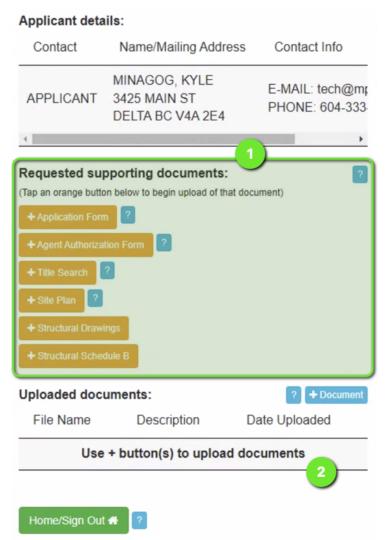


December 2023

DocuPro 80000/121 - Upgrading from 80000/119

The 121 upgrade for DocuPro delivers the ability to optionally specify a set of 1 or more "requested" documents associated with application types. This screenshot shows the new features:



- 1. This is the primary new capability. Any number of documents can be specified for upload along with an application. The wording "Requested" is intentional, as the applicant is not required to upload these. An optional help button beside each upload button can give instructions as to what the document is intended for, and include links to allow downloading a blank document.
- 2. Because there are now multiple ways that uploads can start, the wording for the empty Uploaded documents table was changed to be slightly more generic.

Recommendations for a smooth upgrade

It is highly recommended to do these steps on your Test DocuPro system first! Once the new software has been installed, all of the new features for this update are controlled through changes to the internal Web.config file. The released Web.config file for the internal Webservices shows examples of how the new features can be implemented.

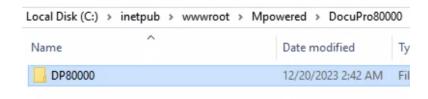
The excellent online Web.config validator at

https://elmah.io/tools/config-validator/ should be used often while you are making changes to your Web.config - it can really reduce headaches! The steps below assume that you have not made changes to the key numbering system from what Mpowered released through the previous releases. If, while going through these changes, you find your numbering doesn't match what is shown, you will have to adjust for your changes. Also, remember that Mpowered is just an email away, and we would love to help solve any issues you are having.

<u>Before upgrading Test - Making sure your Test DocuPro matches your Live</u> <u>DocuPro</u>

If your Test system does not materially match your Live system (or you're not sure), you'll want to make sure Test matches Live. Here's one way to do that.

On your **external** <u>Test</u> web server will be a directory with the DocuPro 119 package running in it:

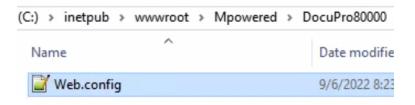


Copy the entire directory, and rename it to DP80000.119:

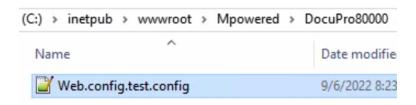


Now we have a full backup.

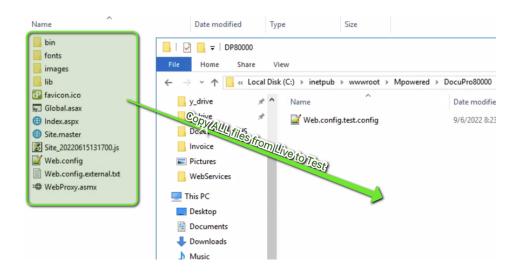
Go into the DP80000 directory, and delete all the files except the Web.config:



Rename the Web.config file to Web.config.test.config:



Now copy ALL the files from the **external** <u>Live</u> web server with the DocuPro 119 package running in it - into the Test DP80000 directory:



Now, open the Web.config.test.config and copy the appname and webservice key lines:

```
<add key="appname" value="DP800000 EVCL7" />
<add key="webservice" value="http://localhost/Mpowered</pre>
```

and paste them into the Web.config file (that came from Live) over top of the same lines. Now delete the Web.config.test.config file.

Now we're going to do a similar thing for the internal webservices. On your **internal** <u>Test</u> web server will be a directory with the DocuPro 119 package running in it:

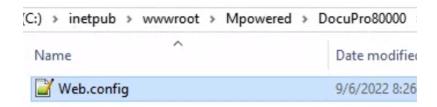


Copy the entire directory, and rename it to DP80000WS.119:

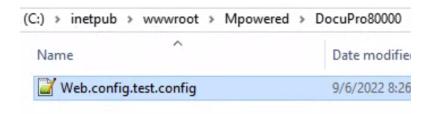


Now we have a full backup.

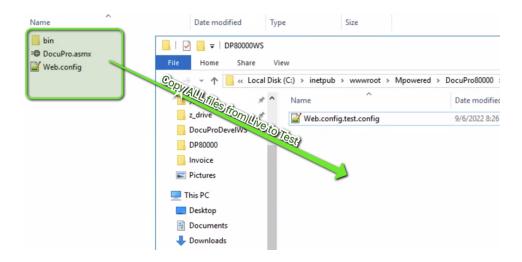
Go into the DP80000WS directory, and delete all the files except the Web.config:



Rename the Web.config file to Web.config.test.config:



Now copy ALL the files from the **internal** <u>Live</u> web server with the DocuPro 119 package running in it - into the Test DP80000WS directory:



Now, open the Web.config.test.config and copy the lines shown here:

```
<
```

and paste them into the Web.config file (that came from Live) over top of the same lines. Now delete the Web.config.test.config file.

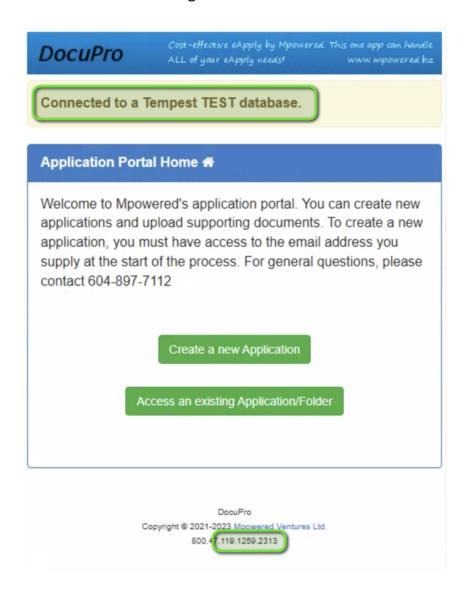
These keys in the Web.config are significant with regards to Live/Test
DocuPro knows it is connected to a Test database when the Test flag is turned on:



in Tempest > Tools > Configuration > Database > Change System Details.

For emails, app-725.015 and app-725.017 keys are used when it's a Test database: For applications that handle ecom payments, app-740.560 is used for Live and app-740.561 is used for Test. This allows you to modify and test the Web.config in Test, and then (provided your Prospero setup is the same in the Test/Live databases) copy the tested Web.config over to Live without making any changes, and DocuPro will know to use the Live keys.

If you run the Test DocuPro site now, you should see the DocuPro Home page come up, with the "Connected to a Tempest TEST database" notification, and the bottom version line showing 800.nn.119.1259.2313:



The important part of the version line is the 119.1259.2313. 119 is the package number, 1259 is the client build #, and 2313 is the web services build number. Now, we have ensured that our Test DocuPro matches our Live DocuPro, but is connected to a Test Tempest database, so we can proceed with the upgrade steps shown next.

<u>Installing the 121 update files into Test</u>

On the mpowered.biz website, under Downloads, you will find DocuPro 80000 Package 121:

DocuPro Ver. 80000 (Jun 15, 2021)

• ♣ DocuPro 80000 Package 113: Download

• ♣ Setup and User Guide: PDF

• ♣ DocuPro 80000 Package 115 (Sep 7, 2021): Download (See DocuPro.asmx/A

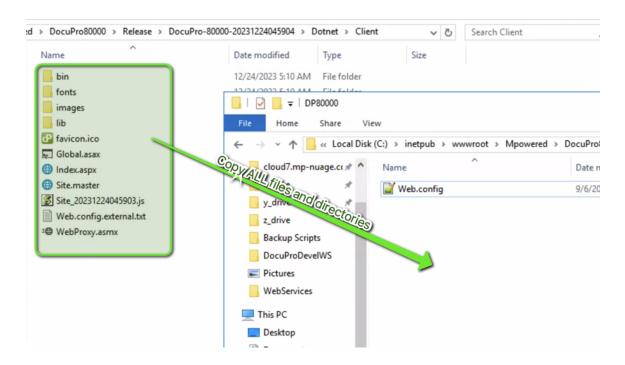
• ♣ DocuPro 80000 Package 117 (Dec 13, 2021): Download (See DocuPro.asmx

• ♣ DocuPro 80000 Package 119 (Jun 15, 2022): Download (See DocuPro.asmx/A

• ♣ DocuPro 80000 Package 121 (Lec 23, 2023) ♠ Upgrade PDF

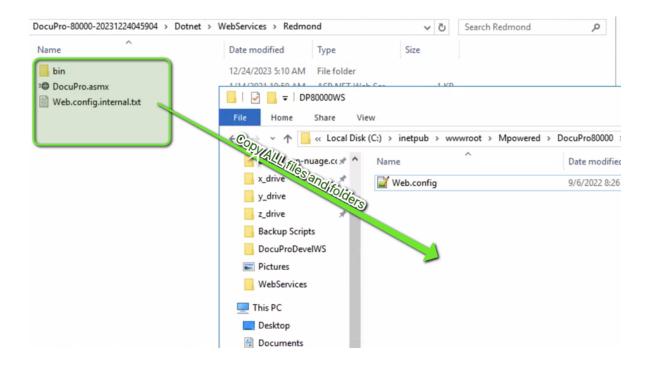
Download the zip package. There are no new grants required for this update, so the database does not need any modifications. Unzip the package into a location where you will be able to copy the files to your internal and external Test DocuPro websites. After unzipping, under the \Dotnet directory, you will find \Client and \WebServices directories.

Let's start with the \Client directory. On your <u>external</u> Test DocuPro website, delete all the files, **except Web.config**. Then copy All the files and directories from the \Client directory over to your external Test DocuPro website:



That's it for the client side.

Now for the \WebServices. On your <u>internal</u> Test DocuPro website, delete all the files, **except Web.config**. Then copy All the files from the \WebServices\Redmond directory over to your internal Test DocuPro website:



If you run your Test DocuPro now, you will see:

ERROR: appSetting(s) missing in Web.config: app-740.180, app-740.185, app-740.186, app-740.187 (in dp_procmain) []

This error is expected, because there are changes required to the Web.config to make it compatible with this update.

Once you have installed the update into Test

Getting started on making changes - required new Web.config keys

To start, we are going to add the four missing keys from the error message above. Copy the app-740.180, app-740.185, app-740.186, app-740.187 lines from the released Web.config.internal.txt file, and paste them in place after the app-740.170 key in your Web.config file like this:

```
<add key="app-740.160" value="Unfortunately, the file extension you chose is not accepted by our system. Our sy
<add key="app-740.170" value="Unfortunately, an error occurred while uploading your file. It may be that the fi
<add key="app-740.180" value="&lt;span class=&quot;dp-reqdocsdesc&quot;>&lt;br>Requested supporting documents:&
    <add key="app-740.185" value="&lt;a href=&quot;#&quot; class=&quot;add-reqdoc-btn btn btn-warning btn-default b
    <add key="app-740.186" value="&lt;a href=&quot;#&quot; class=&quot;btn btn-info btn-default btn-xs&quot; role=&
    <add key="app-740.187" value="&lt;div class=&quot;modal&quot; id=&quot;dp-rdmh-@@@RDMHID@@&quot;>&lt;div class=
```

<!-- THIS is the MAIN config setting for configuring which applications are available - the app-740.200 setting <!-- use AD_ConfigAndDatabaseTest AFTER EVERY CHANGE of this Web.config to make sure the app-740.200 informatio

These, and of course all of the configs we will be copying from the Web.config.internal.txt can be changed, if desired, to reflect your desired wording and styling. For now, leave them as is, so that after we're completed the steps in this guide, your screens will look and behave the same way as is shown in the screenshots.

Changes to page 040

To accommodate the new section on the 040 page, we need to modify some things here as well:

- 1. Copy the app-040.069A, app-040.069B, app-040.069C, app-040.069D, app-040.069E lines from the Web.config.internal.txt file, and paste them in place after your app-040.060 key. As part of these new lines, we are moving the start of the dp-attach-stage1 span from app-040.070 up to app-040.069A, so we also need to delete the text at the start of app-040.070 so that it starts with
Uploaded documents:< as shown in the screenshot above.
- 2. The app-040.250 key needs to have an additional div to display a possible file name change. Position your cursor right after the initial </form>
 in app-040.250 as shown here:

<add key="app-040.230" value="
<input type="s

Additional signout warning

The app-740.420 key needs to have an additional span added to allow a message if there are requested docs still outstanding. For this one, you will need to position your cursor at the end of the payment span in app-740.420, and before the uploads span as shown (this will be in a ways at around column 680-690). Make sure your cursor is located as shown:

and then paste this text there: Requested support document(s) 1 or more requested support documents may still be outstanding. Use the orange button to choose and upload your document. Do not leave the page until the progress bar indicates the upload succeeded, and you see your document listed in the "Uploaded documents" section. We will not be able to begin processing your @@@APPFLDR@@@ until we receive document(s).

Adding the "Requested documents" definitions

Next comes the definitions for which documents we will be requesting:

```
<add key="app-/40.264" Value="SID APPLICATION FEE $/5" /> <!-- The actual fee name as defined in Tempest -->
<add key="app-740.265" value="BURN PERMIT (LAKE COUNTRY)" /> <!-- the actual fee name as defined in Tempest -->
<!-- definitions of requested documents lists, the 740.200 settings above optionally will need a reference to configu
<!-- for example: appstngreqdocs=&quot;app-740.290,app-740.291&quot; where we are requesting doc configuration lists
<!-- sample landing page for WR's forms: https://www.whiterockcity.ca/171/Applications-Forms-Guidelines-->
<add key="app-740.290" value="&lt;root>&lt;xrefs>
   <x doc=&quot;Application Form&quot; help=&quot;Download a blank Application Form as a fillable PDF &amp;lt;a h
  <x.doc=&quot;Agent Authorization Form&quot; help=&quot;This document must be supplied if the registered proper
  <x doc=&quot;Title Search&quot; help=&quot;Obtain this document from the &amp;lt;a href=&amp;quot;https://ltsa

    %1t;x doc=%quot;Site Plan" help="Produced by a registered land surveyor, the purpose of the Site Plan i

%lt;/xrefs></root>" />
<add key="app-740.291" value="&lt;root>&lt;xrefs>
    <x-asof=&quot;20231206&quot; doc=&quot;Structural Drawings&quot; />
    <x-asof=&quot;20231206&quot; doc=&quot;Structural Schedule B&quot; />
   </xrefs>&lt;/root>" />
<!-- each setting in this group is required -->
<add key="app-740.300" value="Y" /> <!-- Y or N - add default tasks to folder -->
<add kev="app-740.310" value="Y" /> <!-- Y or N - add default conditions to folder -->
```

The key names for these should be tucked in somewhere before app-740.300. Copy the comments and app-740.290, app-740.291 lines from the Web.config.internal.txt file, and paste them in place before your app-740.300 key. Each of these keys defines a set of buttons, allowing you to mix and match which buttons go with which application. You may find that there is an overlap of which documents are needed for each application type, for example, maybe you want all applications to request an application form, and so a generic application form could be the only button in a key set.

The only required attribute of each "x" line is "doc". The doc attribute defines the name displayed on the orange button as well as becoming the ultimate uploaded file name and description, which we'll see in action below. If an optional "help" attribute is associated with the button, a help [?] button is displayed. Help text is displayed as a modal dialog, and can contain html, which is useful for things

like displaying links to download a form, to get more information, etc. The optional "asof" attribute allows you to specify a kind of go-live date for that particular button. The date must be in YYYYMMDD format, otherwise it is ignored. Any applications created by DocuPro on or after that date will display the buttons, so that applicants coming back to applications created earlier aren't confused by new buttons appearing on their applications.

Again, you will want to review all of the information in these samples once the update is completed, and modify them to suit your organization. We'll leave them as is for the moment after pasting them in, so that your screens match this document.

And now, for the icing

If we left our Web.config as it is now, nothing would change in our DocuPro screens. We need to add the key name or names we just created into our application definition(s) in app-740.200. You'll definitely have a different app-740.200 than is shown here, so you'll need to use a definition in your config; but here is an example for our "Plumbing Permit (WR)":

```
<add key="app-740.200" value="&lt;root>&lt;xrefs>
       <x dptype=&quot;BUILDING - Residential&quot; dpphone=&quot;604-897-7;
       <x dptype=&quot;BUILDING - Commercial&quot; dpphone=&quot;604-897-71;
       <x dptype=&quot;BUILDING - Industrial (allows no prop) &quot; dpphone=
      %1t:x dptype="BUILDING - Institutional (allows OOT) " dpphone=|
%1t:x dptype="BUILDING - Plumbing Permit (WR) | quot; dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (75) " dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (75) " dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (75) " dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (WR) | quot; dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (WR) | quot; dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (WR) | quot; dpphone="604-|
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%1t:x dptype="BUILDING - Test Permit (WR) | quot; dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (WR) | quot; dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (WR) | quot; dpphone="604-|
%1t:x dptype="BUILDING - Test Permit (WR) | quot; dpphone="604-|
%1t:x dptype=&qu
                                                                                                                                                             quot; appstngreqdocs="app-740.290,app-740.291" />
       <x dptype=&quot;LAND DEV - Tree Cutting Permit&quot; dpphone=&quot;60
       <x dptype=&quot;PAR - Burn Permit (Lake Country) &quot; dpphone=&quot
       <x dptype=&quot;PAR - CP Program Building Permit&quot; dpphone=&quot
       <x dptype=&quot;PAR - Electrical Permit&quot; dpphone=&quot;604-897-
       <x dptype=&quot;PAR - Mechanical Permit&quot; dpphone=&quot;604-897-
       <x dptype=&quot;PAR - Sign Permit&quot; dpphone=&quot;604-897-7112&qn
       <x dptype=&quot;PAR - House Plans Request&quot; dpphone=&quot;604-89
       &lt:x dptype=&quot:PAR - Address Change Request&quot: dpphone=&quot:604-
       <x dptype=&quot;FINANCE - Tax / Utility Pre Authorized Withdrawals&qu
       <x dptype=&quot;FINANCE - Water / Sewer Leak Adjustments&quot; dpphor
       <x dptype=&quot;FINANCE - Mailing Address Change&quot; dpphone=&quot
       <x dptype=&quot;FINANCE - Power of Attorney&quot; dpphone=&quot;604-8
       <x dptype=&quot;FINANCE - Special Meter Read&quot; dpphone=&quot;604-
       <x dptype=&quot;LICENCES - Business Licence&quot; dpphone=&quot;604-4
       &lt:x dptvpe=&quot:LICENCES - Dog Licence&quot: dpphone=&quot:604-897-7;
       &lt:/xrefs>&lt:/root>" />
```

We've added the appstngreqdocs="app-740.290,app-740.291" attribute at the end of the application definition line. This tells DocuPro that we want to display both the app-740.290 and app-740.291 button definitions. We could have any number of button definitions, and add them as a CSV list (no spaces). If we only wanted the buttons from app-740.290, then we would change the attribute to appstngreqdocs="app-740.290".

If there are any duplicates in "doc" attributes across button sets, DocuPro will only use the first definition it came across.

We're finished the changes to Web.config for now. Don't forget to do a quick check of your Web.config on https://elmah.io/tools/config-validator/ making sure you have 0 Errors and 0 Warnings.

We're ready to test it!

If you run your Test DocuPro now, you should see the footer reflect the 121 update:



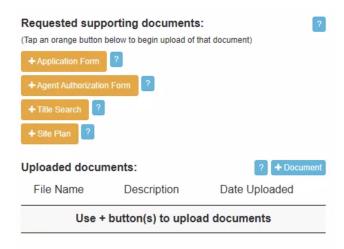
Create an application of the type you added the buttons to, and as long as today's date is on or after the asof date (if you specified one), you should see the "Requested supporting documents" section along with the buttons. We're in Test, so click buttons, and see how it works.

Usage notes

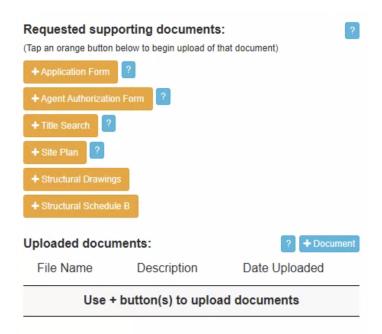
- The requested documents section follows the same rules as regular documents, i.e. the requested documents section will not be shown if document uploads are not allowed (a red "+ Document" button), based on the application settings:



- An application created before the asof date shown in app-740.291 above (does not show the "Structural Drawings" and "Structural Schedule B" buttons):



- An application created after the asof date shown in app-740.291 above (shows the "Structural Drawings" and "Structural Schedule B" buttons):



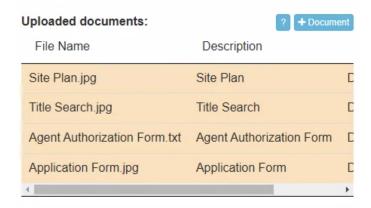
- after hitting an orange button, and selecting a file, the "File Description" field becomes read-only, and if the selected file does not match the button name exactly, a message is displayed "Note: Once uploaded...":



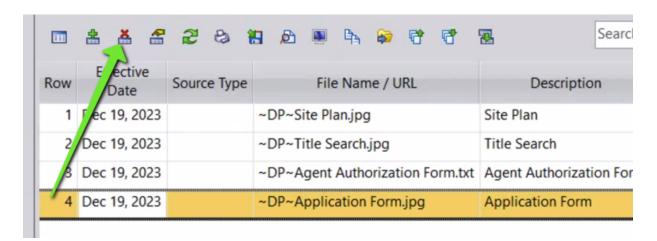
when the selected file matches the orange button name exactly, the message is not shown:



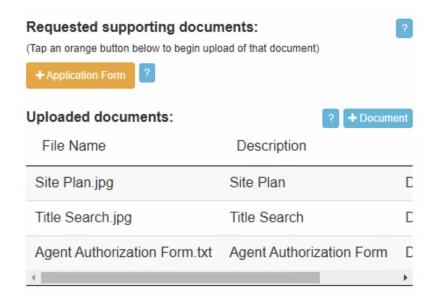
- once all the requested documents have been uploaded, the entire requested documents section is not shown any more:



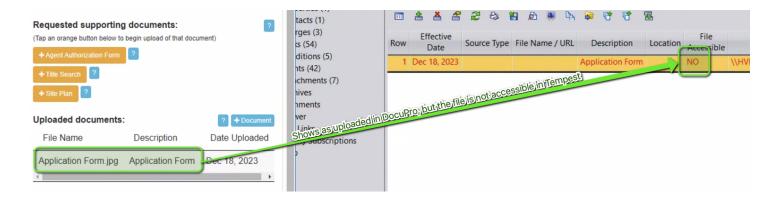
- if, for any reason, you need to have the applicant re-submit a required doc, you can delete that attachment in Tempest:



at which point, if the page is reloaded, the button returns and the applicant can be contacted to supply it again:



Technical note: As an application is being loaded for display, DocuPro examines the Tempest database attachments table to see if a requested document exists there - NOT whether the underlying file exists. So (because of the dual-sidedness of attachments - database record and corresponding file) it is possible to have a situation where an attachment file was uploaded, after which at some point the underlying file was deleted (via the file system), but the Tempest attachments table still contains the record for the upload. See this example:

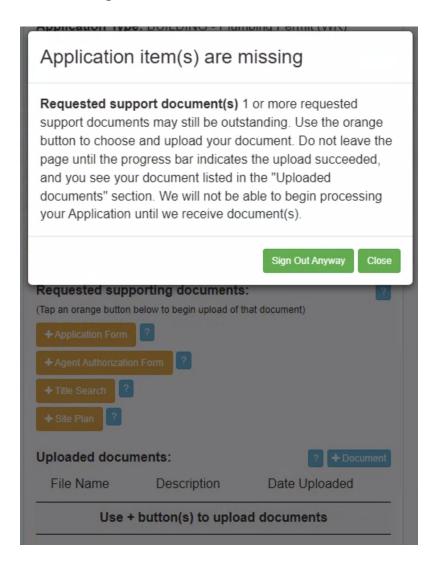


Here an Application Form was uploaded via DocuPro, but at some point the underlying file was deleted. When the application is later re-loaded, it still shows the Application Form in the Uploaded documents section of the web page because the record still exists in the Tempest attachments table. Tempest allows this situation, and although it can be rare, it is still a bit disconcerting. A programming choice had to be made as to where to look for uploads (either the attachments table or the underlying file system), and the attachments database table was chosen because it matches what the Applicant would expect.

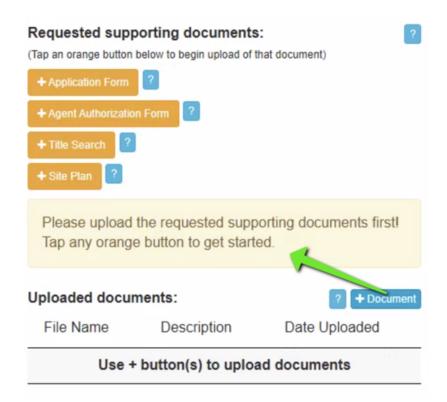
In the above example, if DocuPro looked at the <u>file system</u> for the Application Form, it would not find it, and if that method had been used, would show the Application Form orange button again to the Applicant - which would be confusing because they had already uploaded it.

If this scenario happens on one of your folders, and the underlying file cannot be recovered, it's probably best to delete the attachment record in Tempest. The orange button will appear again if the application is re-loaded. Then, contact the applicant to get them to add the upload again.

- on hitting the Home/Sign Out button with outstanding Requested support documents, an "Application item(s) are missing" dialog box is displayed. This message trumps the usual "no uploads found..." when 1 or more requested documents are still outstanding:



- if the "+ Document" button is hit while any orange buttons are still visible, a "Please upload the requested..." message is displayed for a few seconds:



The default released configuration of the app-040.069E key effectively makes any requested supporting docs as "required", because it will not allow documents to be uploaded using the blue "+ Document" button until all of the requested documents have been uploaded. If you want to change this behavior (this will apply to all application types), you can make a slight name change to the add-reqdocs-first id in app-040.069E key:

```
<add key="app-040.0690" value="&lt;div style=&quot;display:none, aquot;adu-requots-nerp
<add key="app-040.0690" value="&lt;div id=&quot;add-reqdocs-fir stz&cuot; style=&quot;dis
<add key="app-040.0696" value="&lt;div id=&quot;add-reqdocs-fir stz&cuot; style=&quot;dis
<add key="app-040.070" value="&lt;br>Uploaded documents:&lt;div style=&quot;float:right;
<add key="app-040.073" value="&lt;div class=&quot:modal&quot: id=&quot:add-attach-na&quo</a>
```

In the example above, a "z" was added to the id name, and now because the id does not match what is expected in the JavaScript, the blue "+ Document" button will function even if there are outstanding requested documents. Don't forget to reload the page to test this.

Going forward

Now, you will need to modify the Web.config to your liking. Decide on which button sets to create, where there may be overlaps, and which application types they should be shown on. Also, review the wording of the new keys added or modified in this update.

After you have made your changes, and tested everything, you should be able to perform the upgrade on Live (using a similar

"delete-everything-except-the-Web.config-file and then copy the new files" process as we did for Test), and then just copy the Test Web.config over to Live. Make sure you do a little bit of smoke testing in Live to make sure that applications are loading, etc.

Any questions? Please contact us at info@mpowered.biz or marc@mpowered.biz