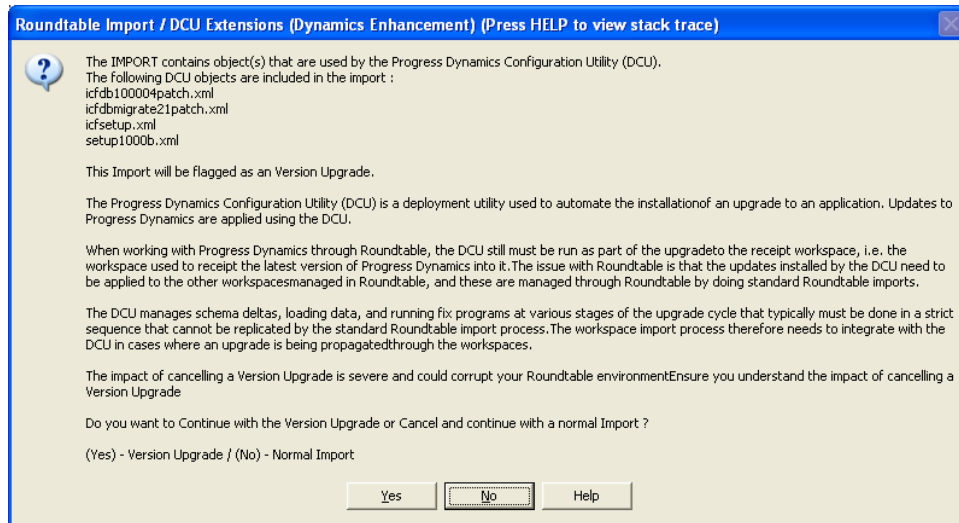


4. Once all of the objects to be imported have a status of INC. Press the **Import** button and select **yes** to perform the import.

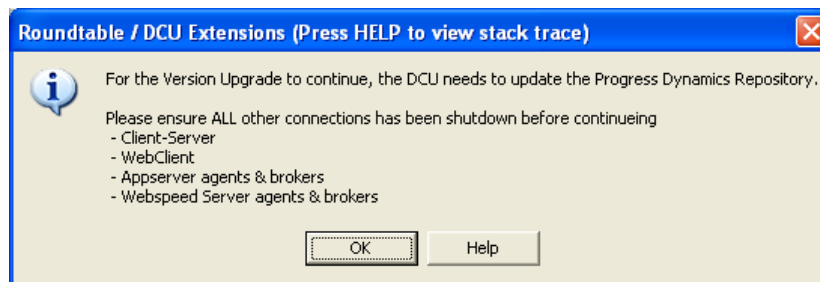




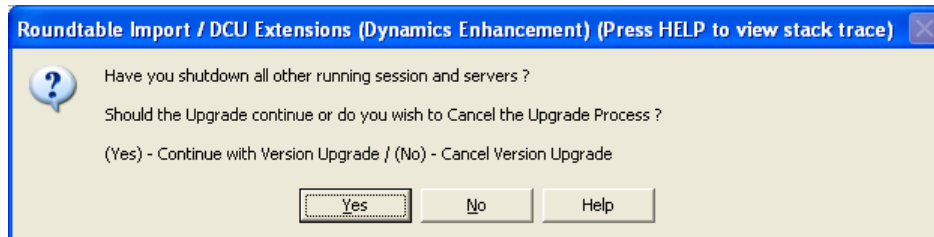
5. If the import process is to be extended with DCU processing to upgrade the workspace ICFDB repository to Dynamics 10.0B03, then answer **yes** to the following prompt. *It is recommended that the DCU run is included in the import processing.*



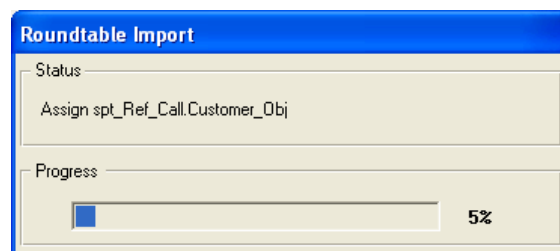
6. Select **OK**.



7. If all processes using the ICFDB repository have been shut down, so that they user doing the import has the only connection to the database, select **yes**.

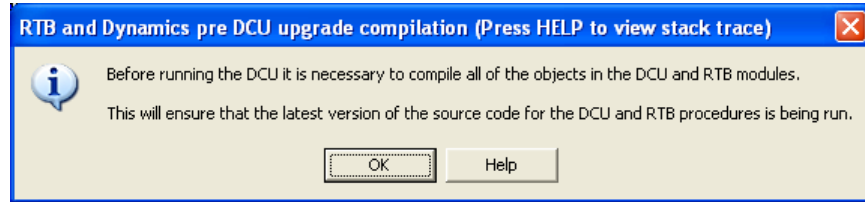


8. The import process is now started.

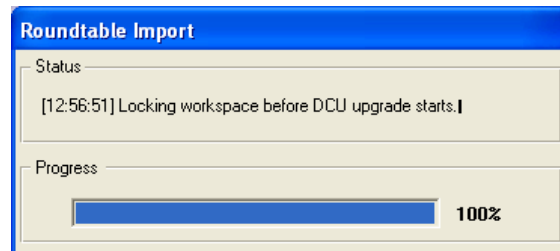




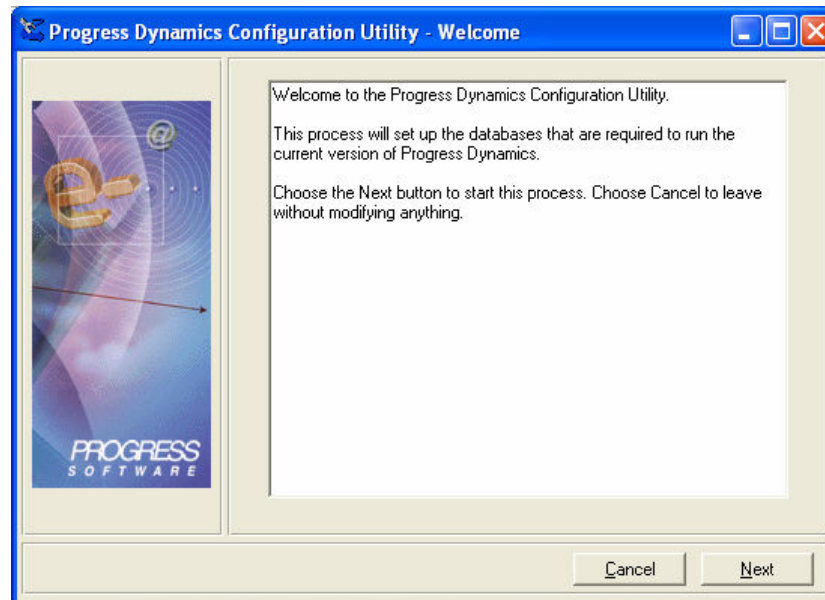
9. Once the import process is completed, the DCU and Roundtable objects have to be recompiled so that the DCU is started with up-to-date r-code. Select **OK**.



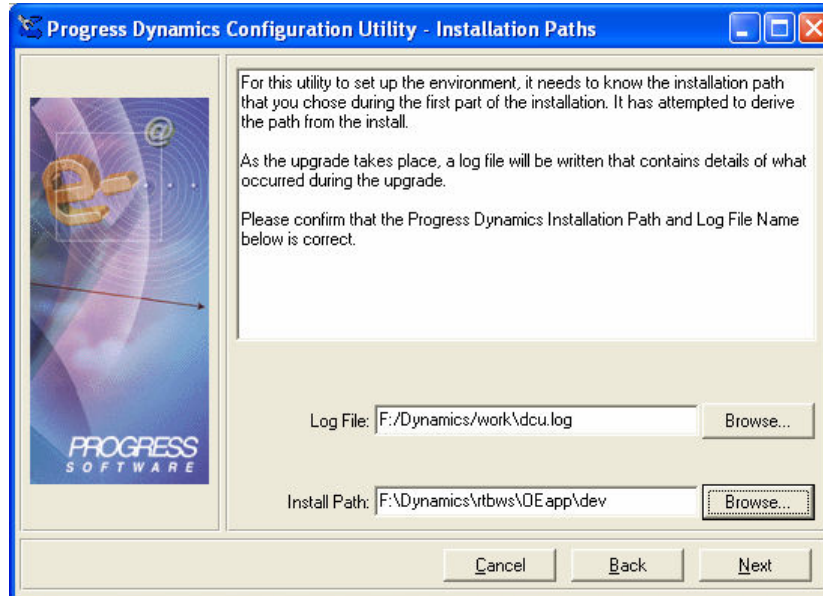
10. Once the compiled is completed a lock is placed on the workspace.



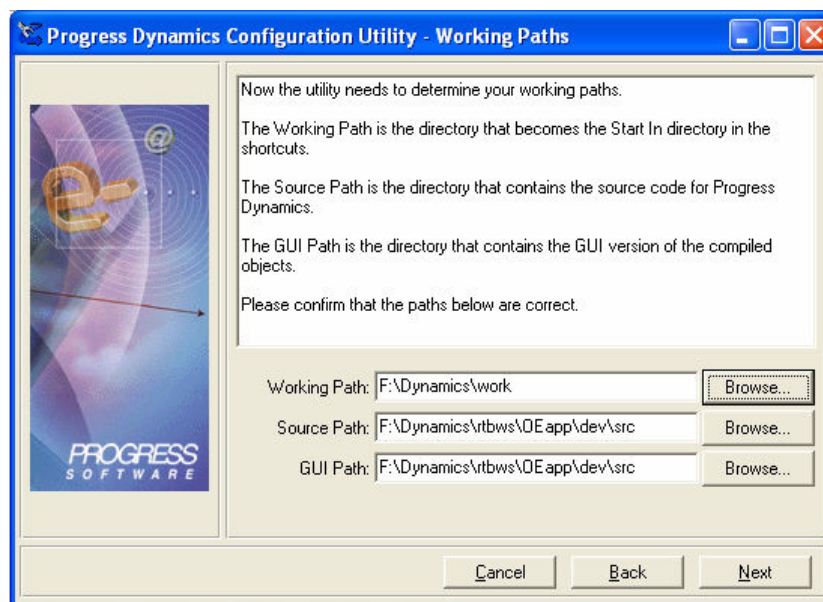
11. The DCU is now launched. Select **Next**.



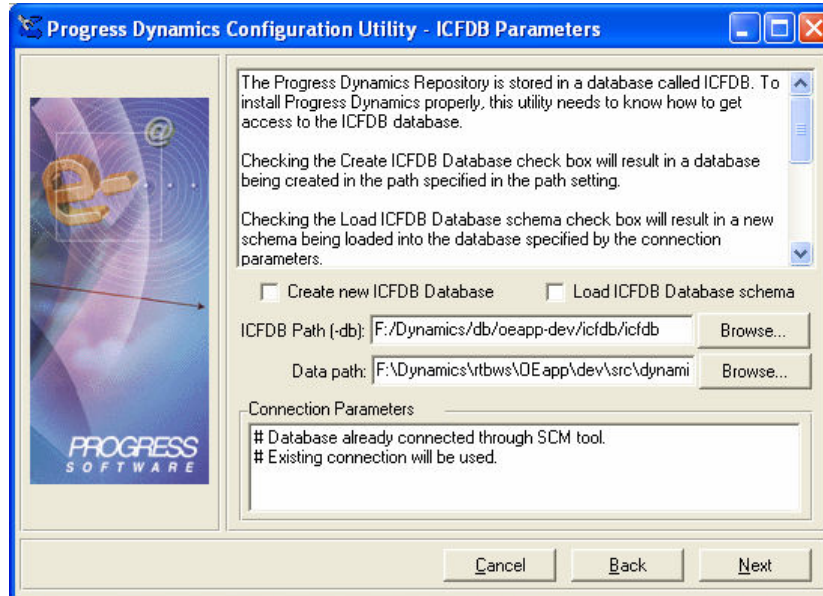
12. Change the **Install path** to be the **workspace root directory** (this is **not** done automatically) and select **Next**.



13. Change the **Source Path** and the **GUI Path** to the same. They must match the <workspace root directory>\src directory, as there is no <workspace root directory>\gui directory.

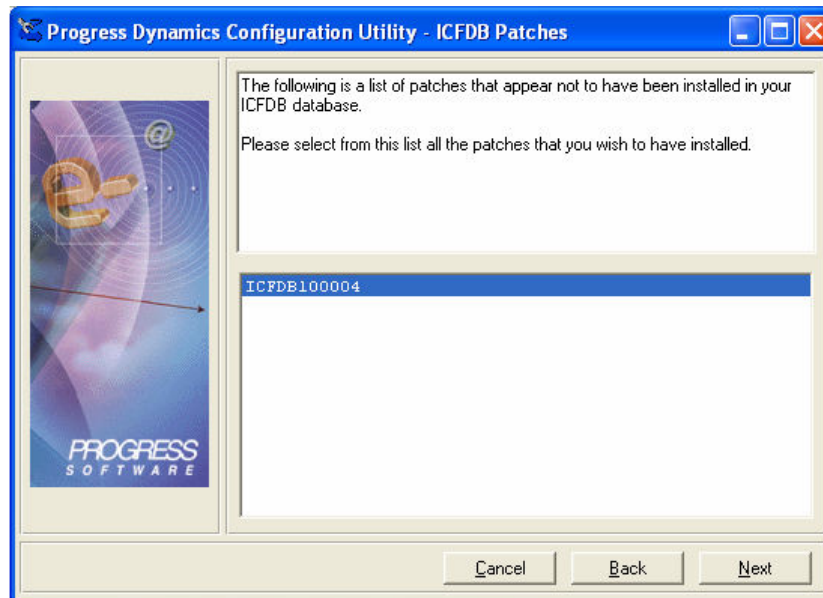


14. The database connection to the **ICFDB database** for the currently selected **workspace** is automatically picked up by the DCU. **Do not change this.**

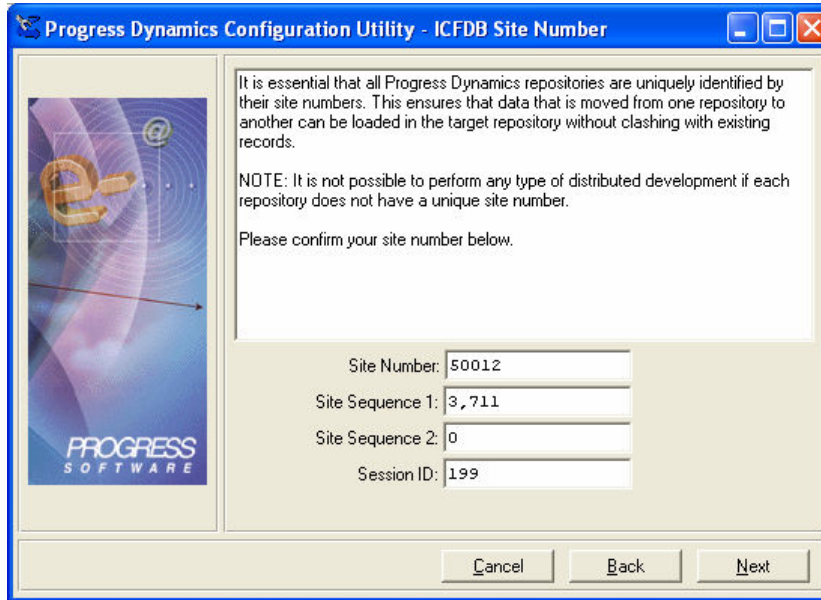


15. Verify that the updates to be applied are correct and select **next**.

An upgrade from OpenEdge 10.0B02 to OpenEdge 10.0B03 includes updates 100004 to the ICFDB database.



16. Verify the site and sequence number settings for the ICFB database and select **next**.



The dialog box is titled "Progress Dynamics Configuration Utility - ICFDB Site Number". It features a logo on the left and a text area on the right. The text area contains the following information:

It is essential that all Progress Dynamics repositories are uniquely identified by their site numbers. This ensures that data that is moved from one repository to another can be loaded in the target repository without clashing with existing records.

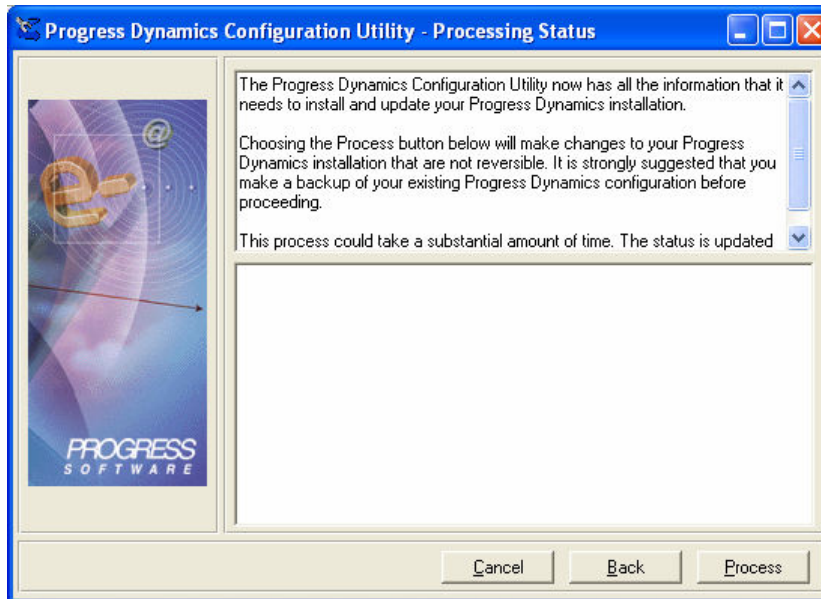
NOTE: It is not possible to perform any type of distributed development if each repository does not have a unique site number.

Please confirm your site number below.

Site Number: 50012  
Site Sequence 1: 3,711  
Site Sequence 2: 0  
Session ID: 199

At the bottom, there are three buttons: "Cancel", "Back", and "Next".

17. Select **process** to start the database update.



The dialog box is titled "Progress Dynamics Configuration Utility - Processing Status". It features a logo on the left and a text area on the right. The text area contains the following information:

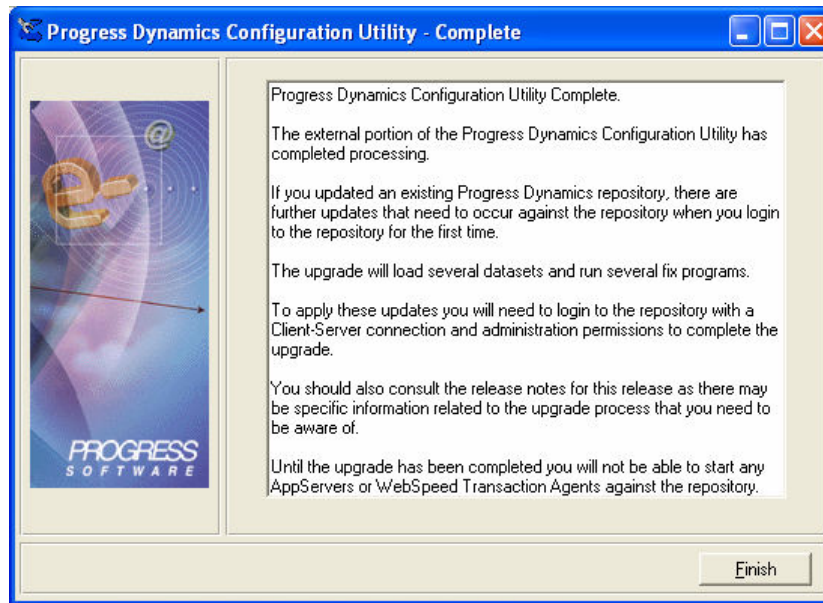
The Progress Dynamics Configuration Utility now has all the information that it needs to install and update your Progress Dynamics installation.

Choosing the Process button below will make changes to your Progress Dynamics installation that are not reversible. It is strongly suggested that you make a backup of your existing Progress Dynamics configuration before proceeding.

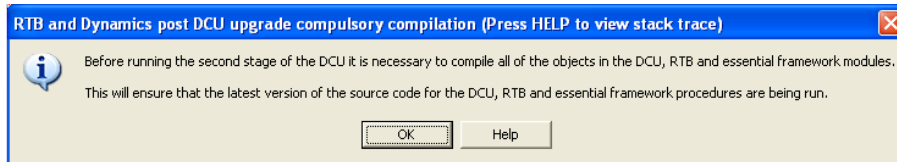
This process could take a substantial amount of time. The status is updated

At the bottom, there are three buttons: "Cancel", "Back", and "Process".

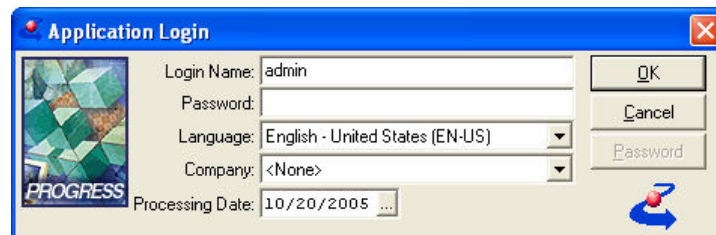
18. Select **Finish**.



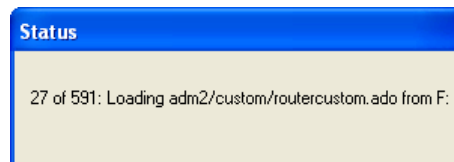
19. Select **OK** to the information message about objects being compiled before the second stage of the DCU is started.



20. When the compiles are completed, login to the Dynamics framework as the admin user.

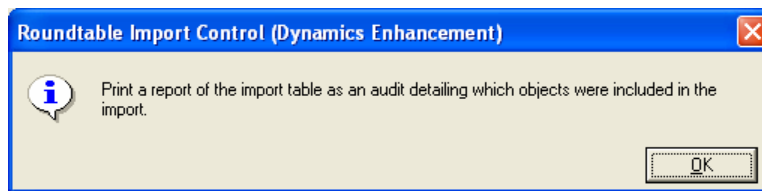


21. This will start the processing for the 2<sup>nd</sup> stage of the DCU, which includes loading new and changed .ado files.

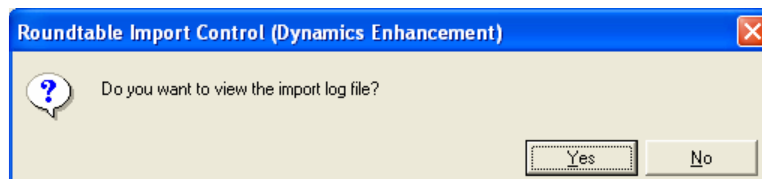


If there are no errors during the ado load, the workspace has been updated to Dynamics 10.0B02.

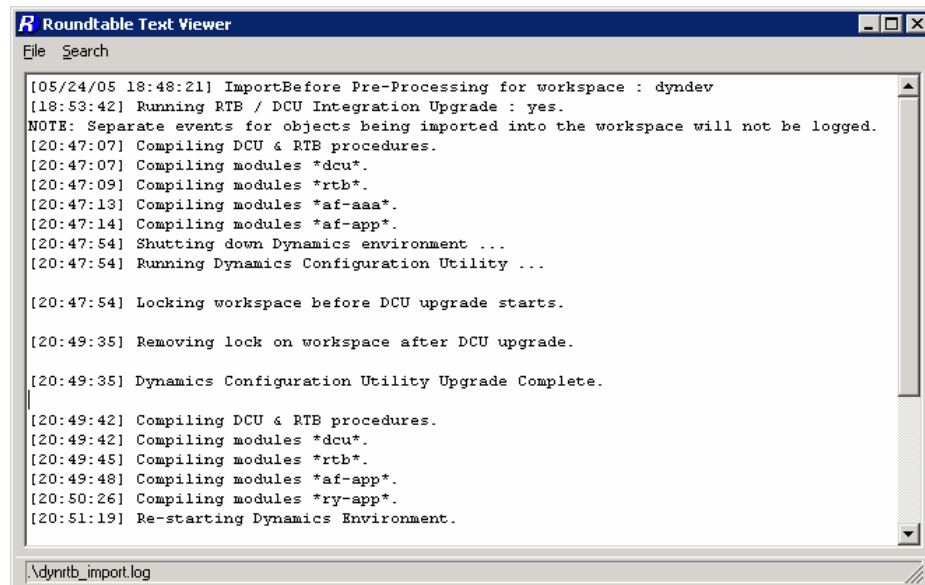
22. The import processing is now complete. Select **OK**.



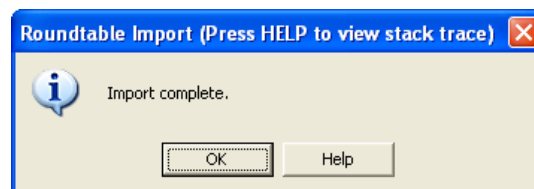
23. If you wish to see the contents of the extended import log file created during the import process, select **yes**.



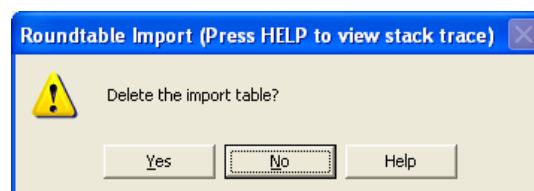
This launches the Roundtable text viewer with the log file open.



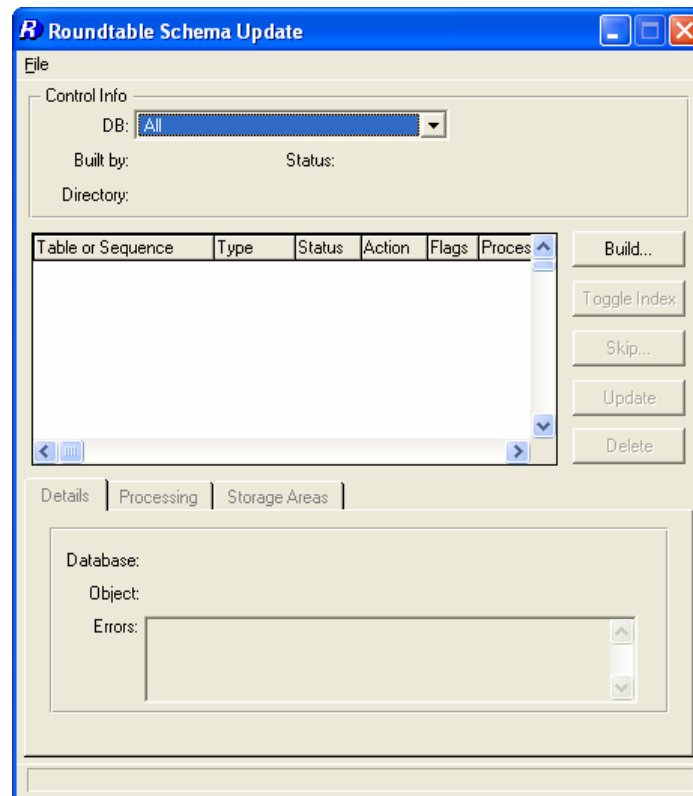
24. Press **OK**.



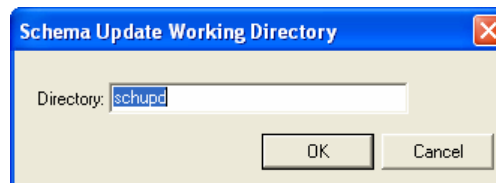
25. Delete the import table by pressing the **delete** button and answering **yes** to the next prompt.



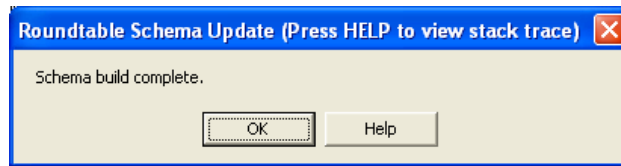
26. The status of the newly imported schema objects have to be updated using the Schema Update Process. Select **Workspace → Update Schema**.
27. Select the **Build** button.



28. Leave the schema update directory with the default settings and press **OK**.

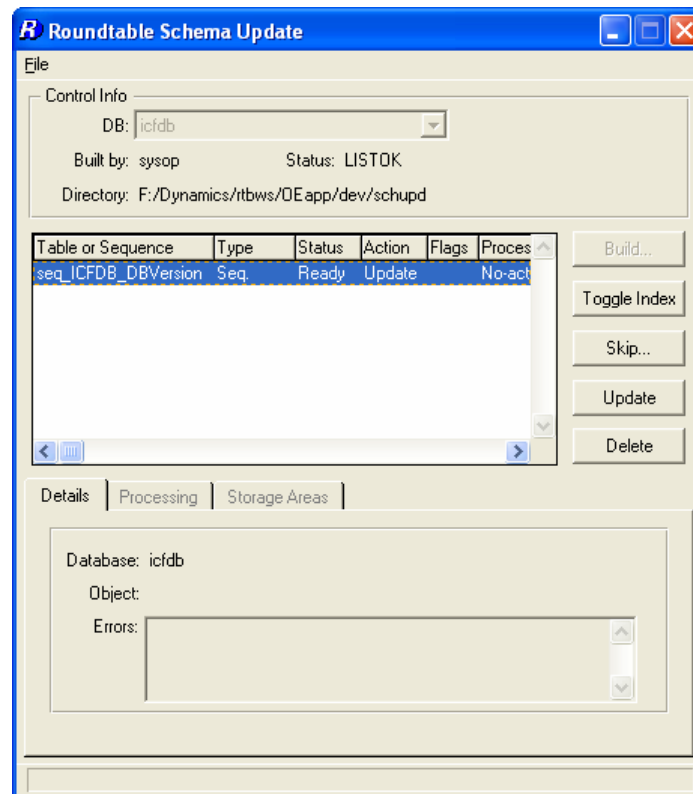


29. Press **OK**.



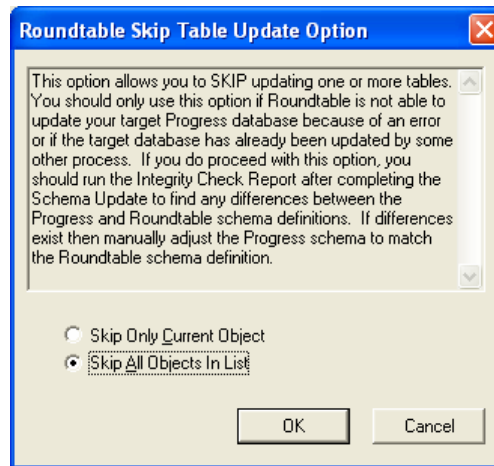
30. The updates to the ICFDB database need to be skipped, as they do not need to be applied to the physical schema by Roundtable (they have already been applied by the DCU).

31. Press the **Skip** button.

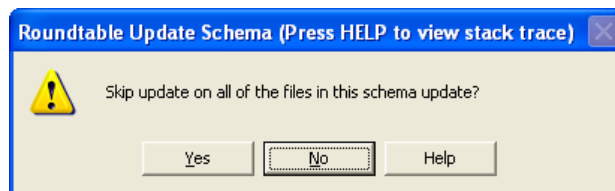




32. Press the **Skip All** Object in List and press **OK**.

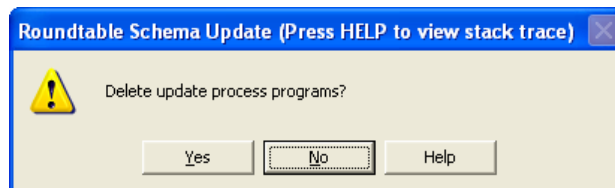
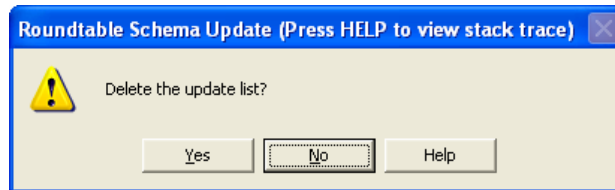


33. Select **yes**.



34. Select **update** and press **OK** when done to complete the processing.

35. **Delete** the contents of the schema update table and process programs.



36. Perform a full forced selective compile on the workspace to make sure that all of the updated objects and affected objects are updated correctly.

The workspace has now been completely upgraded to Dynamics 10.0B03.

## 4 Technical Support

### 4.1 Dynamics Support

Issues with core Dynamics functionality and upgrading Dynamics repositories or code, which do not have anything to do with the use of Roundtable and Dynamics should be directed to Progress Software Corporation's Technical Support.

<http://www.progress.com/support>

### 4.2 Roundtable Dynamics Support

The Roundtable Dynamics integration using Roundtable 10.0A02 or higher and OpenEdge 10.0B01 or higher is now supported by Roundtable Technical Support.

The following kinds of issues can be directed to Roundtable Technical Support:

- Issues related to the use of the core Roundtable product
- Issues related to the use of the Roundtable Dynamics integration
- Enhancement requests to Roundtable or the Roundtable Dynamics integration

Contact details for Roundtable Technical Support can be found at:

<http://www.roundtable-tsms.com/support>.