

CardioLog Analytics and SharePoint Marketing Suite Upgrade Procedure Enterprise, Professional, Standard

Version: 2.0.8.3

Date: July 1, 2014

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Upgrade to Version 2.0.8.3

We have released a new version for CardioLog Analytics and the SharePoint Marketing Suite. Find out what's new by viewing our [Release Notes](#).

[Contact us](#) to receive the license codes required for the new version.

The upgrade is free, and our support representatives will be available for online assistance.

Note that Support is given for product versions released over the past 18 months.

Please review the [Intlock Support Policy](#).

If you have customized the Tracking Agent code in your environment, (i.e. customized search) please [contact us](#) before upgrading your product.

If you are upgrading from a version lower than 2.0.3.0, upgrade your product to version 2.0.3.0 first, as detailed [here](#).

Upgrade Procedure

Download links to the software:

[CardioLog Analytics 32-bit](#)

[CardioLog Analytics 64-bit](#)

[SharePoint Marketing Suite 32-bit](#)

[SharePoint Marketing Suite 64-bit](#)

Installation

1. Backup the CardioLog database and the CardioLog Installation Folder ("C:\Program Files\Intlock\CardioLog" by default).
2. Stop the CardioLog Scheduling Service and the CardioLog Diagnostics Service.
3. Uninstall your current version - Start > All Programs > CardioLog/SharePoint Marketing Suite > Uninstall and follow the uninstall wizard steps.
4. Install the new version - double click on the setup file and follow the install wizard steps.
5. After [Activation](#) and [Updating the Tracking Agent](#), start the CardioLog Scheduling Service and CardioLog Diagnostics Service.
6. Perform IISRESET on the CardioLog application server.
7. It is recommended to delete the browser cache for CardioLog users after the upgrade.

Activation

Apply the new version license codes using the [Microsoft License Administrator tool](#).

For online activation (over the internet):

Open [CardioLog Installation Folder]\CardioLogScheduleServices\Microsoft.Licensing.LicAdmin.exe > File > Activation Wizard > Select "I want to activate the software over the internet" and follow the wizard steps.

For manual activation:

Open [CardioLog Installation Folder]\CardioLogScheduleServices\Microsoft.Licensing.LicAdmin.exe > File > Activation Wizard > Select "I want to request a license file" and follow the wizard steps. Send us the request file to receive your permanent license file.

Updating the Tracking Agent

1. Backup the Java Script tracking code.

By default, the Java Script tracking code is embedded within a common Java Script file on your SharePoint WFEs –

For MOSS 2007 only:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\TEMPLATE\LAYOUTS\1033\core.js

For SharePoint 2010 only:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\TEMPLATE\LAYOUTS\1033\init.js

For SharePoint 2013 only:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\TEMPLATE\LAYOUTS\init.js

For MOSS 2007 with "CardioLog Analytics" SharePoint Feature only:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\TEMPLATE\LAYOUTS\CardioLogAgent\CardioLogAgent.js

For SharePoint 2010 with "CardioLog Analytics" SharePoint Feature only:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\TEMPLATE\LAYOUTS\CardioLogAgent\CardioLogAgent.js

For SharePoint 2013 with "CardioLog Analytics" SharePoint Feature only:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\TEMPLATE\LAYOUTS\CardioLogAgent\CardioLogAgent.js

OR

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\TEMPLATE\LAYOUTS\CardioLogAgent\CardioLogAgent.js

The code is located at the end of the file, between these comments: "//Intlock tracking code start", "//Intlock tracking code end".

2. Replace the Java Script tracking code with the one in *CardioLog/SharePoint Marketing Suite > Administration > System Configuration > Usage Tracking Code* (select your SharePoint version).
3. Verify event collection as detailed [here](#).

If you have tracking agents which reside on your SharePoint WFEs (i.e. under "_layouts" when using the "CardioLog Analytics" SharePoint Feature):

1. Edit the tracking code - replace all the occurrences of `http://[server name]:[port]/` (CardioLog server name and port) with `/_layouts/`
2. Backup the CardioLogAgent folder (located under "_layouts" on the SharePoint WFEs).
3. Copy the installation files from [CardioLog Installation Folder]\CardioLogAgent to the existing CardioLogAgent folder, except the web.config file and customized files (if you have customizations in the Tracking Agent code in your environment, i.e. customized search, please [contact us](#) before replacing the files).

4. Edit the following key in the CardioLogAgent\web.config file, located under the <appSettings> section:

```
<add key="CardioLogAgentRoot" value="/_layouts"/>  
<add key="version" value="2.0.8.3"/>
```

5. Add the following keys to the CardioLogAgent\web.config file, located under the <appSettings> section:

```
<add key="UseSPAAuth" value="false"/>  
<add key="FixClaimsUserAccountRegex" value="^(.*[|])(.*)$"/>
```

If your tracking agent is configured to identify authenticated users by retrieving their sign-in user name from SharePoint (as detailed [here](#)):

1. Delete the following key from the CardioLogAgent\web.config, located under the <appSettings> section:

```
<add key="GetUserNameCustom" value=" function GetUsername() {  
  __trace(&quot;GetUsername&quot;); var currentUser = __readCookie(&quot;_userid&quot;);  
  var currentUserId = __readCookie(&quot;spUserId&quot;); if (typeof(_spPageContextInfo) !=  
  &quot;undefined&quot;) { if (!currentUserId || currentUserId != _spPageContextInfo.userId) {  
    currentUser = null; __saveCookie(&quot;spUserId&quot;, _spPageContextInfo.userId, 1000,  
    element.CookieDomain); } } var userInput =
```

```
this.document.getElementById(&quot;userid&quot;); if (useridInput &amp;&amp; useridInput.value  
!= &quot;&quot;) { currentUsername = useridInput.value; } else if (currentUsername == null ||  
currentUsername == &quot;&quot;) { if (typeof (getSPUserAccount) != &quot;undefined&quot;) {  
currentUsername = getSPUserAccount(); } else { currentUsername =  
&quot;Anonymous_&quot;+Math.random()*100000; } } __saveCookie(&quot;_userid&quot;,  
currentUsername, 1000, element.CookieDomain); __trace(&quot;GetUsername return:  
&quot;+currentUsername); return currentUsername; }"/>
```

2. Edit the following key in the CardioLogAgent\web.config, located under the

<appSettings> section:

```
<add key="UseSPAAuth" value="true"/>
```

Upgrade to Version 2.0.3.0

The version prerequisites can be found [here](#).

Upgrade Procedure

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[CardioLog Analytics 64-bit](#)

Installation

1. Backup the CardioLog database and the CardioLog Installation Folder ("C:\Program Files\Intlock\CardioLog" by default).
2. Stop the CardioLog Scheduling Service and the CardioLog Diagnostics Service.
3. **If you are upgrading from a version lower than 1.19.158**, run the *CardioLog_1.19.158.0_Report_Tuning.sql* SQL script against the CardioLog database during off-peak hours - execution time can take up to a few hours, depending on the amount of usage data you have.
4. **If you are upgrading from a version lower than 2.0.2.0**, run the *CardioLog_2.0.2.0_Navigation_Summary_Upgrade.sql* SQL script against the CardioLog database during off-peak hours - execution time can take up to a few hours, depending on the amount of usage data you have (4 minutes per 10 million events, added storage needed - 75MB per 10 million events).
5. Uninstall your current version - Start > All Programs > CardioLog > Uninstall and follow the uninstall wizard steps.
6. Install the new version - double click on the setup file and follow the install wizard steps.
7. **If you are upgrading from a version lower than 1.19.158** and you installed CardioLog on Windows Server 2003 64-bit with IIS 6.0, configure IIS to run in [64-bit mode](#).
8. **If you are upgrading from a version lower than 1.19.158** and you installed CardioLog on Windows Server 2008 64-bit with IIS 7.0, configure the CardioLog application pool to run in 64-bit - Open IIS Manager > Application Pools > Right click the CardioLogApplicationPool and select Advanced Settings > Click "Enable 32-bit Applications" and select "False" > Click OK > Right click the CardioLogApplicationPool and select "Recycle".
9. **If you are upgrading from a version lower than 1.19.158**, verify that you have installed the 158-Compatible license file you have received in order to activate the new (and old) features.

10. If you are using the **"CardioLog Usage Reports" SharePoint feature**, update the Java Script code and replace "reports.html" with "reports.aspx" as detailed [here](#).
11. In order to collect document versioning information (including size and editors) for your SharePoint lists and libraries, add the `docVersion=true` parameter to the "Portal Tree Updates" service as detailed [here](#).