



**Perspective**<sup>™</sup>

by PPM

# UPDATE INSTRUCTIONS

Perspective by PPM™

Version 4.0

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# System Requirements

## Version 4.0

The following requirements are for Perspective™ operating in a traditional LAN/WAN environment with the Web server component running on a separate Microsoft® IIS box. These configurations are for planning purposes only—please work with your PPM account manager for a specific assessment of your needs. These requirements apply to Perspective™ V.4.0 and Perspective Focal Point™ V.1.2.

	Minimum	Recommended
<b>Client Machine</b>		
<b>Processor Speed</b>	1.5 GHz	3 GHz+
<b>Memory</b>	1 GB	2 GB+
<b>Operating System</b>	Windows® Vista SP 3, Windows® 7 SP 1, Windows® 8	
<b>.NET Framework</b>	Version 4.0	
<b>Web Browser – Launch Perspective</b>	Internet Explorer® 7.0, Internet Explorer® 8.0, Internet Explorer® 9.0, Internet Explorer® 10.0	
<b>Web Browser – Web Portal</b>	Internet Explorer® 10.0, Chrome v29+, Safari iOS5.1+, Android Browser 4.2+	
<b>Third Party Application</b>	Adobe® Reader® 9.4.0+ Microsoft Office® 2007 <sup>1</sup> , Microsoft Office® 2010 <sup>1</sup> Sun Java™ Runtime Environment 7 U15+ <sup>2</sup> QlikView™ Analyzer Plug-in for Internet Explorer® <sup>3</sup>	
<b>Mobile iOS App</b>	iOS 5, iOS 6, iOS 7	
<b>Web Services Server<sup>4</sup></b>		
<b>Available Disk Space<sup>5</sup></b>	1 GB	1 GB
<b>Processor Speed</b>	2 GHz	2 GHz multicore or better
<b>Memory</b>	4 GB	8 GB+
<b>Operating System</b>	Windows Server® 2008 SP 2 64 bit with IIS, Windows Server® 2008 R2 SP 1 64 bit with IIS, Windows Server® 2012 with IIS	
<b>.NET Framework</b>	Version 4.5 with http and non-http activation	
<b>C++ Runtime Libraries</b>	C++ 2010 SP1 Runtime Libraries (x64) 10.40219	
<b>QlikView™ Server<sup>6</sup></b>	64 bit Version 11.20 SR1	
<b>SQL Server® Machine<sup>4</sup></b>		
<b>Available Disk Space</b>	2 GB	20 GB+, SCSI Hard Drive
<b>Processor Speed</b>	3 GHz	64 bit Server Dual Core or Multiple Processors
<b>Memory</b>	2 GB	4 GB+
<b>Database Server<sup>10</sup></b>	SQL Server® 2008 Standard SP 1 or R2, SQL Server® 2012 Standard or Enterprise	
<b>Reporting Services</b>	SQL Server® 2008 Reporting Services, SQL Server® 2012 Reporting Services	

**Deployment Note:** Perspective client is deployed as a ClickOnce application, launched from Internet Explorer®; it has a zero client footprint and does not require administrative rights to launch. Refer to last page for more details on ClickOnce.

**Network Note:** If single sign-on authentication or add from Active Directory® is used, the Active Directory® Services must be enabled on the Perspective Web Server.

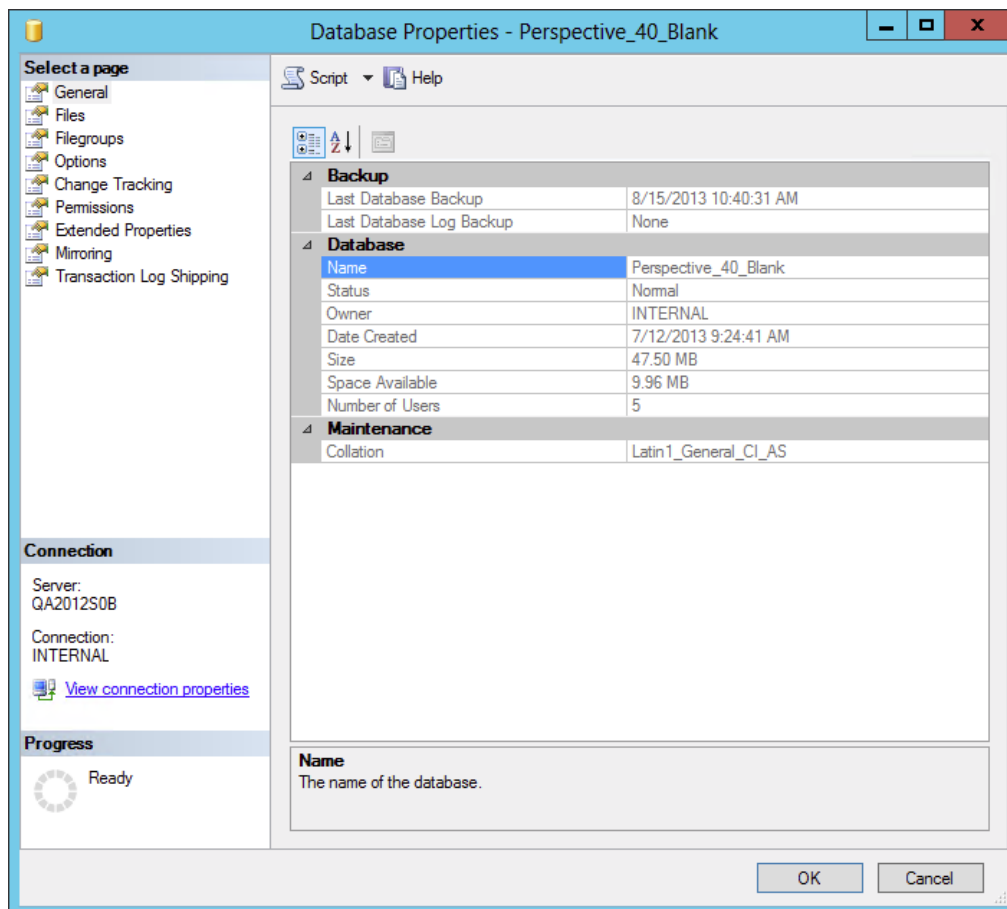
**DTC Note:** Perspective Integration Services requires the Microsoft® Distributed Transaction Coordinator (DTC) service to be installed and enabled on the Internet Information Services (IIS) for Windows® Web Server and the Microsoft® SQL Server® for Perspective.

1. This requirement only applies if using Outlook® email integration.
2. This requirement only applies if using the Visual Analysis component.
3. This requirement only applies to Perspective Focal Point.
4. These requirements are for systems with 5 to 25 users. For Perspective systems with more than 25 users, please contact your PPM Account Manager for a specific assessment of your needs.
5. Depending on the size of your Perspective database, more disk space may be required for Perspective Focal Point and the Workflow component.
6. This requirement only applies to Perspective Focal Point. A limited QlikView™ Server license is included with Focal Point.

# 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.3.3**.
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 3.3, 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 3.3.*

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**.
8. 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.

You must run scripts one at a time to update your Perspective database version, depending on what version you're running. For example, if you are using Perspective 3.0, you will need to run the 3.0 to 3.1 update script, then the 3.1 to 3.2 and 3.2 to 3.3 update scripts, and finally the script to update from 3.3 to 4.0. These scripts are available from PPM.

*Note: Optionally, you can run the included `CheckForInvalidData.sql` script to display corrupt data that will be removed as part of this update. Before upgrading to 4.0, resolve any data issues to avoid data loss.*

The script to update from Version 3.3 to 4.0 is **SQLScript\_Update\_33\_To\_40.sql**.

9. Repeat step 8 for each Perspective database you are running (e.g., test, production).
10. Update reports using the **Perspective Install > Reports Setup** folder:
  - a. Edit the **PublishServerReports.bat** file to target the SQL Reporting Services server.
  - b. Save and execute the file.

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

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

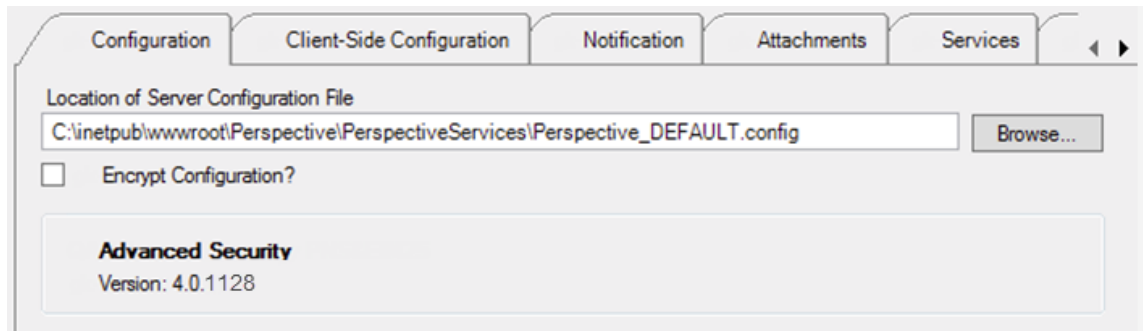
11. Install Perspective Services 4.0 using the **Perspective Install > Web Service Setup > Perspective Services** folder. Run (as an administrator) **Perspective.Services.exe** to install the updated Perspective Services.

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.*

12. Install Perspective Service Manager (see the *Perspective Installation Guide* for details).
13. Configure connections using Perspective Service Manager:
  - a. To access Perspective Service Manager, go to C:\Program Files\PPM 2000 Inc\Perspective\4.0\ServiceManager, and open Perspective.ServerManager, or open it from the desktop, launch (as an Administrator) **Perspective 4.0 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 you do not have Internet connection or have issues communicating with the license server, please contact Technical Support to provide you with a license file in LIC format you can manually use to validate.*

- 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 changes as required.

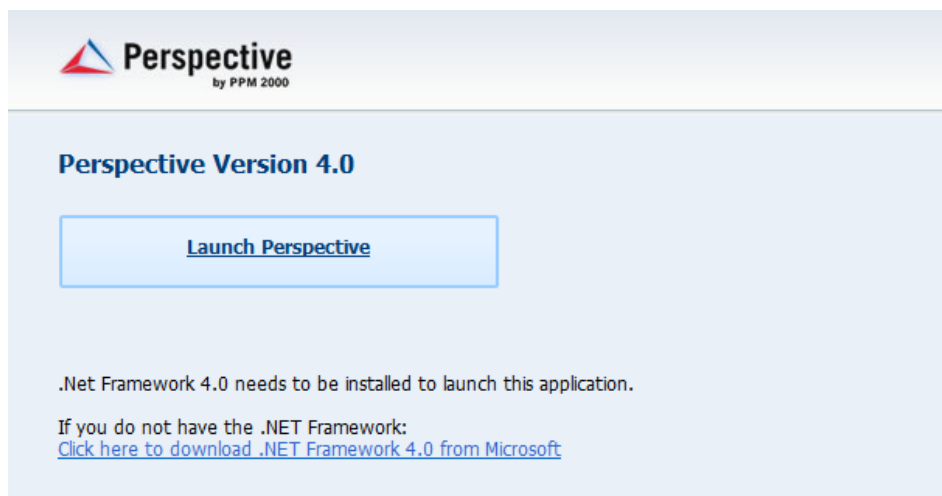
- g. Verify the **Quick Find Indexing** and **Services** settings, and make changes as required.

*Note: If updating from a version earlier than 2.5, you may need to update your Analysis Expert (AE) queries. Please contact Technical Support for assistance.*

- 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*.

- 14. Launch the Perspective Version 4.0 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.



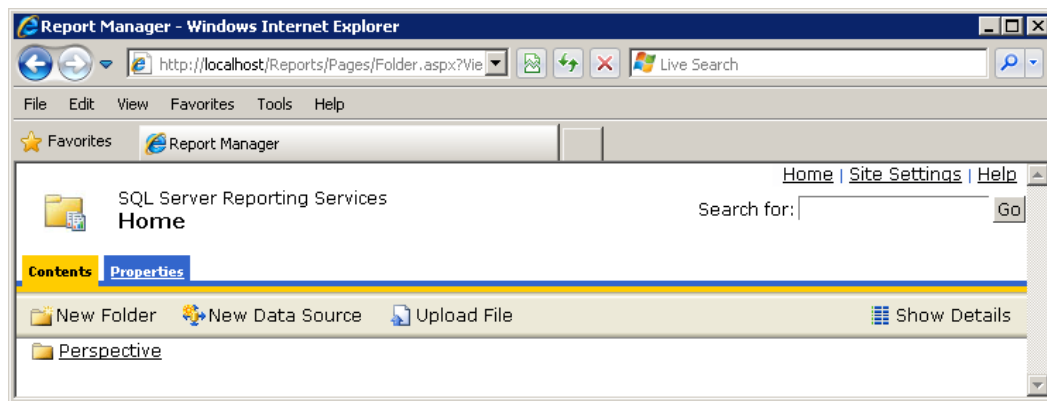
*Note: If installing clients using the MSI package, ensure that previously installed Perspective applications on client machines have been uninstalled first. To install Perspective on client machines using the MSI package, please refer to the Perspective Installation Guide.*



# Testing Perspective Implementation

1. Go to the Perspective Services URL and confirm that the page loads properly:  
**http://<localhost>/perspectiveservices**, where **<localhost>** is the appropriate local host address on your network.
2. Go to the Perspective Services page and confirm that the page loads properly:  
**http://<localhost>/perspectiveservices/service.asmx**, where **<localhost>** is the appropriate local host address on your network.
3. Go to the Report Manager page and confirm that the page loads properly:  
**http://<reportservername>/reports**, where **<reportservername>** is the appropriate address for the reports server on your network.

*Note: If your Report Manager 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, such as the Incident, Person and Vehicle Reports.
6. To confirm that the 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.

*Note: The Report version should display as 4.0, while the Database version should display as 4.0.0.*

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

# Contact Information

## Technical Support

Toll Free: 1-877-776-2995  
Phone: (780) 448-0616  
Email: support@ppm2000.com

## PPM 2000

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