

## Upgrade Hub and Interact


Upgrading Hub and Interact is a simple process that uses dedicated tools. You need to run the upgrade tools in the following order, starting with the version you are currently using:

- Upgrade from 4.0 to 4.1.
- Upgrade from 4.1 to 4.2.
- Upgrade from 4.2 to 4.3.

### Upgrade Hub and Interact 4.0 to version 4.1

#### Prerequisites

- Version 4.0 of Hub and Interact is installed.
- Everyone is logged out of the IMS Server. It is recommended that you schedule the upgrade to take place outside of working hours.
- You have backed up all relevant databases. Although the databases are not impacted by the upgrade, it is recommended that databases are backed up before performing any upgrade.

 The upgrader automatically stops any running websites as part of the upgrade process. You do not need to manually stop them.


#### Upgrade steps

1. Download the Blue Prism Interact and Hub Upgrader for version 4.0 to 4.1 from the [Blue Prism Portal](#).
2. Run the upgrader and follow the instructions.
3. Once the upgrader has completed, log in to Hub and open the plugin repository.  
The repository will show that there are plugins ready to update with details of the currently installed and available versions displayed.
4. Select the **All** check box and click **Complete updating**.  
The new versions of the selected plugins are installed and the upgrade to version 4.1 is complete.
5. Repeat the process on all machines on which Hub is installed.

## Upgrade Hub and Interact 4.1 to version 4.2

### Prerequisites

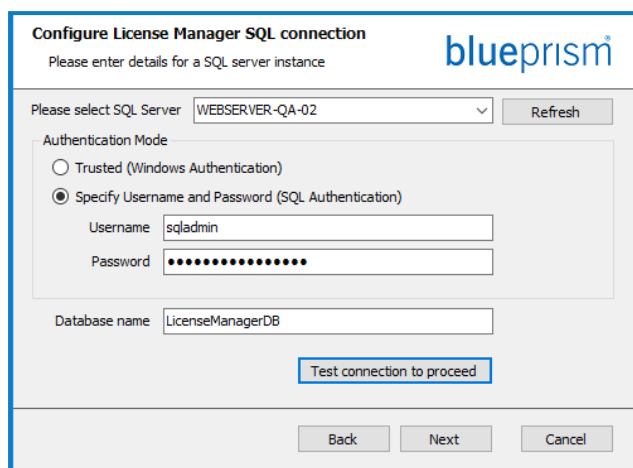
- Version 4.1 of Hub and Interact is installed.
- Everyone is logged out of the IMS Server. It is recommended that you schedule the upgrade to take place outside of working hours.
- You have backed up all relevant databases. Although the databases are not impacted by the upgrade, it is recommended that databases are backed up before performing any upgrade.
- You have created DNS records for the License Manager and Notification Center to use during this upgrade. This prerequisite is not required for single machine environments.
- SSL certificates for the new web sites; License Manager and Notification Center. See the [Hub Install Guide](#) for more information about SSL certificates.
- You have sufficient database permissions to configure the new databases created as part of this upgrade, such as, dbcreator or sysadmin.
- 2 GB of free disk space – This is required for the backup that is created until the installation process is complete.

 The upgrader automatically stops any running websites as part of the upgrade process. You do not need to manually stop them.

### Upgrade steps

1. Download the Blue Prism Interact and Hub Upgrader for version 4.1 to 4.2 from the [Blue Prism Portal](#).
2. Unzip the installer on the machine where Hub and Interact 4.1 are installed. It contains two files:
  - Blue Prism Interact and Hub Upgrader.exe – The upgrader executable.
  - BluePrismHubAndInteractUpdate4.2.bin – The binary file needed to upgrade to 4.2.You must ensure these files are saved in the same directory.
3. Double-click the upgrader to start the upgrader wizard, and on the Welcome to the Hub and Interact Upgrader screen, click **Next**.
4. On the End-User License Agreement screen, read the End-User License Agreement and if you agree to the terms, select the check box and click **Next**.

## 5. On the Configure License Manager SQL connection screen:

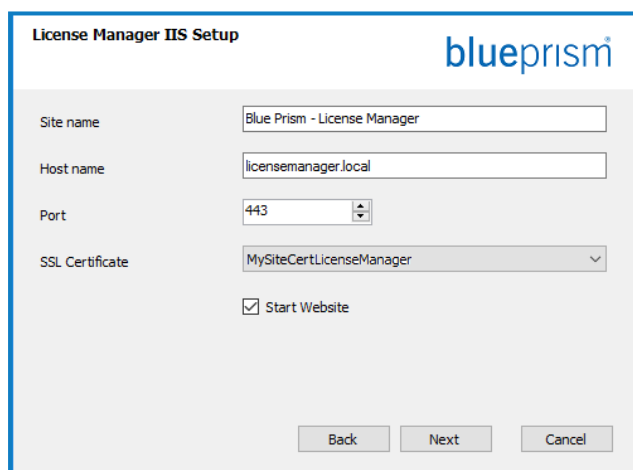


- a. Configure the settings for the License Manager database by providing the SQL Server host name or IP address and the credentials for the account to create the database:
  - If **Windows Authentication** is selected, the account must have the appropriate permissions.
  - If **SQL Authentication** is selected, enter the username and password.

The database name can be left as the default value or changed as required.


- b. Click **Test connection to proceed** to test the SQL credentials and verify connectivity.  
A notification will display the result of the test. You will only be able to move on to the next step if the test is successful.
- c. Click **Next**.

## 6. On the License Manager IIS setup screen:



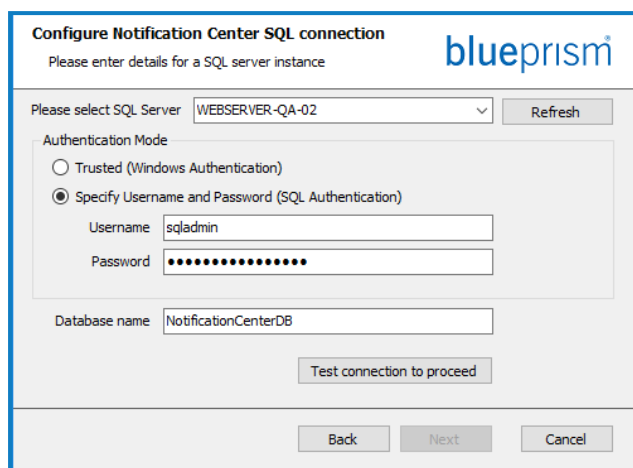
- a. Configure the License Manager website.

You need to:

- Enter a site name.
  - Enter a host name in lowercase characters – This will be used as the URL for the site. The first part of the default host name must not be changed. You can only change the `.local` part of the host name. Ensure that you consider your DNS and Domain structure when choosing a host name.
-  The use of uppercase characters in URLs is not supported.
- Enter the port number.
  - Select the appropriate SSL certificate.
  - Leave **Start Website** selected, unless you do not want the website to automatically start at the end of the installation.

- b. Click **Next**.

## 7. On the Notification Center SQL connection screen:



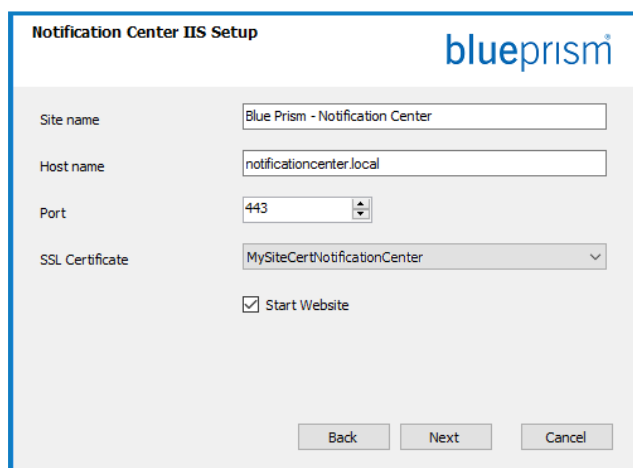
- a. Configure the settings for the Notification Center database by providing the SQL Server host name or IP address and the credentials for the account to create the database:

- If **Windows Authentication** is selected, the account must have the appropriate permissions.
- If **SQL Authentication** is selected, enter the username and password.

The database name can be left as the default value or changed as required.


- b. Click **Test connection to proceed** to test the SQL credentials and verify connectivity.  
A notification will display the result of the test. You will only be able to move on to the next step if the test is successful.
- c. Click **Next**.

## 8. On the Notification Center IIS setup screen:



- a. Configure the Notification Center website.  
You need to:

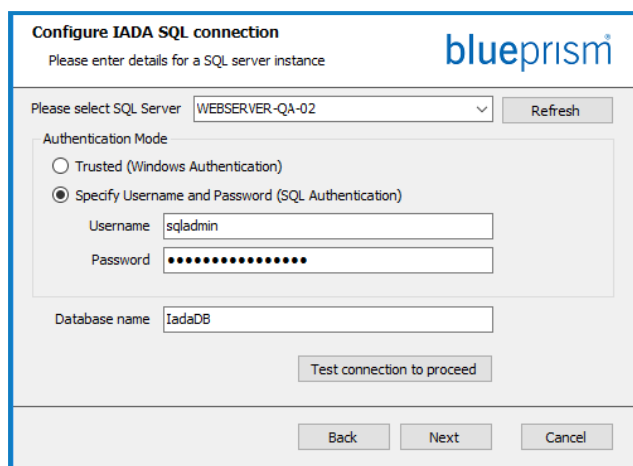
- Enter a site name.
- Enter a host name in lowercase characters – This will be used as the URL for the site. The first part of the default host name must not be changed. You can only change the *.local* part of the host name. Ensure that you consider your DNS and Domain structure when choosing a host name.

 The use of uppercase characters in URLs is not supported.

- Enter the port number.
- Select the appropriate SSL certificate.
- Leave **Start Website** selected, unless you do not want the website to automatically start at the end of the installation.

- b. Click **Next**.

9. On the Configure IADA SQL configuration screen:



- a. Configure the settings for IADA by providing the SQL Server host name or IP address and the credentials for the account to create the database:
  - If **Windows Authentication** is selected, the account must have the appropriate permissions.
  - If **SQL Authentication** is selected, enter the username and password.

The database name can be left as the default value or changed as required.

- b. Click **Test connection to proceed** to test the SQL credentials and verify connectivity.

A notification will display the result of the test. You will only be able to move on to the next step if the test is successful.
- c. Click **Next**.

10. On the Ready for Upgrade to 4.2 screen, click **Next** to upgrade Hub and Interact to 4.2.

11. On the Completed the Blue Prism Hub and Blue Prism Interact upgrade screen:

- When the upgrade completes successfully, click **Finish**.
- If the installation failed, the **View Log** option will give you details of the error that was encountered. For more information, see [Troubleshooting upgrades](#).

## 12. Ensure the database permissions for the new databases are:

Application name	Example service account name for SQL Windows Authentication	SQL Server permissions required during installation	Database permissions required during application running	Default database name
Blue Prism - Notification Center	IIS APPPOOL\Blue Prism – Notification Center	dbcreator / sysadmin	db_datawriter / db_datareader	NotificationCenterDB
Blue Prism - License Manager	IIS APPPOOL\Blue Prism – License Manager	dbcreator / sysadmin	db_owner  Or db_datawriter / db_datareader with <a href="#">execute permissions</a> (see below)	LicenseManagerDB

When the application is running, the License Manager requires appropriate permissions to execute stored procedures. If you do not want to use db\_owner as the permission level, you can use db\_datawriter/db\_datareader and run the following SQL script to provide the required level to that user:


```
USE [LicenseManagerDB]
GRANT EXECUTE to "IIS APPPOOL\Blue Prism - License Manager"
```

Where:

- [LicenseManagerDB] is the database name for License manager.
- "IIS APPPOOL\Blue Prism - License Manager" is the username.

## 13. If using Windows Authentication:

- Change the Application Pools Identity of the newly installed License Manager and Notification Center to match the Application Pools that already exist for Hub and Interact.
- Give the Identity, under which the IIS pools run, access to the BPC\_SQL\_CERTIFICATE certificate. To do this, open Manage Computer Certificates from the Windows taskbar. In the Personal folder, right-click the certificate and select **All tasks > Manage Private Keys**. Add the user that matches the Identity and give the user Full control.

 Access to this certificate is required by Identity running the Blue Prism – Hub and Blue Prism – IADA Application Pools.


- Check the file permission is set to Full Control for the service account on the new folders:
  - C:\Program Files (x86)\Blue Prism\Notification Center
  - C:\Program Files (x86)\Blue Prism\License Manager.

## 14. Restart the RabbitMQ Service.


## 15. Restart all Application Pools.

## 16. Restart IIS.

## 17. Repeat the process on all machines on which Hub is installed.


 The plugins are automatically updated to the latest version as part of the upgrade process.

## Upgrade Hub and Interact 4.2 to version 4.3

 In 4.3, IMS has been replaced with Authentication Server, any new installs will create a URL, Application Pool and database name that reflect this change. Using this upgrader, only the IMS folder and site name are changed from IMS to Authentication Server, however, your Application Pool, URL and IMS database name remain unchanged. It will also rename the Blue Prism – Email Sender site to Blue Prism – Email Service, however, the address remains unchanged. It is important that everyone is logged out of the IMS Server when you perform this upgrade.

### Prerequisites

- Version 4.2 of Hub and Interact is installed.
- Everyone is logged out of the IMS Server. It is recommended that you schedule the upgrade to take place outside of working hours.
- You have backed up all relevant databases. Although the databases are not impacted by the upgrade, it is recommended that databases are backed up before performing any upgrade.
- Sufficient database permissions to configure the new database created as part of this upgrade, such as, dbcreator or sysadmin.
- 2.5 GB of free disk space – This is required for the backup that is created until the installation process is complete. Remove any backups from any previous upgrades.

 The upgrader automatically stops any running websites as part of the upgrade process. You do not need to manually stop them.

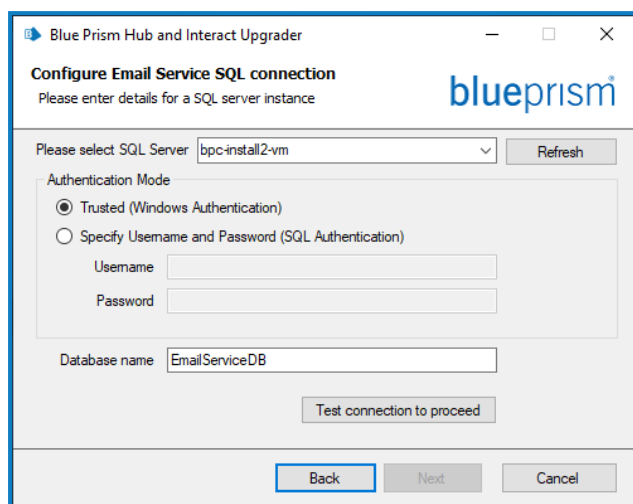
### Upgrade steps

1. Download the Blue Prism Interact and Hub Upgrader for version 4.2 to 4.3 from the [Blue Prism Portal](#).
2. Unzip the installer on the machine where Hub and Interact 4.2 are installed. It contains two files:
  - Blue Prism Interact and Hub Upgrader.exe – The upgrader executable.
  - BluePrismHubAndInteractUpdate4.3.bin – The binary file needed to upgrade to 4.3.

You must ensure these files are saved in the same directory.

3. Double-click the upgrader to start the upgrader wizard, and on the Welcome to the Hub and Interact Upgrader screen, click **Next**.
4. On the End-User License Agreement screen, read the End-User License Agreement and if you agree to the terms, select the check box and click **Next**.

## 5. On the Configure Email Service SQL connection screen:

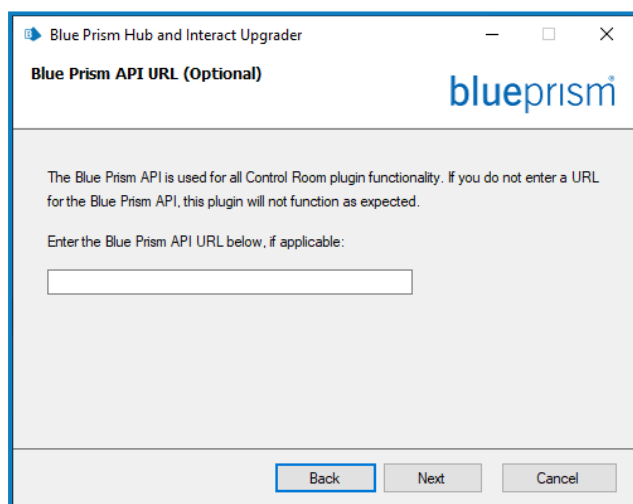


- a. Configure the settings for the Email Service database by providing the SQL Server host name or IP address and the credentials for the account to create the database:
  - If **Windows Authentication** is selected, the account must have the appropriate permissions.
  - If **SQL Authentication** is selected, enter the username and password.

The database name can be left as the default value or changed as required.

- b. Click **Test connection to proceed** to test the SQL credentials and verify connectivity.  
A notification will display the result of the test. You will only be able to move on to the next step if the test is successful.
- c. Click **Next**.

## 6. On the Blue Prism API URL (Optional) screen:



If required, enter the URL for the Blue Prism API. This URL is essential if you want to use the Control Room plugin. The Control Room plugin is compatible with Blue Prism 7.0 or later.

If you decide to use the Control Room plugin and you have not entered a URL at this point, you will need to update the configuration file. For more information on how to do this, see the [Troubleshoot a Hub installation](#) section in the [Blue Prism Hub install guide](#).

7. On the Ready for Upgrade to 4.3 screen, click **Next** to upgrade Hub and Interact to 4.3.

## 8. On the Completed the Blue Prism Hub and Blue Prism Interact upgrade screen:

- When the upgrade completes successfully, click **Finish**.
- If the installation failed, the **View Log** option will give you details of the error that was encountered. For more information, see [Troubleshooting upgrades](#).



9. Ensure the database permissions for the new database is:

Application name	Example service account name for SQL Windows Authentication	SQL Server permissions required during installation	Database permissions required during application running	Default database name
Blue Prism - Email Service	IIS APPPOOL\ Blue Prism – Email Service	dbcreator / sysadmin	db_datawriter / db_datareader	EmailServiceDB

10. Restart the RabbitMQ Service.
11. Restart all Application Pools.
12. Restart IIS.
13. Repeat the process on all machines on which Hub is installed.



The plugins are automatically updated to the latest version as part of the upgrade process.

## Upgrade Interact API VBO

The Interact API VBO is used within the Blue Prism interactive client, and it is updated independently to utilize any new features within the Interact API Service that are available when Interact is upgraded. The latest version of the VBO is available in the Interact API Service release zip file on the [Blue Prism Portal](#).

To upgrade the VBO, you only need to update the Utility - Interact VBO:

1. Download the Interact API Service release file from the [Blue Prism Portal](#).
2. Unzip the Interact API Service release file.
3. In the Blue Prism interactive client and select **File > Import > Release/Skill**.

The Choose the input file screen displays.

4. Click **Browse** and select the extracted Interact API Release.bprelease file, then click **Next**.

The Resolve Import Conflicts screen displays.

5. In the **Resolution** column:

- a. Leave the setting for **Utility - Interact API** as **Overwrite the existing business object**.
- b. Change the settings for all the other components to **Don't import this business object**.

6. Click **Next**.

The Process logging overview screen displays.

7. Ensure that only **Utility - Interact API** is listed for import. If:

- Other components are listed, click **Back** and change the settings as detailed in step 5 above.
- It is the only component, click **Next** to complete the import.

8. Click **Finish**.

## Troubleshooting upgrades

### **The upgrade says it ended prematurely, what happens now.**

The upgrade process has been designed so that if a failure is encountered, it rolls back the install and reinstates the version you were upgrading from. During the upgrade, the folder *backup\_4.n* is created in the installation location (by default, C:\Program Files (x86)\Blue Prism\), where *4.n* reflects the existing version number. This contains a copy of the existing installed files and is used as the roll back source if an error is encountered during the installation.

You can try running the upgrader again. Before retrying an upgrade, read any error messages and log files created during the upgrade and ensure any issues have been addressed before attempting the upgrade again.

If this issue persists, please contact Blue Prism Support.

### **I have upgraded to version 4.3 but the 4.1 user interface still displays.**

If this is encountered, clear your browser cache and reload the page.

### **Following an upgrade, when I attempt to log into Interact or Hub, I am seeing an error related to SignalR about overloading the web server in IIS.**

This error is very rare but if it does occur, reload the site and restart the application pools in IIS.

### **I canceled an installation during the upgrade process and I am now seeing errors.**

It is recommended that installations are not canceled during the upgrade process. However, although errors may be seen, the rollback operation will complete successfully.