

CASE MANAGER 5.2 UPGRADE GUIDE

TECHNICAL MANUAL - UP TO VERSION 5.2.1

Overview

This document describes technical details of upgrading to version 5.2. Coming from version 5.1 there are a number of fundamental changes that require understanding from the supporting ships, and additional processes to take into account that cannot be performed by the automatic upgrade process.

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Versions

Upgrading to 5.2.0

Version changes

1. Instance Directory
 - a. It is now possible to bypass the Instance Directory discovery by specifying the address of the Instance Directory explicitly in the registry. This is necessary for environments where broadcast-based discovery is not allowed.
2. Instance Directory Utility
 - a. The logging to screen of the Backup/Restore process is now optional. Disabling this will allow much faster process speed.
 - b. The selected instance is now more clearly indicated
 - c. If the discovery is bypassed, the utility will still be able to configure the Instance Directory.
3. Brand changed to Case Manager. References to VoyagerNetz and ArmadaNetz have been removed.

Notes for upgrading

The brand change effects the most significant impact during the upgrade. The folder structure, the published ClickOnce names, and the server application names were all affected by this change.

1. Uninstall the Time- and Queue services before upgrading to 5.2. This will correctly identify the services starting with “Vn”. In 5.2, these services will be installed with names starting with “Cm”. Removing these services after the upgrade will be more difficult.
2. On existing sites, coming from 5.1, all the content from the VoyagerNetz folders should be copied to the relevant CaseManager folders.
 - a. All file shares should be set up again
 - b. All scheduled task should be redone
 - c. All in-application references to folders (Attachments, Report) should be corrected.
 - d. All database connection strings in integrations should be updated.
 - e. All workstations must be uninstalled and reinstalled as “Case Manager” (no longer “VoyagerNetz”) applications.

Upgrading to 5.2.1

Version changes

1. Configuration Tools
 - a. User management is now available in the Configuration Tools.
 - b. Document Template management supports new in-database format*
 - c. Report Template management supports new in-database format*
 - d. Optimised for better memory usage
2. Printing
 - a. Report and Document printing supports new in-database format*
 - b. PrintGroup will now associate the correct print date
3. Attachments
 - a. The Attachment functionality is removed from Case Manager and is available as an extension
4. Payment Allocations
 - a. Improved payment allocation logic is now standard in Case Manager
5. Refactoring
 - a. Many legacy structures are removed from the database in this version.

*Report and Document Templates

[Read more about the new template functionality:](#)

Attachments

The attachment action in the Case Manager will no longer be available by default. An extension (Attachment File Share - ATTFS) is available to add the action to Case Manager again. I've added this to the extensions folder in the 5.2.1 version.

The setup for the attachment path will no longer be in the Case Manager Settings in the Configuration Tool, but will be configurable in the Extension Settings. On upgrade, the extension's path is automatically set up as the original value.

Note that, for this reason, a new form customisation needs to be loaded in the Configuration Tools for the Case Manager Settings to remove the attachment path settings. You should also ensure that the toolbar customisation of the client shows the new (extension) attachment action if the functionality is used.

Legacy database structures

The following legacy structures have been removed from the Case Manager database. Please ensure no integration makes use of any of these structures.

- Views
 - The LIST_ views
 - The EDIT_ views
 - The SSP HANDOVER WITHDRAW views
 - ARCHIVED2
 - CASEHISTORY_RUNNINGTOTAL
 - LEGACY_TEAMMEMBER
 - The DUPLICATE_ views
 - The LASTHISTORY views
- Tables
 - The BUF_ tables
 - The CONSULTANT tables
 - CASETAGS
 - COUNTER
 - CUMIN_ACTIVITY_TYPE
 - DIARY
 - GLOBALPARM_COST
 - GLOBALPARM_FIELDSERACH
 - GLOBALTAG
 - GLOBALTAGDEF
 - PORTAL_LOG
 - SESSIONS
 - SETTINGSINCIDENT
 - SETTINGSUSER
 - STARGATEGROUP
 - USERWORKGROUPS

- VOYAGERRULES
- VPARAMETERS
- WAREHOUSE1
- Procedures
 - GETTIMESTAMP

Notes for upgrading

1. Install the ATTFS extension
2. Set the form customisation of Case Manager Settings to the file in CaseManagerTools
3. Revisit client's toolbar customisation: if applicable, ensure that the new Attachment action is available to all users.
4. Consider the recommended changes mentioned in [☰ Case Manager 5.2: Templates](#)
5. Test all custom extensions and integrations with regards to the removal of the legacy structures.