FX-PROJECT ®

OPEN SOURCE

Version 21

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fx-project Open Source - Software UPDATE

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1 General

fx-project Open Source, Version 21, as of March 2022

1.1 Brief description

This tutorial explains step-by-step how to update an already installed version of fx-project Open Source to a newer version.

Unless otherwise described, instructions always refer to the Ultimate version of fx-project Open Source, as it includes all functionalities.

1.2 Imprint

FeRox Management Consulting GmbH & Co KG

Adolf Langer Way 11a
94036 Passau
Germany

Phone: +49-851-96671-0
Fax: +49-851-96671-10

Email: info@fx-project.de
Web: https://www.fx-project.org

Personally liable shareholder
FeRox Management Consulting Verwaltungs-GmbH
Passau Local Court, HRA Passau 13154

Managing Director
Walter Binder
Passau Local Court, HRB Passau 10384

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2 fx-project Open Source - Software Updates

2.1 Note

There are three ways to perform an update:

- **Update on a local server**

  If you use fx-project Open Source on a local server or in a separately set up virtual environment (e.g. VMware) and do not want to or cannot use the latest version for VMware provided by FeRox Management Consulting GmbH & Co. KG.

Notice:
Please check if the new fx-project Open Source version requires a new PHP version before updating on a local server! *If YES, the required PHP version must be installed first (see documentation "fx-project 03.1 - Script Language PHP").*

- **Update to a new VMware version**

  If you want to use fx-project Open Source in the latest version provided by FeRox Management Consulting GmbH & Co. KG for the VMware and only either the previous or the new VMware version should be active alone.

- **Migration between two VMware versions**

  If you want to use fx-project Open Source in the latest version for VMware provided by FeRox Management Consulting GmbH & Co. KG and have the possibility to run both the previous and the new VMware version in parallel.

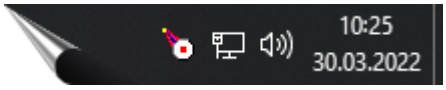
2.2 Update on a local server

2.2.1 Preparations: Stop server / backups

- Make sure that no user is working with fx-project Open Source anymore.
- If possible, stop the web server, e.g. under Linux as root with:

  service apache2 stop

  or e.g. under Windows by clicking on the Apache icon:



- Shrink and backup your current database.

  PostgreSQL, e.g. using **pg_dump**

  reindexdb -U postgres -F -q -a
  vacuumdb -U postgres -z -a
  pg_dump -U postgres -F c -x -f /act/_backups/**fxp.dmp** fxp

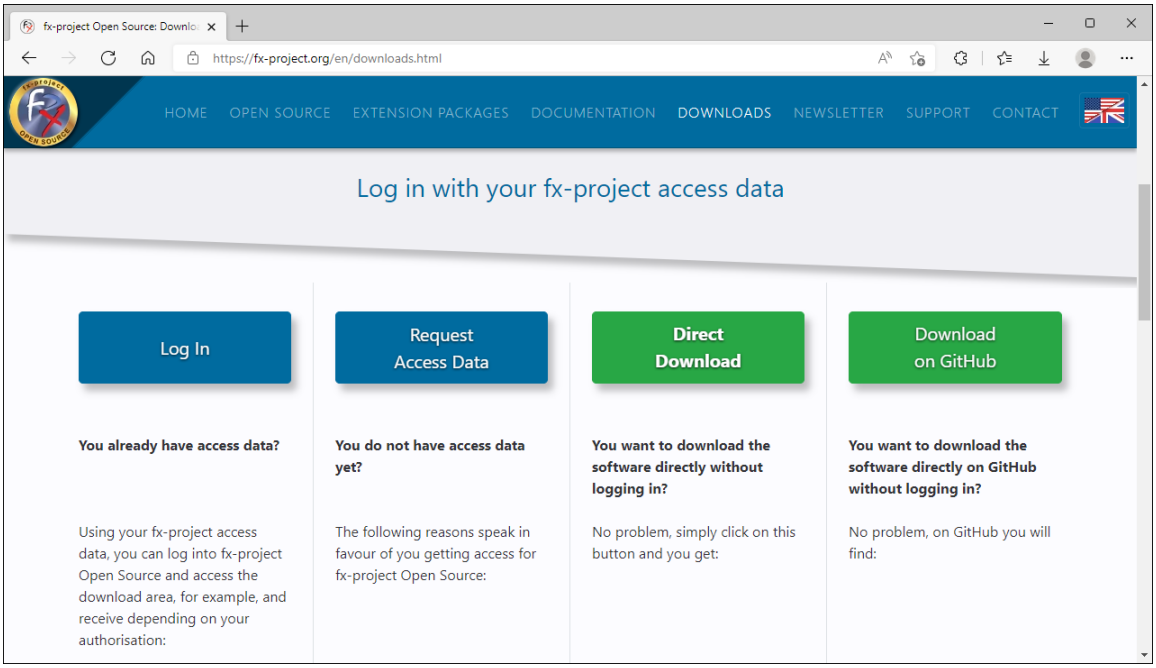
  with: postgres = database superuser
  /act/_backups/fxp**.dmp** = backup file
  fxp = current fx-project Open Source database

  Microsoft's SQL Server, e.g. using **SQL Server Management Studio**

- Rename the current fx-project Open Source directory, here e.g. to /act/web/**fxp-21.1** (21.1 corresponds e.g. to the version of fx-project Open Source currently installed at your site)
- Create a new directory with the old name of your fx-project Open Source directory, here e.g. /act/web/**fxp**

2.2.2 Download

On our website https://www.fx-project.org you can find the latest software version of fx-project Open Source including extension packages, documentation and patches in the [**Downloads**] section.

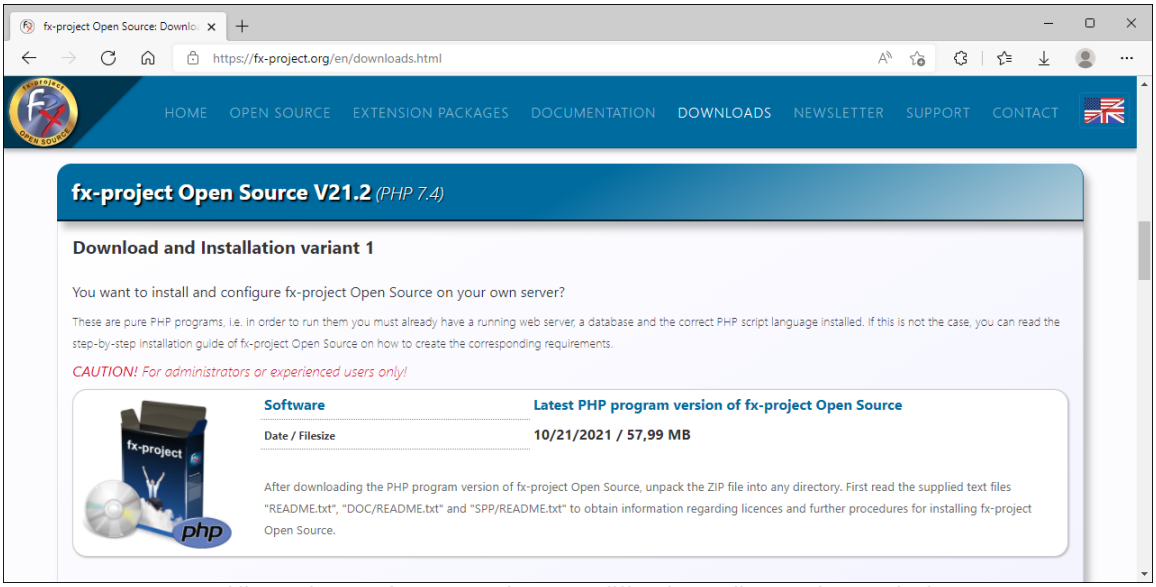


(Illustration 1: The screenshot may differ depending on the version)

Notice:
To access the download area of fx-project Open Source you need valid access data. If you do not have any access data yet, you can request new access data.

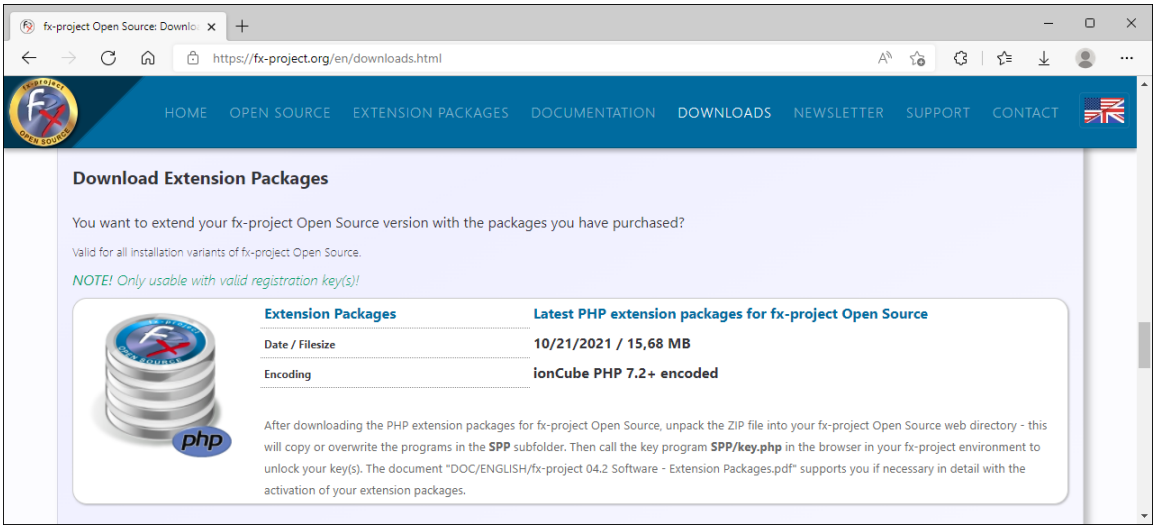
After logging in, you will see a listing of all available downloads.

Download the latest program version (**Software**) and unpack the file into the empty fx-project Open Source directory created before (here e.g. : /act/web/**fxp**), which you can access from your web server.



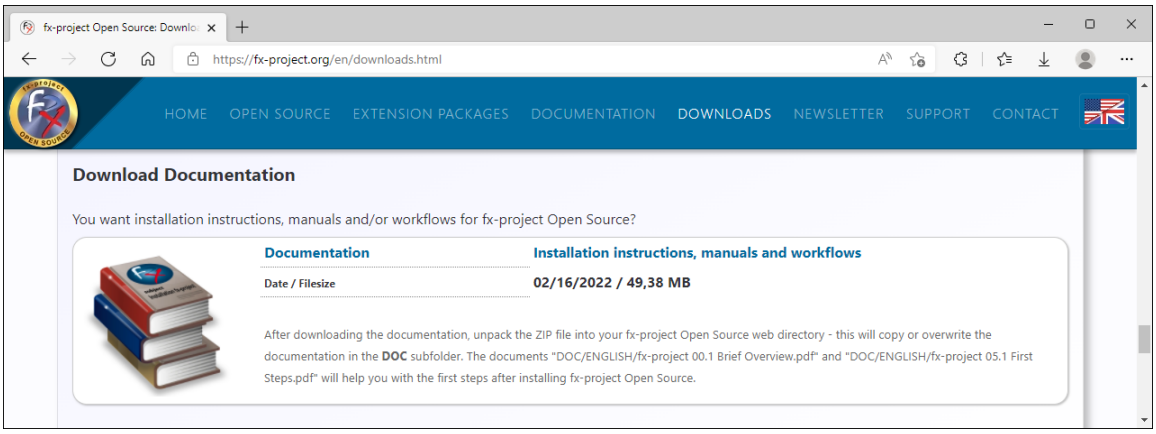
(Illustration 2: The screenshot may differ depending on the version)

If you have purchased **Extension Packages**, you can download the file and unpack it into your fx-project Open Source directory (here e.g.: /act/web/**fxp**).
➔ Overwrite any files that may already exist when unpacking.



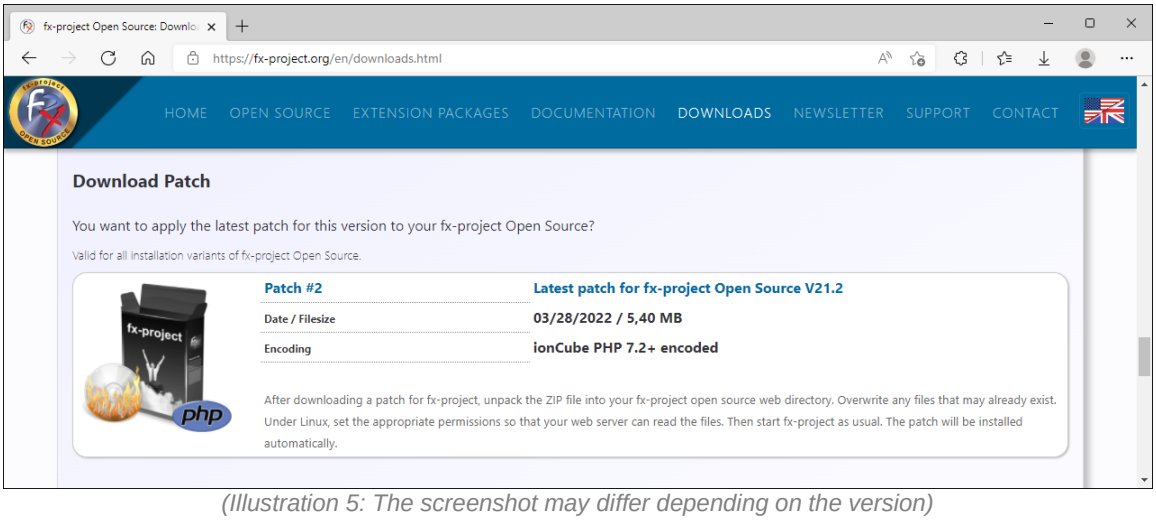
(Illustration 3: The screenshot may differ depending on the version)

If you need extensive **Documentation**, you can download the file and unpack it into your fx-project Open Source directory (here e.g.: /act/web/**fxp**).
➔ When unpacking, overwrite any files that may already exist.



(Illustration 4: The screenshot may differ depending on the version)

Now check if there are already adapted program parts (**Patch**) for this version. If yes, download the patch and unpack it into your fx-project Open Source directory (here e.g.: /act/web/**fxp**).
➔ Overwrite any files that may already exist when unpacking.



(Illustration 5: The screenshot may differ depending on the version)

2.2.3 Copy data

Change to the previously created backup directory (here e.g.: /act/web/**fxp-21.1**) and copy the following files from this directory to the new fx-project Open Source directory (here e.g.: /act/web/**fxp**). Use the appropriate subfolders if specified.

- ✓ Copy the fx-project Open Source initialization file, e.g. /act/web/fxp/**fx_project.ini**

- ✓ In the main folder /act/web/fxp/**DAT** you will find the client subfolders, which contain all data of a client (like person images, print settings, etc.). Copy all client subfolders recursively (i.e. with any subfolders) starting from "**1**" (e.g. subfolder "**1**" or "**6**" for data from client **1** or client **6** respectively).

  If you have changed settings in the global client subfolder "**0**", you should also make these changes in the client subfolder "**0**" of the new fx-project Open Source directory.

- ✓ The main folder /act/web/fxp/**KEY** contains all your purchased keys for the fx-project Open Source extension packages. Copy all the key files (format: **fxkey-{key number}.fpi**).

- ✓ The main folder /act/web/fxp/**LNG** contains text files for supported languages, e.g. menu or holiday files. If you have made changes yourself, you should also make or transfer them to the files in the new fx-project Open Source folder.

- ✓ The main folder /act/web/fxp/**LOG** contains log entries (e.g. who logged into fx-project Open Source and when, etc.). If you want to keep these, you should copy the contents as well. You should not copy the standard PHP file "index.php".

2.2.4 Assign rights

Make sure that the appropriate rights (read and write rights) are assigned to the new fx-project Open Source directory created (here: **fxp).**

Linux / Apache

You can find out the Apache user and group in the "**httpd.conf"** under the entries "**user**" and "**group**". By default, for example, "wwwrun" and "www".

You assign the read or write permissions to the fx-project Open Source directory, for example, as follows:

- **chown** -R wwwrun:www /act/web/**fxp**/
- **chmod** -R 775 /act/web/**fxp**/

Windows / IIS

Make sure that the web server process account (for IIS, the user **IUSR_[host name]** or **IWAM_[host name]**) has read or write access.

- Properties of the directory
- Click security settings
- Add: Restrict the "Search in" selection field to [*computer name*] and add the users with a double-click.
- Confirm with "OK" and set the rights.

2.2.5 Start server

- If you have stopped the server it must now be restarted, e.g. under Linux as root with:

  service apache2 start

  or e.g. under Windows by clicking on the Apache icon:

2.2.6 Preparations completed

This completes all preparations and you can now perform the actual update.

See for this: **Point 2.5 - Execute update**

2.3 Update to a new VMware version

2.3.1 Preparations

- Make sure that no user is working with fx-project Open Source anymore.

- Perform the following actions as the "root" user, since only this user has the corresponding rights. The default password is: "fx-project". To do this, open e.g. a terminal and change the current user with:

  su - root

- If possible, stop the web server, e.g. with:

  service apache2 stop

- Downsize and backup your current PostgreSQL database, e.g. using

  reindexdb -U postgres -F -q -a
  vacuumdb -U postgres -z -a
  pg_dump -U postgres -F c -x -f /act/_backups/**fxp.dmp** fxp

  with: postgres = database superuser
  /act/_backups/**fxp.dmp** = backup file
  fxp = current fx-project database

2.3.2 Back up data

Save the following data e.g. on a USB stick. This data will be copied to the new VMware version later.

Database

- ✓ Copy the previously created database backup, e.g. /act/_backups/**fxp.dmp**

DMS

- ✓ Copy the content of the **DMS folder**, e.g. /act/**dms**/ (the exact location can be found e.g. in the administrator settings in client 1) into a subfolder "**dms**".

fx-project

- ✓ Copy the fx-project Open Source initialization file, e.g. /act/web/fxp/**fx_project.ini**

- ✓ In the main folder /act/web/fxp/**DAT** you will find the client subfolders, which contain all data of a client (like person images, print settings, etc.). Copy all client subfolders recursively (i.e. with any subfolders) starting from "**1**" (e.g. subfolder "**1**" or "**6**" for data from client **1** or client **6** respectively).

  If you have changed settings in the global client subfolder "**0**", you should also make these changes in the client subfolder "**0**" of the new fx-project Open Source directory.

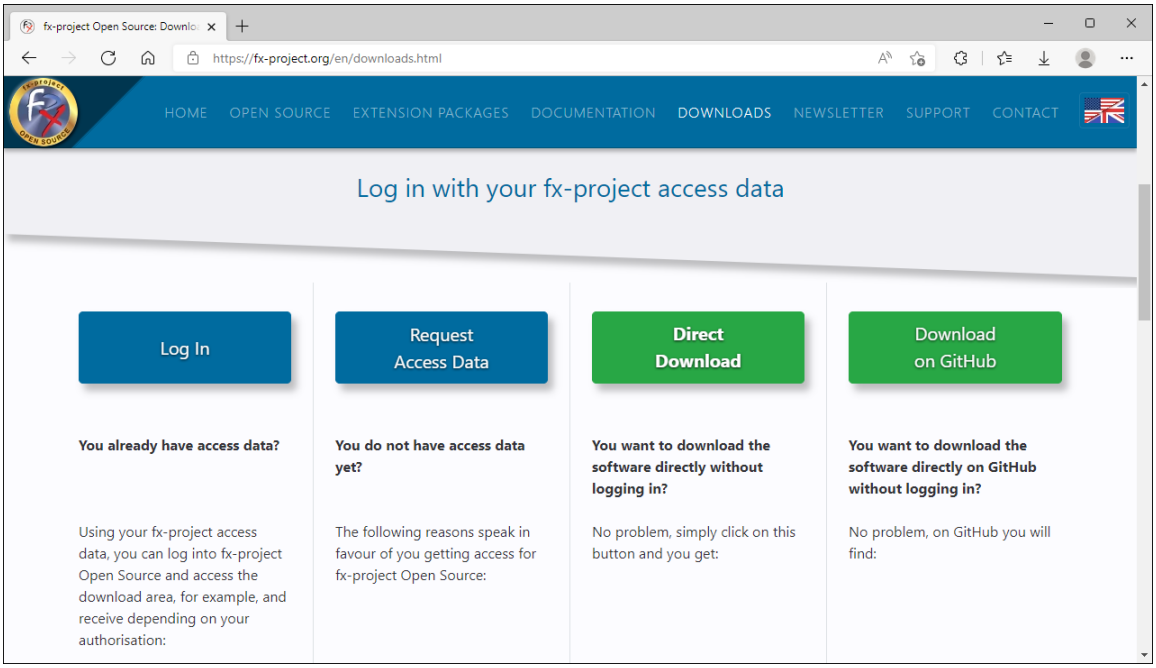
- ✓ The main folder /act/web/fxp/**KEY** contains all your purchased keys for the fx-project Open Source extension packages. Copy all the key files (format: **fxkey-{key number}.fpi**).

- ✓ The main folder /act/web/fxp/**LNG** contains text files for supported languages, e.g. menu or holiday files. If you have made changes yourself, you should also make or transfer them to the files in the new fx-project Open Source folder.

- ✓ The main folder /act/web/fxp/**LOG** contains log entries (e.g. who logged into fx-project Open Source and when, etc.). If you want to keep these, you should copy the contents as well. You should not copy the standard PHP file "index.php".

2.3.3 Download

On our website https://www.fx-project.org you can find the latest VMware version of fx-project Open Source including extension packages, documentation and patches in the [**Downloads**] section.

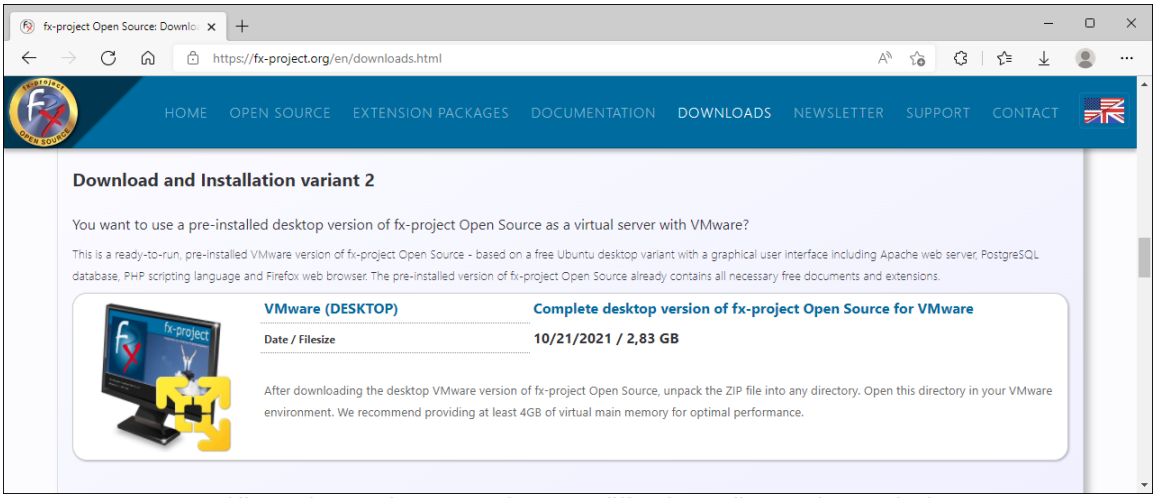


(Illustration 6: The screenshot may differ depending on the version)

Notice:
To access the download area of fx-project Open Source you need valid access data. If you do not have any access data yet, you can request new access data.

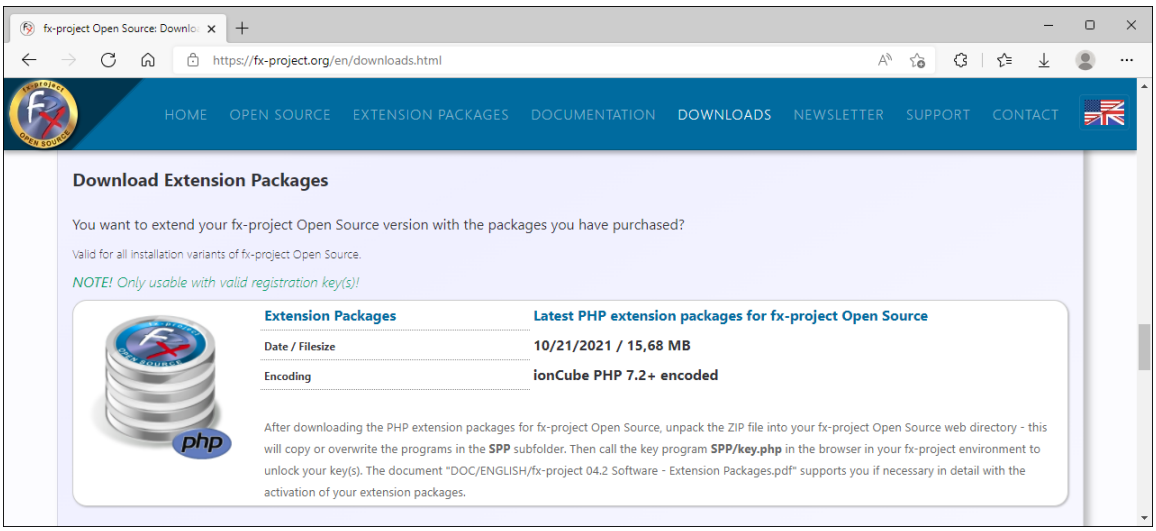
After logging in, you will see a listing of all available downloads.

Download the latest VMware version (**VMware**) either in the DESKTOP or SERVER variant (depending on your preference and/or computer knowledge) and extract the file into your default VMware subfolder of your virtual machines. This will create a subfolder "**fx-project OS V21.2 (VFXPOSD, Ubuntu-20.04.3-LTS-DESKTOP)**" (DESKTOP variant) or "**fx-project OS V21.2 (VFXPOSS, Ubuntu-20.04.3-LTS-SERVER)**" (SERVER variant) or similar with five files.



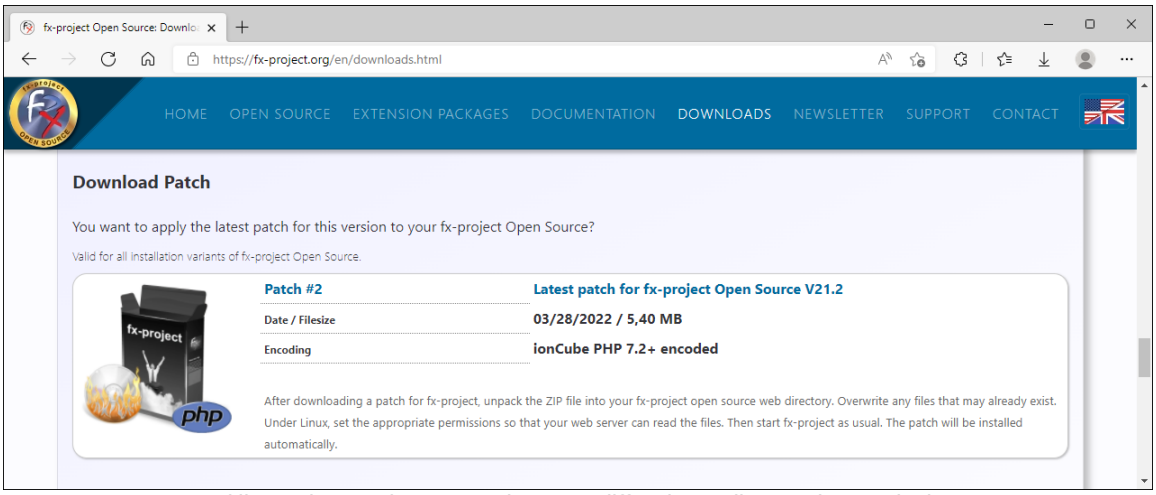
(Illustration 7: The screenshot may differ depending on the version)

If you have purchased **Extension Packages**, you can download the file and copy the ZIP file to the above USB stick.



(Illustration 8: The screenshot may differ depending on the version)

Now check if there are already adapted program parts (**Patch**) for this version. If so, download the patch and copy the ZIP file to the above USB stick.



(Illustration 9: The screenshot may differ depending on the version)

2.3.4 Launch VMware

Start the VMware and open the previously downloaded and unzipped version of fx-project Open Source.

How to install and/or set up VMware you can read again in this document here:

- **fx-project 04.1 VMware - Installation.pdf**

2.3.5 Copy data

Now copy the previously backed up data from the USB stick to the virtual Ubuntu fx-project Open Source Server.

Database

- ✓ Copy the database backup "**fxp.dmp**" to /act/_**backups**

DMS

- ✓ Copy the content of the DMS folder "**dms**" to /act/**dms/fxp**

fx-project

- ✓ Copy the initialization file **fx_project.ini** to /act/web/**fxp**
- ✓ If available, copy all key files (format: **fxkey-{key-number}.fpi**) to /act/web/**fxp/KEY**
- ✓ Copy all client subfolders recursively (i.e. with any subfolders) to /act/web/**fxp/DAT**
- ✓ If you have changed settings in the global client subfolder "**0**", you should also make these changes in the client subfolder "**0**" of the new fx-project Open Source directory.
- ✓ If you have changed texts in the language folder "**LNG**", you should also make these changes in the language folder /act/web/**fxp/LNG** of the new fx-project Open Source directory.
- ✓ If present, copy the contents of the "**LOG**" subfolder to /act/web/**fxp/LOG**

Extension packages

- ✓ If downloaded, copy the ZIP file of the extension packages into the fx-project Open Source main folder /act/web/**fxp** and unpack it. Overwrite all existing files. The ZIP file can now optionally be deleted.

Patch

- ✓ If downloaded, copy the ZIP file of the patch into the fx-project Open Source main folder /act/web/**fxp** and unpack it. Overwrite all existing files. The ZIP file can now optionally be deleted.

2.3.6 Assign rights

Assign the read or write permissions so that the Apache web server with PHP can access the newly copied data:

- ➢ **chown** -R wwwrun:www /act/web/fxp/
- ➢ **chmod** -R 775 /act/web/fxp/

- ➢ **chown** -R wwwrun:www /act/dmsfxp/
- ➢ **chmod** -R 775 /act/dms/fxp/

2.3.7 Import database

By default, a new VMware version of fx-project Open Source is delivered without a pre-installed database, as this is automatically created during an initial installation.

However, in order for your data to continue to be used and for an update to the new version to be performed, you must create an empty database yourself with the same name as before and then import the data from the backup (= Restore):

- **createdb** -U postgres -E UTF8 -l de_DE.UTF-8 -T template0 -W -e fxp

Notice:
The locale must be installed on your system, e.g. here de_DE.UTF-8 for Germany, or en_US.UTF-8 for USA, or en_GB.UTF-8 for Great Britain. Type the command "locale" to get a listing of your installed locales. *The name of the database to be created (here: fxp) must match the old database name if you want to continue using the keys for extension packages - otherwise the keys lose their validity.* *Enter the password that you also specified in fx_project.ini as the password.* *Alternatively, you can also adjust the password in fx_project.ini to the password assigned here.*

- **pg_restore** -U postgres -d fxp /act/_backups/fxp.dmp

2.3.8 Preparations completed

This completes all preparations and you can now perform the actual update.

See for this: **Point 2.5 - Execute update**

2.4 Migration between two VMware versions

2.4.1 Source VMware: Preparations

- Make sure that no user is working with fx-project Open Source anymore.
- Perform the following actions as the "root" user, since only this user has the corresponding rights. The default password is: "fx-project". To do this, open e.g. a terminal and change the current user with:

  su - root

- If possible, stop the web server, e.g. with:

  service apache2 stop

- Create backup directory

  cd /act/web
  mkdir backup

2.4.2 Source VMware: Back up data

- Shrink and backup database

  reindexdb -U postgres -q -a
  vacuumdb -U postgres -z -a
  pg_dump -U postgres -F c -x -f /act/web/backup/fxp.dmp fxp

- Backup DMS

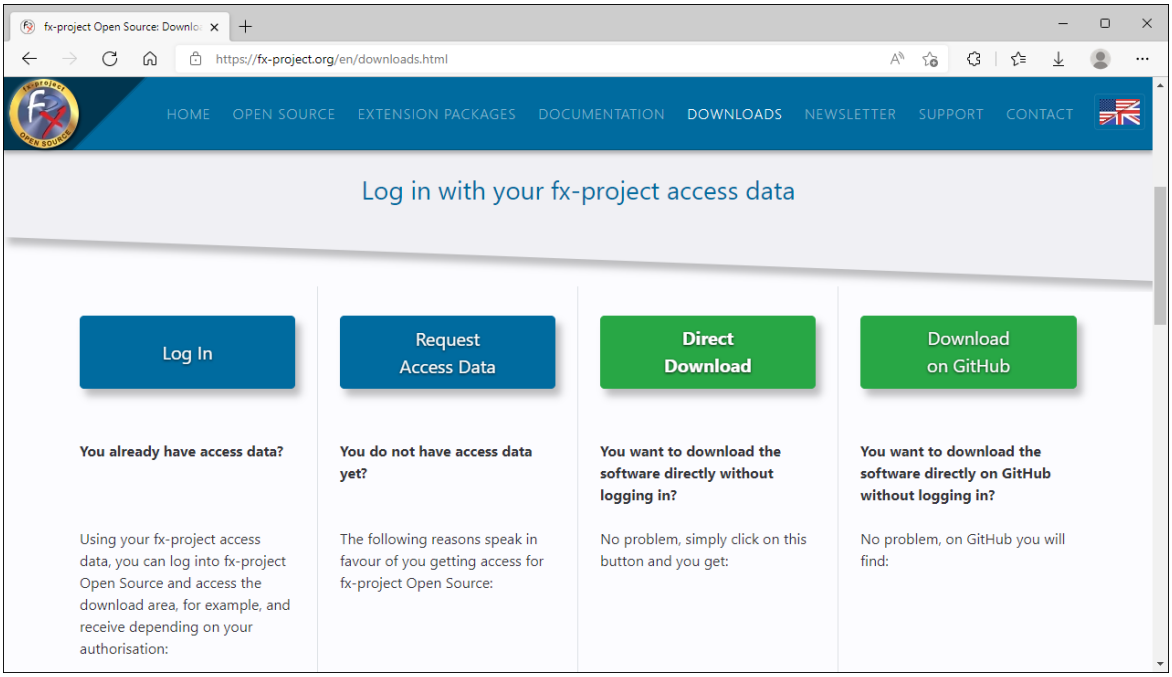
  \cp -Rf /act/dms /act/web/backup

- fx-project Open Source backup

  \cp -Rf /act/web/fxp /act/web/backup

2.4.3 Download

On our website https://www.fx-project.org you can find the latest VMware version of fx-project Open Source including extension packages, documentation and patches in the [**Downloads**] section.

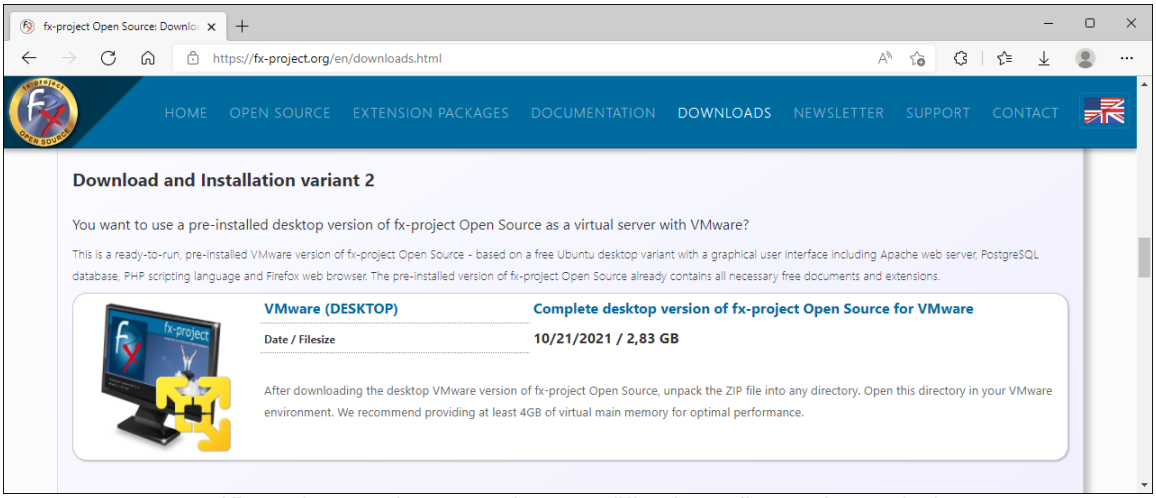


(Illustration 10: The screenshot may differ depending on the version)

Notice:
To access the download area of fx-project Open Source you need valid access data. If you do not have any access data yet, you can request new access data.

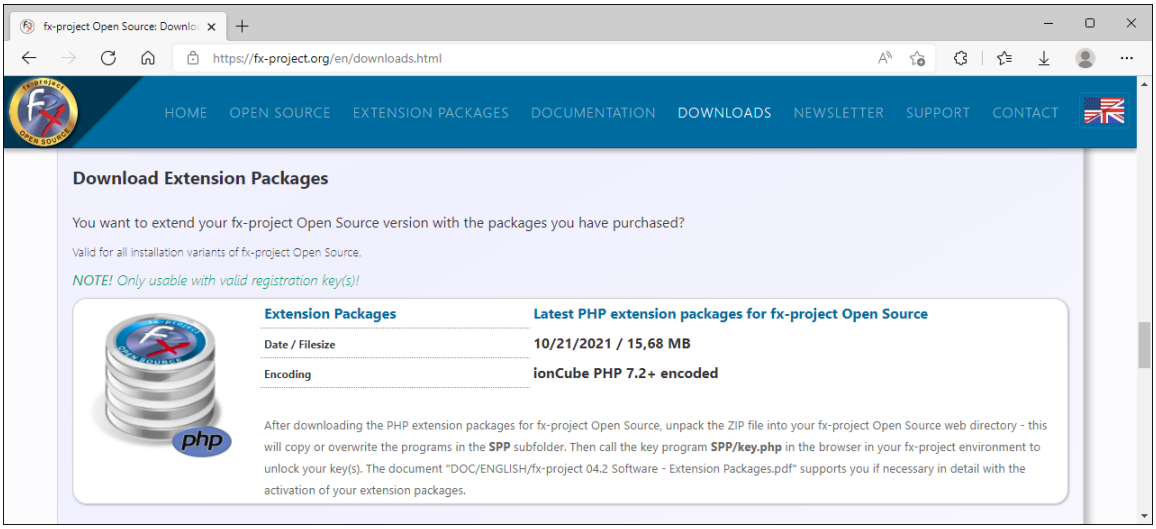
After logging in, you will see a listing of all available downloads.

Download the latest VMware version (**VMware**) either in the DESKTOP or SERVER variant (depending on your preference and/or computer knowledge) and extract the file into your default VMware subfolder of your virtual machines. This will create a subfolder "**fx-project OS V21.2 (VFXPOSD, Ubuntu-20.04.3-LTS-DESKTOP)**" (DESKTOP variant) or "**fx-project OS V21.2 (VFXPOSS, Ubuntu-20.04.3-LTS-SERVER)**" (SERVER variant) or similar with five files.



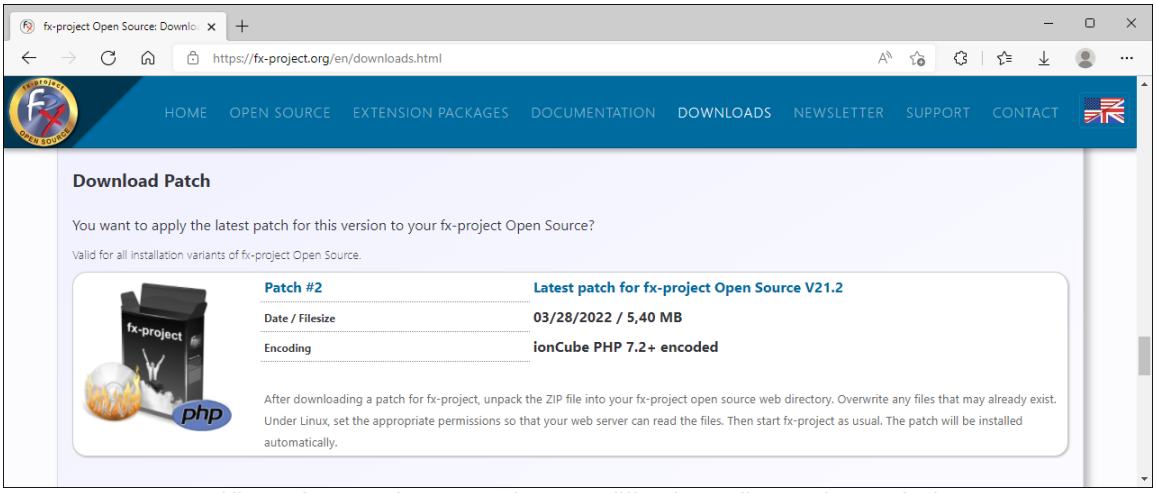
(Illustration 11: The screenshot may differ depending on the version)

If you have purchased **Extension Packages**, you can download the file and copy the ZIP file to /act/web/backup of the source VMware.



(Illustration 12: The screenshot may differ depending on the version)

Now check if there are already customized program parts (**Patch**) for this version. If so, download the patch and copy the ZIP file to /act/web/backup of the source VMware.



(Illustration 13: The screenshot may differ depending on the version)

2.4.4 Source VMware: Compress data

- Compress/Zip backup folder

  tar zcf /act/web/backup.tar.gz /act/web/backup

- Assign rights

  chown -R wwwrun:www /act/web
  chmod -R 755 /act/web

If possible, start the web server, e.g. with:

service apache2 start

- Determine IP address of this source computer for later download from the target computer, displayed as **inet** *(here e.g. 192.168.0.1)*

  ifconfig

2.4.5 Start target VMware

Start the target VMware and open the previously downloaded and unzipped version of fx-project Open Source.

How to install and/or set up VMware you can read again in this document here:

- **fx-project 04.1 VMware - Installation.pdf**

2.4.6 Target VMware: Restore data

- Perform the following actions as the "root" user, since only this user has the corresponding rights. The default password is: "fx-project". To do this, open e.g. a terminal and change the current user with:

  su - root

- If possible, stop the web server, e.g. with:

  service apache2 stop

- Get backup from source computer (see IP under point 2.4.4) and unpack it

  cd /
  wget http://192.168.0.1/backup.tar.gz
  tar zxf backup.tar.gz

- Restore DMS

  \cp -Rf /act/web/backup/dms/* /act/dms

- fx-project Open Source Restore client folder *(here e.g. folder "1" - repeat for all client folders)*

  \cp -Rf /act/web/backup/fxp/DAT/1 /act/web/fxp/DAT

- fx-project Open Source key restore

  \cp -Rf /act/web/backup/fxp/KEY/fxkey* /act/web/fxp/KEY

- fx_project.ini, log and user sessions restore

  \cp -f /act/web/backup/fxp/fx_project.ini /act/web/fxp

- **\cp** -Rf /act/web/backup/fxp/LOG/* /act/web/fxp/LOG

  \cp -Rf /act/web/backup/fxp/DAT/USR/C* /act/web/fxp/DAT/USR
  \cp -Rf /act/web/backup/fxp/DAT/USR/L* /act/web/fxp/DAT/USR

- If available, extension packages, unpack and delete ZIP file

  \cp -Rf /act/web/backup/fxpos_021002000_PCK_* /act/web/fxp
- **tar** zxf /act/web/fxp/fxpos_021002000_PCK_*
  (Overwrite all files: A=All)
  rm -f /act/web/fxp/fxpos_021002000_PCK_*

- If available, add patch, unpack and delete ZIP file

  \cp -Rf /act/web/backup/fxpos_021002000_PAT_* /act/web/fxp
  tar zxf /act/web/fxp/fxpos_021002000_PAT_*
  (overwrite all files: A=All)
  rm -f /act/web/fxp/fxpos_021002000_PAT_*

- Assign rights

  chown -R wwwrun:www /act/web
  chmod -R 755 /act/web

  chown -R wwwrun:www /act/dms/fxp
  chmod -R 755 /act/dms/fxp

- Create, restore and shrink database

  createdb -U postgres -E UTF8 -l de_DE.UTF-8 -T template0 -W -e fxp

Notice:

The locale must be installed on your system, e.g. here de_DE.UTF-8 for Germany, or en_US.UTF-8 for USA, or en_GB.UTF-8 for Great Britain. Type the command "locale" to get a listing of your installed locales.

The name of the database to be created (here: fxp) must match the old database name if you want to continue using the keys for extension packages - otherwise the keys lose their validity.

Enter the password that you also specified in fx_project.ini as the password.

Alternatively, you can also adjust the password in fx_project.ini to the password assigned here.

  pg_restore -U postgres -d fxp /act/web/backup/fxp.dmp

  reindexdb -U postgres -q -a
  vacuumdb -U postgres -z -a

- Optional: Delete backup files of the previous version

  rm -Rf /act/web/backup*
  rm -f /backup.tar.gz

- If possible, start the web server, e.g. with:

  service apache2 start

2.4.7 Preparations completed

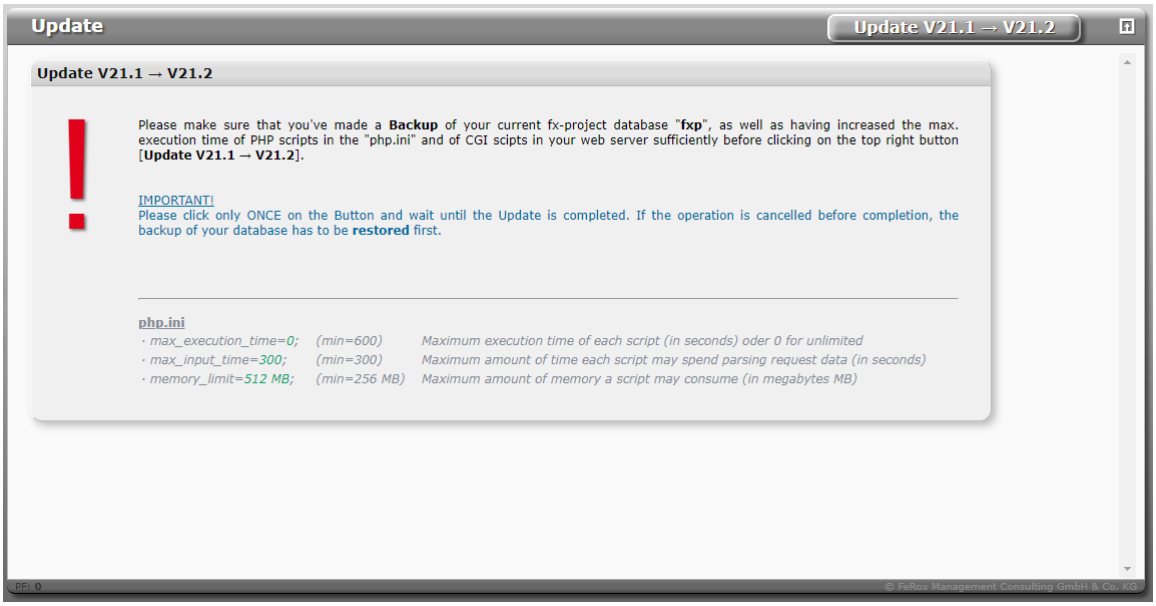
This completes all preparations and you can now perform the actual update.

See for this: **Point 2.5 - Execute update**

2.5 Execute update

To do this, start fx-project Open Source as usual in your web browser by entering the correct URL, e.g. "**http://localhost/index.php**", or the new target VMware, e.g. "**http://192.168.0.2/index.php**"

The update screen appears and shows you a version update hint from the "old" to the "new" version number.



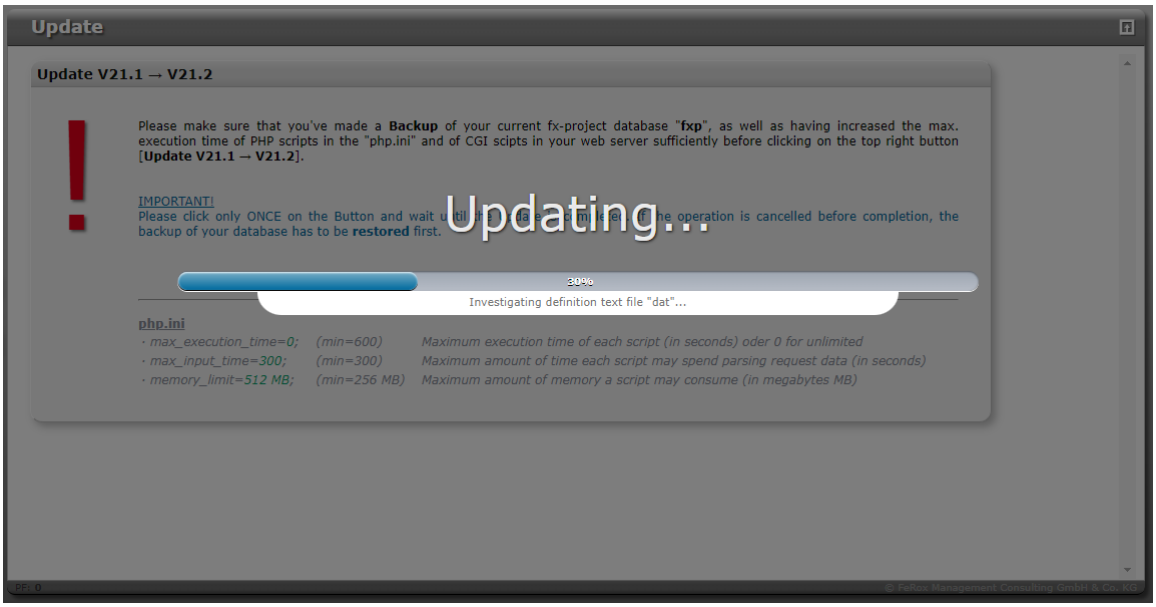
(Illustration 14: The screenshot may differ depending on the version)

Follow the instructions on the screen. After all points have been observed, click **Update** in the upper right corner to start.

The update can take several minutes depending on the system. *(Usually about 1-5 minutes).*

During the update you can follow the progress by the bar.

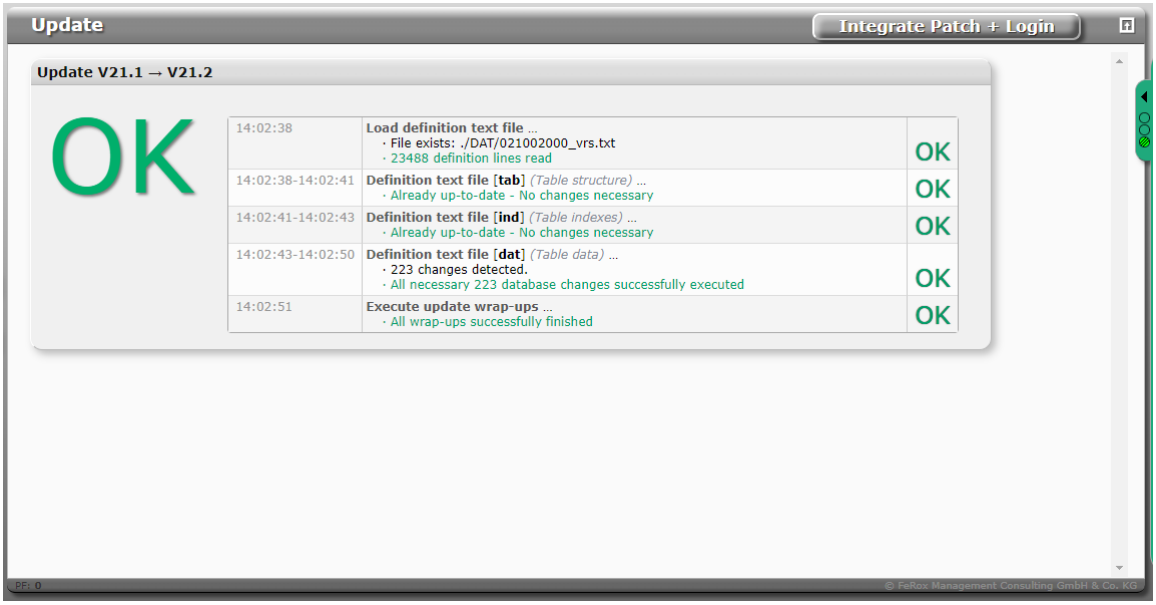
The update compares the current actual state of your version with the target state of the new version and makes all necessary changes.



(Illustration 15: The screenshot may differ depending on the version)

If, contrary to expectations, problems occur, please send us in case of error:

- the detailed update log file in the "**LOG**" subfolder of fx-project Open Source (e.g. **upd_021001000-021002000_20220330135744.log**)
- or contact us by phone at **+49-851-96671-0**.

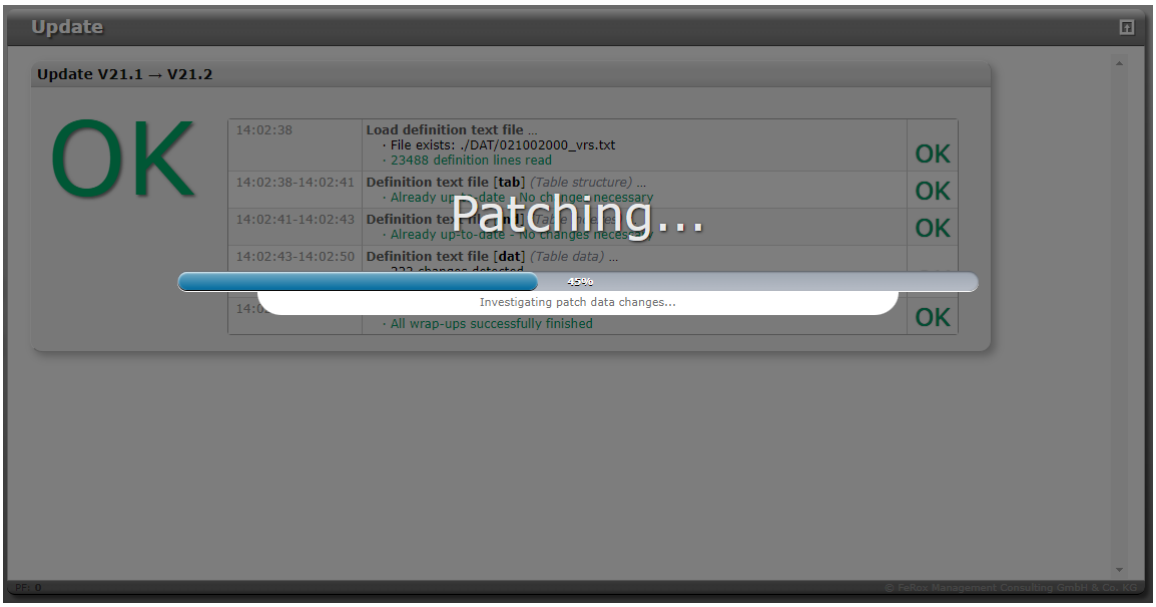


(Illustration 16: The screenshot may differ depending on the version)

After successful installation, the **Login** button will appear in the upper right corner. If you click on it, the usual fx-project Open Source login page will be displayed.

Optional: If there is a patch to apply, the following button appears instead **Integrate Patch + Login**. When you click on it, the patch will be applied.

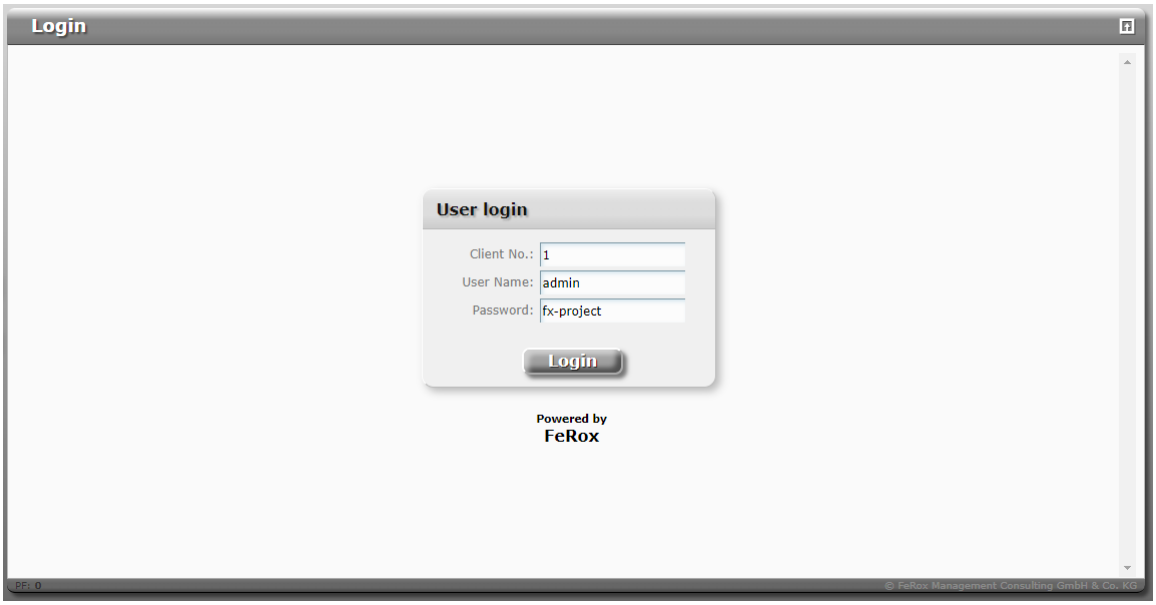
Optional: If there is a patch to be applied, it will now be integrated, i.e. the necessary database changes will be made.



(Illustration 17: The screenshot may differ depending on the version)

After successfully applying the patch, the usual fx-project Open Source login page is displayed.

2.5.1 Login



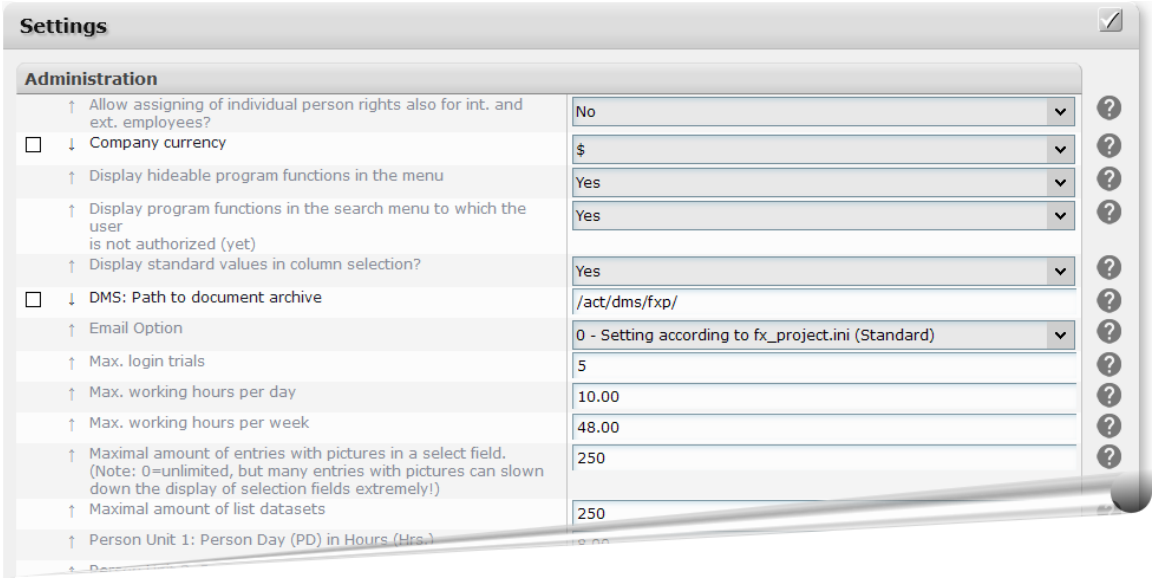
(Illustration 18: The screenshot may differ depending on the version)

2.6 Customize DMS directory

If the DMS directory of your previous fx-project Open Source installation differs from the path of the new installation, e.g. the new Ubuntu VMware version (here e.g. **/act/dms/fxp/**) you have to correct this by logging in as administrator in client 1 and using the program function

Administration ▶ Client ▶ **Client Settings**

change the setting value for "**DMS: Path to document archive**" to **/act/dms/fxp/**.



(Illustration 19: The screenshot may differ depending on the version)

Notice:

The default backups for the DMS as a cronjob back up the contents of the /act/dms/fxp/ path.

If you want to keep your old DMS path, you have to manually coordinate fx-project Open Source with your path and modify the cronjob accordingly.

The DMS-cronjob file is located in /act/_cronjobs/dms_backup.

3 Third-Party Software Notice

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