

Upgrade guide

Overview: This guide will provide the definitive steps that should be followed when upgrading an Evoq Engage, Evoq Content, or Evoq Content Basic website to the most recently released version (version 8.4.2 at time of writing). The minimum recommended version for using the steps in this guide is Evoq 7.0.0. For sites on version 6.2.9 and older, please contact support and mention the version number explicitly. The version number of any currently running website can be found under Host > Host Settings

Target Audience: This guide is written for website administrators and system users who are familiar with DNN Platform and Evoq Content. If there are questions about terminology or certain components, it is suggested to refer to the DNN Platform and Evoq Content Super User and Administrator documents. You can always contact the Evoq Support Team at any point to get feedback or answers regarding the upgrade process, or if you encounter and problems along the way.

Prerequisite Steps:

1. Before you start planning the upgrade, you need to check the minimum system requirements for the target version. The latest system requirements can be found on this page: (dnnsoftware.com)
2. Since a site upgrade is a major undertaking, which can drastically impact the functionality of your site, creating a full backup is imperative. Even with a routine backup procedure in place, a new database backup should be created and verified. In addition, a full copy of the website directory should be added to a compressed .zip file, moved to an external location, and verified for extraction.
3. It is always recommended that a full upgrade is performed in a test environment before upgrading a live website. Even with the best laid plans, sometimes upgrades do not succeed on the first try. To minimize downtime of the live site, performing the upgrade(s) on a test environment is preferred.
 - a. The test environment should mimic the live site as closely as possible. It can even be a second IIS site on the same server if needed.
 - b. The database backup should be deployed as a new database in SQL Server.
 - c. The new IIS site should use a new application pool and identity.
 - d. Double check that the new application pool identity has permission to access the entire website directory and database.
 - e. If your website is a web farm, you do not need to replicate multiple servers in the test environment. When upgrading a web farm, the upgrade is performed with only a single server enabled, to avoid conflicts.

4. The following are additional considerations to be made regarding the test website, taking into account the forthcoming upgrade.
 - a. Keeping the same portal alias as the live site can be accomplished by adding it to the machine's 'hosts' file. Alternatively, a 'localhost' binding and portal alias can be used.
 - b. The site can be activated using the production license key, by switching the activation type drop down list to Development.
 - c. Navigate to Host > Schedule and set the Schedule Mode to Disabled. This is to ensure that any automated tasks do not execute during the upgrade.
 - d. Open the web.config file and confirm that the `<add key="AutoUpgrade" value="false">` node is set to "false".
 - If your web.config is substantially different from a default web.config, you may encounter problems during the upgrade. For example, if you have any external .config files which contain parts of a default web.config, the application may not be able to access those nodes.
 - The application needs to make changes to the web.config file during the upgrade, so it is best to make sure that it is not open in any other applications or write-locked for any reason.
5. Navigate to Host > Extensions and make a list of all 3rd party modules.
 - a. Each individual 3rd party module may need to be upgraded. You will need to check with the specific module developers/vendors to see if there is a newer version of the module available for the version of Evoq that you are currently on. Additionally you can check if there is a new version which will be compatible with the target version after upgrading.
 - b. Some modules (i.e. XML & Iframe) place files in the App_Code directory of the website. These files can be problematic during the upgrade. You can remove those folders from the App_Code folder before the upgrade. After the upgrade, ensure you are using the most recent version of these modules.
 - c. Some modules will encounter the breaking changes listed here: (dnsoftware.com) Individual consideration will need to be taken based on which issues are encountered. Help from either the Evoq Support Team or the module's vendor/developer can be enlisted to address these issues.
6. Once you have completed these steps, and confirmed the test site is functioning as a clone of the production site, create a new backup of the database and the file system, so that you can roll back to this point easily if needed.

Site Upgrade Procedure:

1. Open the root directory of the website and delete the /install/ directory. This is to ensure that no files from previous versions attempt to install themselves during the site upgrade.
2. Visit the Evoq Support downloads page here (dnsoftware.com) and click the "Upgrade" button next to the desired edition to download the latest Upgrade package.

- a. Certain security configurations in Windows require that you “unblock” the .zip file after it has been downloaded. To accomplish this, right click on it and view the properties. If there is an “unblock” button visible, click it. Otherwise continue.
3. Extract the contents of the .zip file to a new folder.
4. Copy the contents of this new folder over the test website directory, preserving the folder structure. When prompted, elect to merge all folders and overwrite all existing files.
5. Once all the files have been copied, access this specific url: <http://localhost/install/install.aspx?mode=upgrade>
 - a. Note that if you are using a hosts file entry, as described in the previous section, you would use that fully qualified domain name instead of ‘localhost’
 - b. It is also worth noting here that there is a wizard that can be used instead of this verbose mode, but in general this method is easier to diagnose in the event of unexpected errors.
6. The installation process will begin as soon as the install.aspx page loads
 - a. If you receive ANY errors, take screen shots of the install.aspx page. Once the process completes, either in failure or success, open the /portals/_default/logs directory and create a copy of the InstallerLog{Today’s Date}.resources and {Today’s Date}.log.resources. Move these files to a safe location and contact the Evoq Support Team. Any installation that receives an error should be rolled back to the initial state and reattempted. A website that had errors during the upgrade process may appear to be fully functional, only to display unexpected behavior later on.
 - Some common errors include individual module errors, SQL server database connection problems, 500 errors or permissions errors. Every error is a little bit different and will require troubleshooting.
 - In certain cases, it may be required to upgrade to an intermediary version instead of directly to the latest version. For example if you are on version 7.1.2 you could be asked to upgrade to version 7.3.4 first, before proceeding to the latest version. This will depend on the exact errors received, and be prescribed at the discretion of the Evoq Support Team.
 - b. If you received no errors during the installation, proceed to the site by clicking the link at the bottom of the install.aspx page and continue following this guide
7. Login and visit all important pages to confirm their functionality.
 - a. If you encounter errors which only happen on certain pages, they may be due to 3rd party modules which have been affected by the site upgrade. Make sure again that you are using the most recent version of the module to ensure compatibility.
 - b. Any error you encounter can be reported to the Evoq Support Team for assistance and troubleshooting. A site rollback may be required, but it will depend on the error message itself.
8. You can now re-enable the schedule at Host > Schedule by setting the Schedule Mode to Timer, if you disabled it previously.

9. Navigate to the /install/ directory in the file system. Delete the install.aspx, install.aspx.cs, installwizard.aspx and installwizard.aspx.cs files if they still remain, as they could pose a potential security risk.

Post-Upgrade Considerations:

Once you are satisfied with the upgraded test site, it is time to determine how to get the production site upgraded. There are a couple options available.

1. Make notes and descriptions of all steps taken to get the test site upgraded from start to finish. Then perform the exact same steps on the production site. A few considerations to be made for this approach:
 - a. This method can be the best if there are new users, added content or other changes made since the time that the test upgrade snapshot was taken.
 - b. Live traffic can interfere with the upgrade, so you may wish to make a static dummy site in IIS using the external domain, to display simple HTML file to users while you access the real site using an IP address or other private URL.
 - c. The upgrade on the live site may for some reason be different than the test site, so you may encounter errors that were not seen during testing. In this case taking screenshots and saving the logs is still very important, before restoring the backup files and database.
2. Another method of deployment is to simply use the upgraded test site as your new live site. This can be accomplished by either pointing the live URL to the new location, or by copying the files and database over the existing site.
 - a. This method is preferred if there have not been many changes made to the site since the upgrade testing began.
 - b. This method can be the least amount of work, since you do not need to perform the whole upgrade process again.
 - c. There can be issues with moving the site, related to permissions or environment. If any problems are encountered, contact the Evoq Support Team or your hosting provider immediately.