

# Barista Application Framework Upgrade Process

This document outlines the process used to upgrade existing Barista® installations and custom projects with the latest versions of BBj® and Barista. Before starting this process, BASIS recommends you perform a complete backup of the <basis\_home>/barista directory, as well as all project directories associated with Barista.

It is assumed that any custom projects have been created with the [Barista Create Application Utility](#).

The Barista upgrade process itself consists of relatively few steps.

1. Performing a Barista Sync Record Backup
2. Making copies of the necessary files and directories
3. Installing the latest version of Barista
4. Running the Barista Auto Sync Utility

## Barista Sync Record Backup

The Barista Sync File/Record Backup, found in the Barista Utilities menu, creates an xml file version of all records in the Barista administrative files. The xml format is used by the updated Barista installation to restore the specific settings to the new installation, and includes records for users, security roles, sequence numbers, masks, etc. The following tables are included as part of the backup:

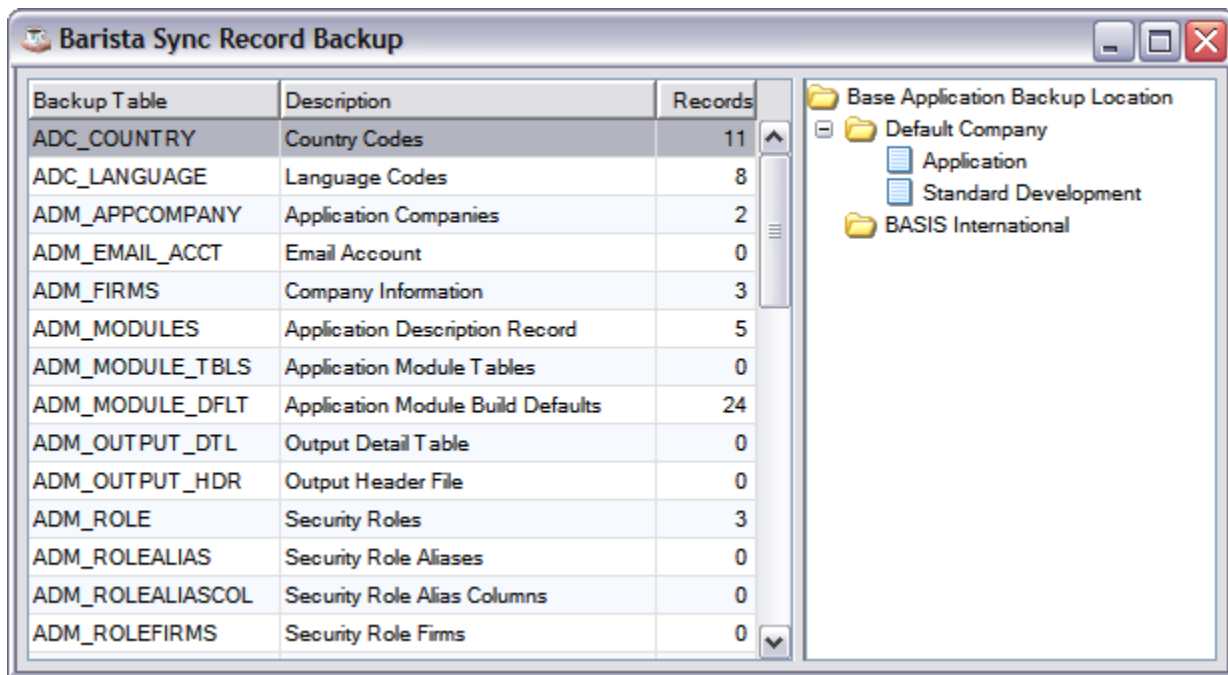
Table ID	Description	Type
ADC_COUNTRY	Country Codes	Barista
ADC_LANGUAGE	Language Codes	Barista
ADM_APPCOMPANY	Application Companies	Barista
ADM_BUS_INST	Update Installation Maintenance	Barista
ADM_EMAIL_ACCT	Email Account	Barista
ADM_FIRMS	Company Information	Barista
ADM_MODULES	Application Description Record	Application
ADM_MODULE_DFLT	Application Module Build Defaults	Application
ADM_MODULE_TBLS	Application Module Tables	Application
ADM_OUTPUT_DTL	Output Detail Table	Barista
ADM_OUTPUT_HDR	Output Header File	Barista
ADM_QUERY	Query Definitions	Application
ADM_QUERY_COLS	Query Column Definitions	Barista
ADM_QUERY_MENU	Query Menus	Barista
ADM_ROLE	Security Roles	Barista

ADM_ROLEALIAS	Security Role Aliases	Barista
ADM_ROLEALIASCOL	Security Role Alias Columns	Barista
ADM_ROLEFIRMS	Security Role Firms	Barista
ADM_SEARCHES	Espresso Search Definitions	Application
ADM_SECPROCS	Security Processes	Barista
ADM_USER	User Record	Barista
ADM_USERFIRMS	User Firms	Barista
ADM_USERROLES	User Security Roles	Barista
ADQ_FAXEMAIL	Fax/Email Control Queue	Barista
ADS_AUTOLAUNCH	Auto Launch Processes	Application
ADS_CONFIGURE	Configuration Records	Barista
ADS_DOCUMENTS	Documents	Barista
ADS_DOC_GROUP	Document Group	Barista
ADS_DOC_SETCOLS	Holds Column Widths for DocOut	Barista
ADS_DOC_SETTINGS	Document Print Settings	Barista
ADS_FILTERS	Inquiry Filters	Barista
ADS_FILTER_COLS	Inquiry Filter Columns	Barista
ADS_LOG_SETTINGS	Build Log Settings	Barista
ADS_MASKS	System Input/Display Masks	Application
ADS_MESSAGES	System Message Table	Application
ADS_SELOPTS	Saved Selection Window Options	Barista
ADS_SEQUENCES	System Sequence Numbers	Application
ADS_USERLOG	User Log	Barista
ADT_AUDITLOG	Column Audit Log	Barista
ADT_ISSUELOG	System Issue Log	Barista
DDM_COMP_CODES	Data Compress Definitions	Barista
DDM_DRILL_DEFS	Drill Down Definitions	Application
DDM_EXP_CODES	Data Expand Definitions	Barista

DDM_HELP	Help Document Links	Barista
SQL_DB	SQL Database	Barista
SQL_DB_USERS	SQL Database Users	Barista

The Sync File Backup creates the xml files in separate locations.

- "Tagged" or "branded" records (listed as Application records in the table above) are those containing a Company and Product ID. They are stored as follows:
  - Prior to Version 11.x: <app\_project>/data/sync folder
  - Version 11.x and higher: <app\_project>/data/admin\_backup folder
- "Untagged" or "non-branded" records (listed as Barista records in the table above) are stored as follows:
  - Prior to Version 11.x, these files are copied to a directory selected by the user. The selection of this directory will vary based on the version currently being run:
    - Version 9.x users will select a location from the application tree located on the right hand side of the utility form (**Figure 1**). BASIS suggests selecting an application created by you when specifying where to store the xml backup files. Selecting a BASIS application location (<basis\_home>/apps/) may cause data loss when uninstalling/installing the newer BBJ/Barista version.
    - Version 10.x users will enter an existing directory on disk that may be used as a backup location (**Figure 2**). It is recommended that the Backup Directory specifies the sync directory under a project that will be synced (imported) into the new Barista version.
  - Version 11.x and higher automatically copies these records into Barista's admin\_backup directory (no user-selected location is required, as shown in **Figure 3**).



**Figure 1.** Sync Record Backup utility, Version 9.x

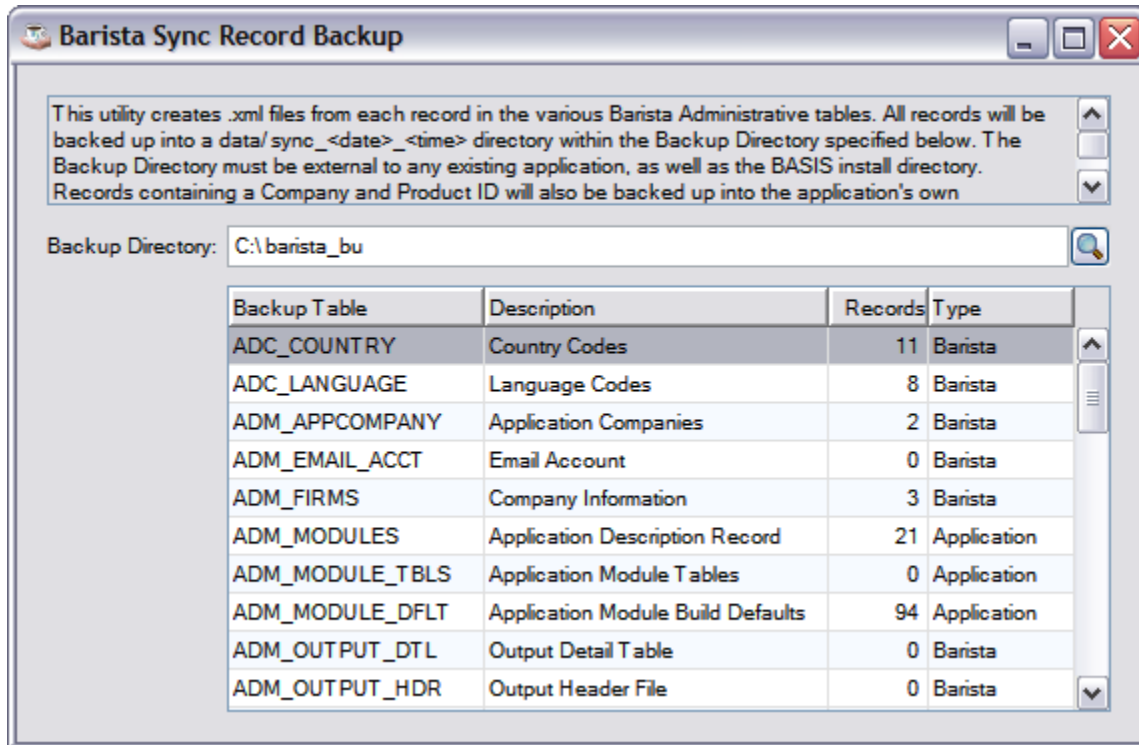


Figure 2. Sync Record Backup utility, Version 10.x

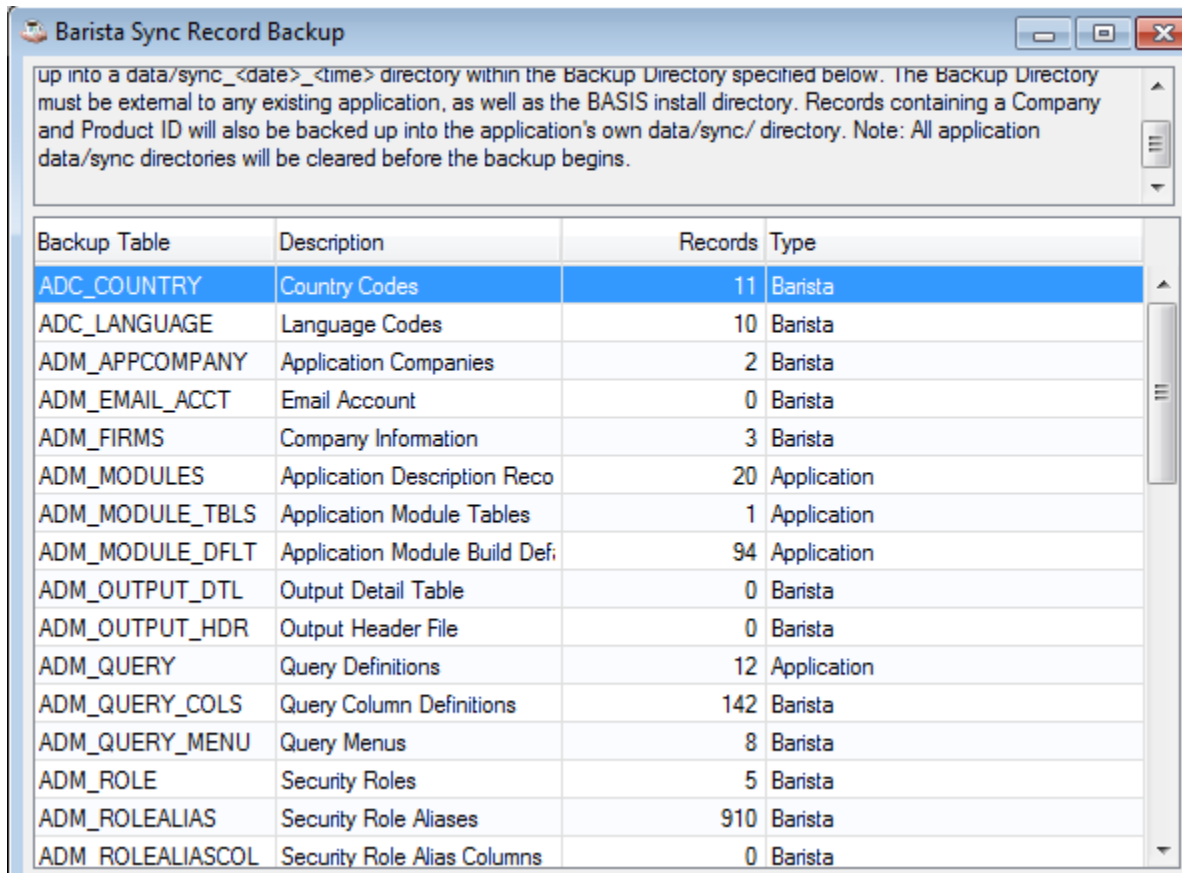


Figure 3. Sync Record Backup, Version 11.x and higher

When the Sync Backup is complete, make copies of the folder containing the newly backed-up "untagged" xml files:

- For the version 9.x utility, this is the data/sync directory located in the selected applications folder.
- For the version 10.x, this is the directory specified during the Sync Backup. Note - there is no need to make an additional copy if you specified a location outside of <basis\_home> and outside of the Barista file system
- For version 11.x and higher, if doing an in-place Barista upgrade, copy the admin\_backup folder to an outside location.

In addition, before beginning the upgrade:

- If your client data resides in the <basis\_home>/apps/ directory hierarchy, ensure it is backed up.
- If you have created custom applications using Barista, make a copy of your <basis\_home>/barista/sys/config/barista.syn file.
- If using the default document archiving settings, all documents generated by the Document Output System have been saved in the Barista file system (in <basis\_home>/barista/documents/). Make a backup copy of your documents.

**Note:** To avoid this issue in the future, add the following STBL references in your <app\_project>/config/<project>.syn file, changing <app\_project> to the desired directory. This will direct all document output to the specified directory instead of the Barista system directory:

- STBL=SET +DOC\_DIR\_PDF=<app\_project>/documents/
- STBL=SET +DOC\_DIR\_HTM=<app\_project>/documents/
- STBL=SET +DOC\_DIR\_XML=<app\_project>/documents/
- STBL=SET +DOC\_DIR\_CSV=<app\_project>/documents/
- STBL=SET +DOC\_DIR\_TXT=<app\_project>/documents/
- STBL=SET +DOC\_DIR\_DEFAULT=<app\_project>/documents/
- STBL=SET +DOC\_DIR\_ARCHIVE=<app\_project>/documents/archive/

## Install BBJ/Barista

**Note:** As of version 10.x It is no longer necessary to uninstall BASIS products before installing the newer version, unless moving to an **earlier** version of the one installed. If the user intends to uninstall and clear the basis home directory, please ensure the recommended file copies (described above) are completed, or all administrative records will be lost.

After the installation is completed, and before starting Barista, perform the following steps only if you erased or cleared the <basis\_home>/barista directory:

1. Copy barista.syn back into <basis\_home>/barista/sys/config/.
2. Copy your documents back into their original location. If you were storing documents in <basis\_home>/barista/documents/, this would be a good time make the document archive changes described above.
3. Copy back Sync File Backup records in order for the Auto-Sync to find and process them
  - a. if you are upgrading from version 10.x, and specified a directory for the Create Sync File Backup *other than* your application's <app>/data/sync directory, copy the backed up .xml files into your application's <app>/data/sync directory.
  - b. for version 11.x and higher, copy the backed up admin\_backup folder into the Barista directory

## Barista Installation Manager

If you have used the Barista Installation Manager so that you've been running on an instance of Barista located outside of <basis\_home>, then once you install a new BBJ/Barista into <basis\_home> you can use the Install Manager to delete your old copy of Barista and install a new one in its place. **Note:** *prior to deleting Barista, verify that no application projects have been created inside the Barista file system, or this data will be lost when deleting Barista.*

Before Deleting Barista:

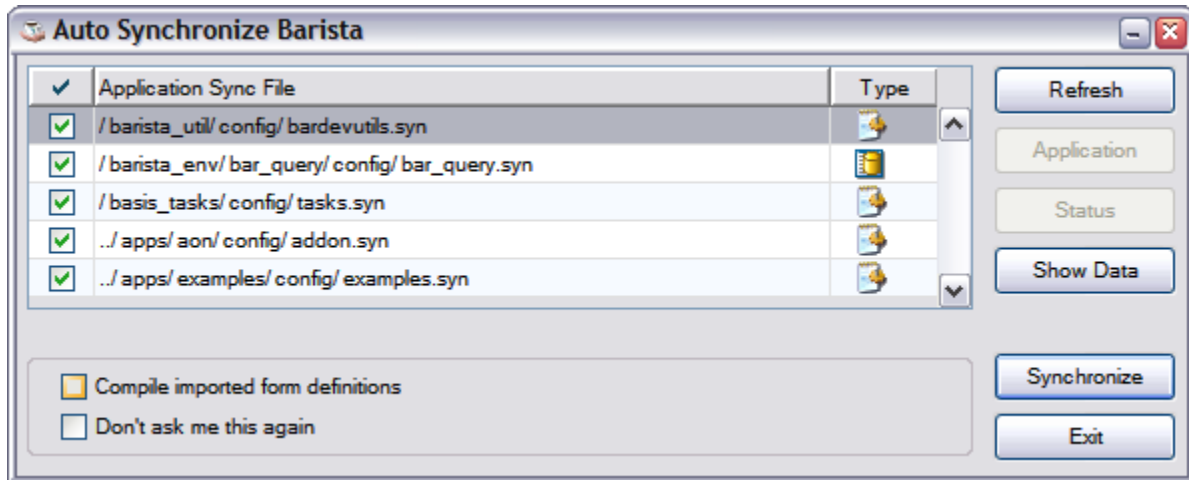
1. Verify that no application projects have been created inside the Barista file system, or this data will be lost.
2. Be sure you have followed the steps above to Create a Sync File Backup, and that you've moved the "untagged" files if/as needed:
  - a. Version 9.x: all files, tagged and untagged, should be in the data/sync folder corresponding to the application selected during the backup. No action is required.
  - b. Version 10.x: tagged files will be in the application's data/sync folder. Untagged files will be in the directory specified for the backup. So long as this directory resides outside of the Barista file system, no action is required.
  - c. Version 11.x and higher: tagged files will be in the application's data/admin\_backup folder. Untagged files will be in the barista/admin\_backup folder. *Move or copy this admin\_backup folder to an external location prior to deleting Barista.*
3. If you want to retain application settings (form dimensions, x/y positions, inquiry column settings, etc.), copy the barista/settings folder to a backup location.
4. If using the default document archiving settings, all documents generated by the Document Output System have been saved in the Barista file system (in barista/documents/). Make a backup copy of your documents (see note above about changing STBL settings for your document locations).

You can now use the Barista Installation Manager to delete the old copy of Barista, and install a new copy from <basis\_home> in its place. After the installation is completed, and before starting Barista, perform the following steps:

1. Copy your documents back into their original location, if applicable, or make the document STBL changes described above to eliminate this step for future upgrades.
2. Copy back the Sync File Backup records so the Auto-Sync can process them
  - a. if you are upgrading from version 10.x, and specified a directory for the Create Sync File Backup *other than* your application's <app>/data/sync directory, copy the backed up .xml files into your application's <app>/data/sync directory.
  - b. for version 11.x and higher, copy the backed up admin\_backup folder into the new Barista directory.
3. Copy back the barista/settings folder, if applicable.

## Barista and the Auto-Sync Utility

When launching Barista for the first time after installation, the Auto-Synchronize Barista (Auto-Sync) form displays. This utility scans both the directories specified in the config/barista.syn file (where custom applications projects are defined), and the <basis\_home>/apps/ directory hierarchy for any application synchronization (\*.syn) files.



All available <app\_project>.syn files are displayed in the grid. Pressing "Show Data" will display the contents of all currently selected sync files. All valid files are initially selected for inclusion in the sync process. Selecting/deselecting valid files in the upper grid manually modifies the Synchronize Utility to include/exclude the file, and its contents, as part of the sync process.

**Note:** If an <app\_project>.syn file has an invalid or corrupted format, it is not considered valid by the Auto-Sync utility and may not be selected.

Selecting "Compile imported form definitions" will instruct the utility to rebuild all forms as the definitions are imported into the new version of Barista. Generally, this option is not needed. During normal development, the <project> forms have already been built and reside in the <app\_project>/data/arc directory. Syncing the new Barista version will point the runtime engine to the existing form locations.

Press [Synchronize] to begin the sync/import process on the selected projects. Pressing [Exit] will exit the utility without synchronizing any files. The Auto-Sync Utility will display every time Barista is started until a sync is processed. To bypass the sync process and the auto launch, check "Don't ask me this again" before exiting the utility.

Once the synchronization is completed, the applications are ready to run in the latest version of Barista.

#### **Other upgrade considerations:**

In general you should not copy/paste any files from the previous Barista install except for the sync backup .xml files, barista.syn and document files mentioned earlier, as Barista system tables and/or barista.cfg file formats may have changed. In particular, don't copy/paste your barista.cfg from one install to another. If you need to add or change configuration settings for your application, make those changes in the application's .syn file (these can be edited with any text editor). This will ensure that the settings get incorporated into the new barista.cfg during the Auto-Sync.