



Perspective™

by PPM

UPDATE GUIDE

V4.0 OR OLDER TO V4.6



Technical Support Knowledge Base

Perspective Version 1.0 to Version 4.0: Upgrade to Version 4.6

If upgrading from the following versions, these are the update instructions to follow:

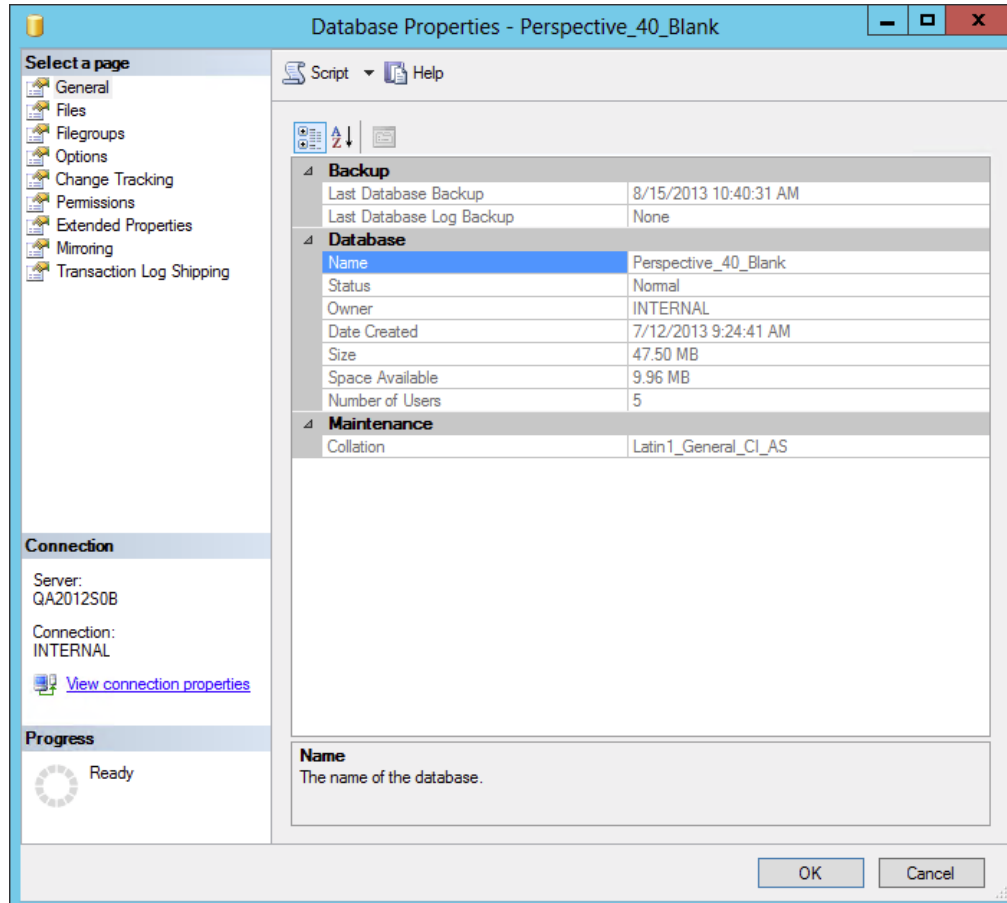
- Version 1.0
- Version 1.1.1
- Version 1.1.2
- Version 1.2
- Version 1.3
- Version 1.3.1
- Version 2.0
- Version 2.1.1
- Version 2.5
- Version 3.0
- Version 3.1
- Version 3.2
- Version 3.3

If upgrading from 4.5, please refer to the Perspective Update Instructions 4.6 document.

Update Instructions

1. Back up your Perspective SQL database.
2. Back up the **Perspective_Default.config** file in the Perspective Services Virtual Directory. This file contains all necessary information on how your system was configured.
3. Ensure that your database is already upgraded to **Perspective v.4.0**.
4. In the **Compatibility Settings** of your SQL database, ensure your database is in compatibility mode for SQL 2008.

If it is not, open the **Microsoft SQL Management Studio**, expand **Databases**, right-click your Perspective database and select **Properties**. On the left-hand column, select **Options**. In the **Compatibility level** field, select **SQL Server 2008 (100)**.



5. If your database has not already been updated to version 4.0, please contact [Technical Support](#) for assistance in updating older versions. Legacy update scripts are provided in the previous updates folder with this installation.

Note: Do not proceed unless you have updated your Perspective database to Version 4.0.

For more information on running the installs, refer to the *Perspective Installation Guide*.

6. Uninstall **Perspective Services** through the Windows **Control Panel**. In Windows 7 and Windows 8, this is found in **Programs and Features**; older versions use **Add/Remove Programs**.

Note: If updating from version 2.1 or earlier, you will need to have already uninstalled the Perspective client from each client machine.

7. If installed, uninstall any earlier versions of **Perspective Integration Services** and **Service Manager**.

To move to 4.6 from	Open folder	Run update packages and SQL scripts
Version 1.0	<i>1_Update_10_To_111</i>	<ul style="list-style-type: none"> a. Version_1_0_to_1_1_1.exe b. Perspective_v1_Update.sql c. Drop_Functions_1_1.exe d. Create_Functions_1_1.exe
	<i>2_Update_111_To_112</i>	<ul style="list-style-type: none"> e. Perspective112_Update.exe f. SQLPackage_112_Sample_Update.exe
	<i>3_Update_112_To_12</i>	<ul style="list-style-type: none"> g. SQLPackage_Update_112_To_12.exe h. SQL_Script_Post_Update_112_To_12.sql
	<i>4_Update_12_To_13</i>	<ul style="list-style-type: none"> i. SQLPackage_Update_12_To_13.exe
	<i>5_Update_13_To_20</i>	<ul style="list-style-type: none"> j. SQLScript_Update_13_To_20.sql
	<i>6_Update_20_To_21</i>	<ul style="list-style-type: none"> k. SQLScript_Update_20_To_21.sql
	<i>7_Update_21_To_25</i>	<ul style="list-style-type: none"> l. SQLScript_Update_21_To_25.sql
	<i>8_Update_25_To_30</i>	<ul style="list-style-type: none"> m. SQLScript_Update_25_To_302.sql
	<i>9_Update_30_To_31</i>	<ul style="list-style-type: none"> n. SQLScript_Update_30_To_31.sql
	<i>10_Update_31_To_32</i>	<ul style="list-style-type: none"> o. SQLScript_Update_31_To_32_part1.sql p. SQLScript_Update_31_To_32_part2.sql q. SQLScript_Update_31_To_32_part3a.sql r. SQLScript_Update_31_To_32_part3b.sql s. SQLScript_Update_31_To_32_part3c.sql t. SQLScript_Update_31_To_32_part3d.sql u. SQLScript_Update_31_To_32_part3e.sql v. SQLScript_Update_31_To_32_part3f.sql w. SQLScript_Update_31_To_32_part3g.sql x. SQLScript_Update_31_To_32_part4.sql

To move to 4.6 from	Open folder	Run update packages and SQL scripts
	11_Update_32_To_33	y. SQLScript_Update_32_To_33.sql
	12_Update_33_to_40_to_402	z. SQLScript_Update_33_To_40.sql aa. SQLScript_Update_40_To_402.sql
Version 1.1	2_Update_111_To_112	a. Perspective112_Update.exe
	3_Update_112_To_12	b. SQLPackage_Update_112_To_12.exe c. SQL_Script_Post_Update_112_To_12.sql
	4_Update_12_To_13	d. SQLPackage_Update_12_To_13.exe
	5_Update_13_To_20	e. SQLScript_Update_13_To_20.sql SQLScript_Update_20_To_21.sql
	6_Update_20_To_21	f. SQLScript_Update_21_To_25.sql
	7_Update_21_To_25	g. SQLScript_Update_25_To_302.sql
	8_Update_25_To_30	h. SQLScript_Update_30_To_31.sql
	9_Update_30_To_31	i. SQLScript_Update_31_To_32_part1.sql j. SQLScript_Update_31_To_32_part2.sql k. SQLScript_Update_31_To_32_part3a.sql l. SQLScript_Update_31_To_32_part3b.sql m. SQLScript_Update_31_To_32_part3c.sql n. SQLScript_Update_31_To_32_part3d.sql o. SQLScript_Update_31_To_32_part3e.sql p. SQLScript_Update_31_To_32_part3f.sql q. SQLScript_Update_31_To_32_part3g.sql r. SQLScript_Update_31_To_32_part4.sql
	10_Update_31_To_32	s. SQLScript_Update_32_To_33.sql

To move to 4.6 from	Open folder	Run update packages and SQL scripts
Version 1.1.2 Production	11_Update_32_To_33	t. SQLScript_Update_33_To_40.sql u. SQLScript_Update_40_To_402.sql
	4_Update_12_To_13	a. SQLPackage_Update_12_To_13.exe
	5_Update_13_To_20	b. SQLScript_Update_13_To_20.sql
	6_Update_20_To_21	c. SQLScript_Update_20_To_21.sql
	7_Update_21_To_25	d. SQLScript_Update_21_To_25.sql
	8_Update_25_To_30	e. SQLScript_Update_25_To_302.sql
	9_Update_30_To_31	f. SQLScript_Update_30_To_31.sql
	10_Update_31_To_32	g. SQLScript_Update_31_To_32_part1.sql h. SQLScript_Update_31_To_32_part2.sql i. SQLScript_Update_31_To_32_part3a.sql j. SQLScript_Update_31_To_32_part3b.sql k. SQLScript_Update_31_To_32_part3c.sql l. SQLScript_Update_31_To_32_part3d.sql m. SQLScript_Update_31_To_32_part3e.sql n. SQLScript_Update_31_To_32_part3f.sql o. SQLScript_Update_31_To_32_part3g.sql p. SQLScript_Update_31_To_32_part4.sql
	11_Update_32_To_33	q. SQLScript_Update_32_To_33.sql
	12_Update_33_to_40_t o_402	r. SQLScript_Update_33_To_40.sql s. SQLScript_Update_40_To_402.sql
Version 1.2	4_Update_12_To_13	a. SQLPackage_Update_12_To_13.exe
	5_Update_13_To_20	b. SQLScript_Update_13_To_20.sql

To move to 4.6 from	Open folder	Run update packages and SQL scripts
	<i>6_Update_20_To_21</i>	c. SQLScript_Update_20_To_21.sql
	<i>7_Update_21_To_25</i>	d. SQLScript_Update_21_To_25.sql
	<i>8_Update_25_To_30</i>	e. SQLScript_Update_25_To_302.sql
	<i>9_Update_30_To_31</i>	f. SQLScript_Update_30_To_31.sql
	<i>10_Update_31_To_32</i>	g. SQLScript_Update_31_To_32_part1.sql h. SQLScript_Update_31_To_32_part2.sql i. SQLScript_Update_31_To_32_part3a.sql j. SQLScript_Update_31_To_32_part3b.sql k. SQLScript_Update_31_To_32_part3c.sql l. SQLScript_Update_31_To_32_part3d.sql m. SQLScript_Update_31_To_32_part3e.sql n. SQLScript_Update_31_To_32_part3f.sql o. SQLScript_Update_31_To_32_part3g.sql p. SQLScript_Update_31_To_32_part4.sql
	<i>11_Update_32_To_33</i>	q. SQLScript_Update_32_To_33.sql
	<i>12_Update_33_to_40_t o_402</i>	r. SQLScript_Update_33_To_40.sql s. SQLScript_Update_40_To_402.sql
Version 1.3 or 1.3.1	<i>5_Update_13_To_20</i>	a. SQLScript_Update_13_To_20.sql
	<i>6_Update_20_To_21</i>	b. SQLScript_Update_20_To_21.sql
	<i>7_Update_21_To_25</i>	c. SQLScript_Update_21_To_25.sql
	<i>8_Update_25_To_30</i>	d. SQLScript_Update_25_To_302.sql
	<i>9_Update_30_To_31</i>	e. SQLScript_Update_30_To_31.sql
	<i>10_Update_31_To_32</i>	f. SQLScript_Update_31_To_32_part1.sql

To move to 4.6 from	Open folder	Run update packages and SQL scripts
		<ul style="list-style-type: none"> g. SQLScript_Update_31_To_32_part2.sql h. SQLScript_Update_31_To_32_part3a.sql i. SQLScript_Update_31_To_32_part3b.sql j. SQLScript_Update_31_To_32_part3c.sql k. SQLScript_Update_31_To_32_part3d.sql l. SQLScript_Update_31_To_32_part3e.sql m. SQLScript_Update_31_To_32_part3f.sql n. SQLScript_Update_31_To_32_part3g.sql o. SQLScript_Update_31_To_32_part4.sql
	<i>11_Update_32_To_33</i>	<ul style="list-style-type: none"> p. SQLScript_Update_32_To_33.sql
	<i>12_Update_33_to_40_to_402</i>	<ul style="list-style-type: none"> q. SQLScript_Update_33_To_40.sql r. SQLScript_Update_40_To_402.sql
Version 2.0 or 2.0.1	<i>6_Update_20_To_21</i>	<ul style="list-style-type: none"> a. SQLScript_Update_20_To_21.sql
	<i>7_Update_21_To_25</i>	<ul style="list-style-type: none"> b. SQLScript_Update_21_To_25.sql
	<i>8_Update_25_To_30</i>	<ul style="list-style-type: none"> c. SQLScript_Update_25_To_302.sql
	<i>9_Update_30_To_31</i>	<ul style="list-style-type: none"> d. SQLScript_Update_30_To_31.sql
	<i>10_Update_31_To_32</i>	<ul style="list-style-type: none"> e. SQLScript_Update_31_To_32_part1.sql f. SQLScript_Update_31_To_32_part2.sql g. SQLScript_Update_31_To_32_part3a.sql h. SQLScript_Update_31_To_32_part3b.sql i. SQLScript_Update_31_To_32_part3c.sql j. SQLScript_Update_31_To_32_part3d.sql k. SQLScript_Update_31_To_32_part3e.sql l. SQLScript_Update_31_To_32_part3f.sql m. SQLScript_Update_31_To_32_part3g.sql

To move to 4.6 from	Open folder	Run update packages and SQL scripts
		n. SQLScript_Update_31_To_32_part4.sql
	11_Update_32_To_33	o. SQLScript_Update_32_To_33.sql
	12_Update_33_to_40_t o_402	p. SQLScript_Update_33_To_40.sql q. SQLScript_Update_40_To_402.sql
Version 2.1 or 2.1.1	7_Update_21_To_25	b. SQLScript_Update_21_To_25.sql
	8_Update_25_To_30	b. SQLScript_Update_25_To_302.sql
	9_Update_30_To_31	c. SQLScript_Update_30_To_31.sql
	10_Update_31_To_32	d. SQLScript_Update_31_To_32_part1.sql e. SQLScript_Update_31_To_32_part2.sql f. SQLScript_Update_31_To_32_part3a.sql g. SQLScript_Update_31_To_32_part3b.sql h. SQLScript_Update_31_To_32_part3c.sql i. SQLScript_Update_31_To_32_part3d.sql j. SQLScript_Update_31_To_32_part3e.sql k. SQLScript_Update_31_To_32_part3f.sql l. SQLScript_Update_31_To_32_part3g.sql m. SQLScript_Update_31_To_32_part4.sql
	11_Update_32_To_33	n. SQLScript_Update_32_To_33.sql
	12_Update_33_to_40_t o_402	o. SQLScript_Update_33_To_40.sql p. SQLScript_Update_40_To_402.sql
Version 2.5	8_Update_25_To_30	a. SQLScript_Update_25_To_302.sql
	9_Update_30_To_31	b. SQLScript_Update_30_To_31.sql
	10_Update_31_To_32	c. SQLScript_Update_31_To_32_part1.sql

To move to 4.6 from	Open folder	Run update packages and SQL scripts
		<ul style="list-style-type: none"> d. SQLScript_Update_31_To_32_part2.sql e. SQLScript_Update_31_To_32_part3a.sql f. SQLScript_Update_31_To_32_part3b.sql g. SQLScript_Update_31_To_32_part3c.sql h. SQLScript_Update_31_To_32_part3d.sql i. SQLScript_Update_31_To_32_part3e.sql j. SQLScript_Update_31_To_32_part3f.sql k. SQLScript_Update_31_To_32_part3g.sql l. SQLScript_Update_31_To_32_part4.sql
	<i>11_Update_32_To_33</i>	m. SQLScript_Update_32_To_33.sql
	<i>12_Update_33_to_40_to_402</i>	<ul style="list-style-type: none"> n. SQLScript_Update_33_To_40.sql o. SQLScript_Update_40_To_402.sql
Version 3.0	<i>9_Update_30_To_31</i>	a. SQLScript_Update_30_To_31.sql
	<i>10_Update_31_To_32</i>	<ul style="list-style-type: none"> b. SQLScript_Update_31_To_32_part1.sql c. SQLScript_Update_31_To_32_part2.sql d. SQLScript_Update_31_To_32_part3a.sql e. SQLScript_Update_31_To_32_part3b.sql f. SQLScript_Update_31_To_32_part3c.sql g. SQLScript_Update_31_To_32_part3d.sql h. SQLScript_Update_31_To_32_part3e.sql i. SQLScript_Update_31_To_32_part3f.sql j. SQLScript_Update_31_To_32_part3g.sql k. SQLScript_Update_31_To_32_part4.sql
	<i>11_Update_32_To_33</i>	l. SQLScript_Update_32_To_33.sql
	<i>12_Update_33_to_40_to_402</i>	<ul style="list-style-type: none"> m. SQLScript_Update_33_To_40.sql n. SQLScript_Update_40_To_402.sql

To move to 4.6 from	Open folder	Run update packages and SQL scripts
Version 3.1	10_Update_31_To_32	<ul style="list-style-type: none"> a. SQLScript_Update_31_To_32_part1.sql b. SQLScript_Update_31_To_32_part2.sql c. SQLScript_Update_31_To_32_part3a.sql d. SQLScript_Update_31_To_32_part3b.sql e. SQLScript_Update_31_To_32_part3c.sql f. SQLScript_Update_31_To_32_part3d.sql g. SQLScript_Update_31_To_32_part3e.sql h. SQLScript_Update_31_To_32_part3f.sql i. SQLScript_Update_31_To_32_part3g.sql j. SQLScript_Update_31_To_32_part4.sql
	11_Update_32_To_33	<ul style="list-style-type: none"> k. SQLScript_Update_32_To_33.sql
	12_Update_33_to_40_t o_402	<ul style="list-style-type: none"> l. SQLScript_Update_33_To_40.sql m. SQLScript_Update_40_To_402.sql
Version 3.2	11_Update_32_To_33	<ul style="list-style-type: none"> a. SQLScript_Update_32_To_33.sql
	12_Update_33_to_40_t o_402	<ul style="list-style-type: none"> b. SQLScript_Update_33_To_40.sql c. SQLScript_Update_40_To_402.sql
Version 3.3	12_Update_33_to_40_t o_402	<ul style="list-style-type: none"> a. SQLScript_Update_33_To_40.sql b. SQLScript_Update_40_To_402.sql

Note: If updating from version 2.1 or earlier, you will need to have already uninstalled the Perspective client from each client machine.

8. If installed, uninstall any earlier versions of **Perspective Integration Services** and **Service Manager**.
9. Update the Perspective database using the **Perspective Install > Database Setup > Update** folder. Using a SQL query tool (e.g., SQL Server Management Studio), execute update scripts against the Perspective database.
 - a. Run SQLScript_Update_402_To_45.sql.
 - b. Run SQLScript_Update_45_To_46.sql.

- c. **Optional:** We have an SQL Script that can be run that checks to see if a Child Value (Building, Location, or Section) has a Latitude and Longitude, and if it is empty, it will match to the parent value. In the instance where all of the items in the tier are in the same location and you would be comfortable with this being implemented for mapping purposes, you can set up just the Site, and then use this to populate the lower tiers. If you are a Hosted client, please make this request via our Support team once you have all of your Site Rollups updated. The script name is: BackFill_SiteRollups.sql
 - d. **Optional:** We have an SQL Script that can be run that populates the Geo Co-ordinates of all Activities and Incidents if they have a SiteRollup associated to it. This will only be run against Activities and Incidents where the Geo Co-ordinates aren't already set. The script name is: Update_Inc_Act_Site_Geos.sql
10. Repeat step 8 for each Perspective database you are running (e.g., test, production, archive).
 11. Update reports using the **Perspective Install > Reports Setup** folder (please refer to Perspective Installation Guide for more detailed outline of SQL reports setup):
 - a. Edit the **PublishServerReports.bat** file to target the SQL Reporting Services server.
 - b. Save and execute the file.

Note: If you are using Windows® authentication, additional configuration of the Reports data source may be required.

For more information on running the installs, refer to the Perspective Installation Guide.

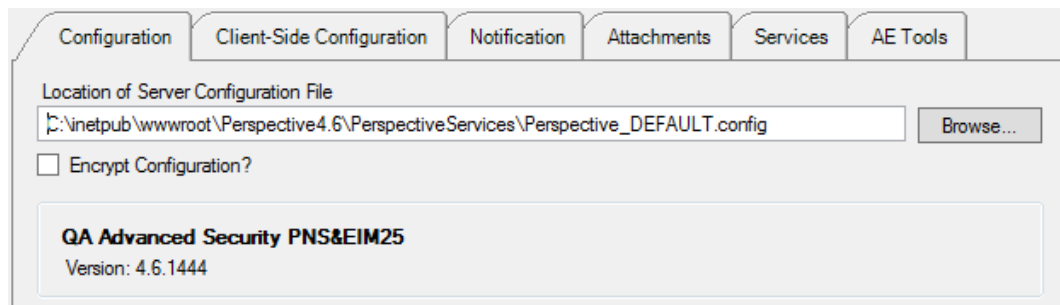
12. Uninstall **Perspective Services** through the Windows **Control Panel**. In Windows 7 and Windows 8, this is found in **Programs and Features**; older versions use **Add/Remove Programs**.
- Note: If updating from version 2.1 or earlier, you will need to have already uninstalled the Perspective client from each client machine.*
13. If installed, uninstall any earlier versions of **Perspective Integration Services** and **Service Manager**. **Check your Perspective directory and IIS for any remnants of your previous Perspective Services installation. Remove any remaining files or folders.**
 14. Install Perspective Services 4.6 using the **Perspective Install > Web Service Setup > Perspective Services** folder. Run (as an administrator) **Perspective.Services.exe** to install the updated Perspective Services.

If this is your first time working with Perspective Services, please read through the *Perspective Installation Guide*.

If you have the SOC or EIM edition—which includes the Dispatching component—and are doing the Custom Install, ensure that Real Time Services is installed. Refer to the Installation Guide for configuration details.

Note: Perspective Services may prompt you for the installation of C++ runtime libraries. Please refer to the Standard Install > Perspective Services (Application Web Server) section of the Perspective Installation Guide for more information.

15. Install Perspective Service Manager (see the *Perspective Installation Guide* for details).
16. Configure connections using Perspective Service Manager:
 - a. To access Perspective Service Manager, go to C:\Program Files\PPM 2000 Inc\Perspective\4.6\ServiceManager, and open Perspective.ServerManager, or open it from the desktop, launch (as an Administrator) **Perspective 4.6 Service Manager**. You will be asked to provide the Database Connection information. Refer to the *Perspective Installation Guide* if needed.
 - b. Under the **Configuration** tab, verify the location specified in the **Location of Server Configuration File** field. The field should be automatically populated with the default location of the **Perspective_Default.config** file in the **Perspective Services Virtual Directory**. If necessary, use the **Browse** button to point to the correct location.



- c. Under the **Database** tab, enter the primary database information. This information can be copied from within the **Perspective_Default.config** backup file. Add secondary databases, if required.
 - d. Under the **Product Validation** tab, enter your **Hard Coded Company Name** and **Master Key**, and click **Validate**.

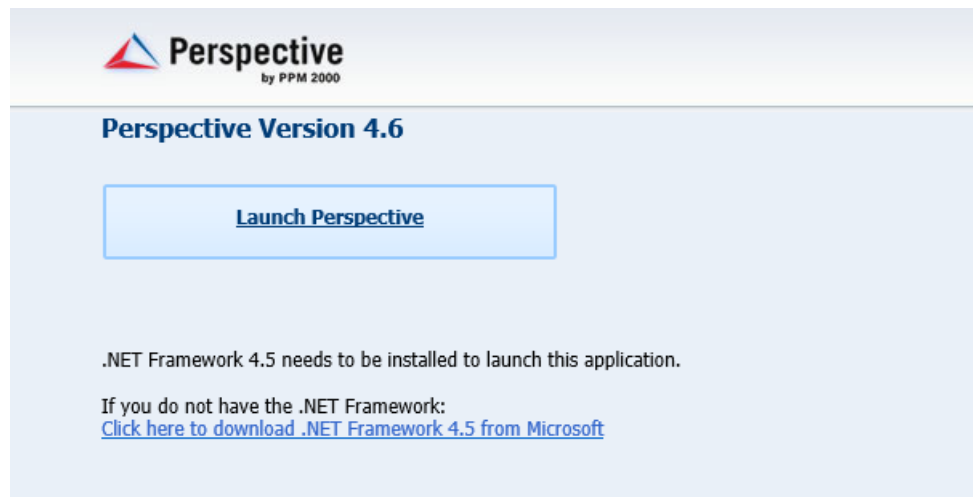
Note: This step requires an Internet connection to download your encrypted license file from PPM 2000's licensing server. If your webserver cannot access the Internet please contact Technical Support for a License file for validation.

- e. In the **Client-Side Configuration** sub-tab, enter the **Server URL** for the client folder if the field is empty.
 - f. Verify the **Notification** and **Attachments** settings, and make any required changes.
 - g. Verify the **Quick Find Indexing** and **Services** settings, and make any required changes.
 - h. Click **Save Changes**, then click **Yes** when prompted for confirmation.

- i. Close Perspective Service Manager and restart IIS.

For detailed instructions on using the Perspective Service Manager, please read through the *Perspective Installation Guide*.

17. Launch the Perspective Version 4.6 client from the host Perspective Services default web page (e.g., <http://IISServer/PerspectiveServices>) on each client machine. Your default web page should look like the screenshot below. Refer to the *Perspective Installation Guide* for more information.



- 18.

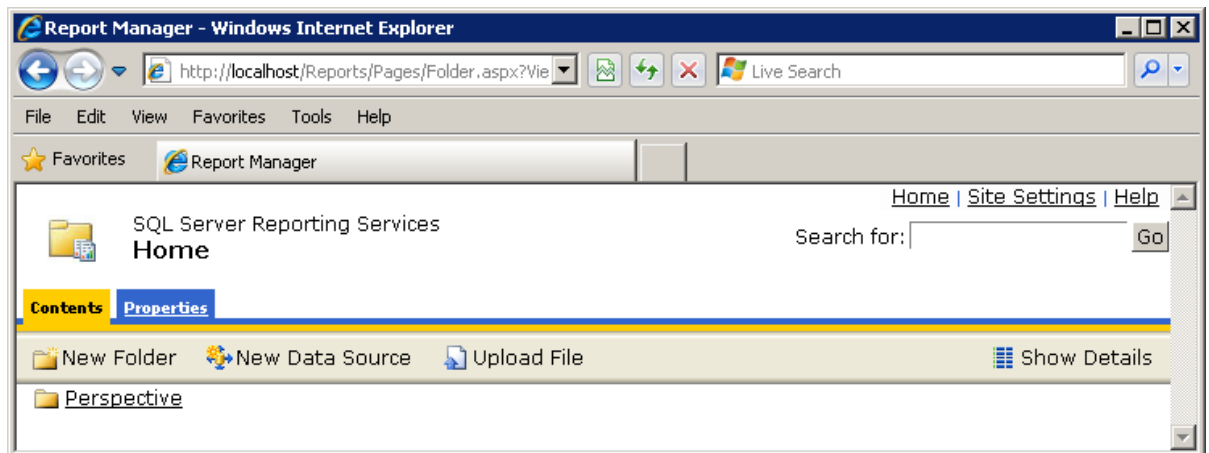
Note: If installing clients using the MSI package, ensure that previously installed Perspective applications on client machines have been uninstalled first. To install Perspective on client machines using the MSI package, please refer to the Perspective Installation Guide.

Testing Perspective Implementation

Once you have completed the steps outlined in the previous section, please go through the following steps to ensure that all of Perspective's components have been set up properly.

1. Go to the Perspective Services URL and confirm that the page loads properly:
<http://<localhost>/perspectiveservices>.
2. Go to the Perspective Services page and confirm that the page loads properly:
<http://<localhost>/perspectiveservices/service.aspx>.
3. Go to the Reports page and confirm that the page loads properly:
<http://<reportservername>/reports>.

*Note: If your Reports page does not display correctly, run the **PublishServerReports.bat** file included in the **Perspective Install > Reports Setup** folder.*



4. Logon to the Perspective client—preferably not on the server itself—using your Perspective Administrator user name and password.
5. Once you have logged on successfully, click on the **Reports** button in the **Navigation** pane (on the left-hand side of the screen) and confirm that all reports are listed. The easiest way to confirm that the client-side reports are working is to verify that there are reports listed under the **Detail Reports** heading (e.g., incident, person and vehicle reports).
6. To confirm that server-side reports are working, select **Test Report** and click **Preview**. If you receive an error message, please call the Technical Support team at 1-877-776-2995 for assistance.

Note: The Report version should display as 4.6, while the Database version should display as 4.6.0.

7. To confirm that you are connected to the correct database, run the **Workgroup List** report and verify the workgroups listed.