



Upgrading to Roundtable TSMS 9.1D and Progress Dynamics Integration

This document briefly describes the process of upgrading Roundtable 9.1D to work with the new Dynamics and Roundtable Integration which has been revised and updated by Tugboat Software.

The integration between Roundtable and Dynamics is based on a new patch release, 9.1D05, of Roundtable as well as a new set of integration code, which replaces any existing integration code previously used.

The add-on pack described in this document is valid for Dynamics versions 2.1A03 and 2.1B.

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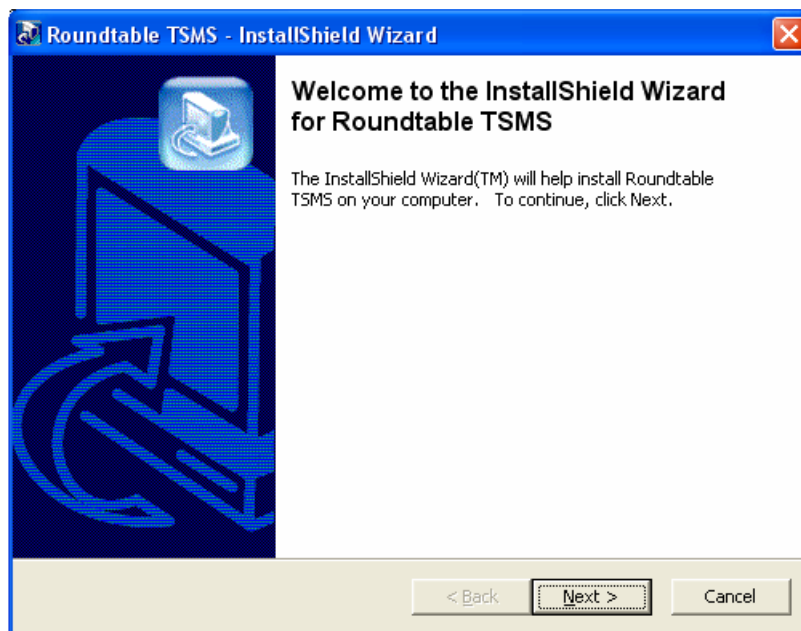
1.1 Roundtable 9.1D

If Roundtable 9.1D has not yet been installed, then any existing repositories previously using 9.1C or earlier must be upgraded to 9.1D with the latest patch – 9.1D05. This will make some minor changes to the schema of the repository.

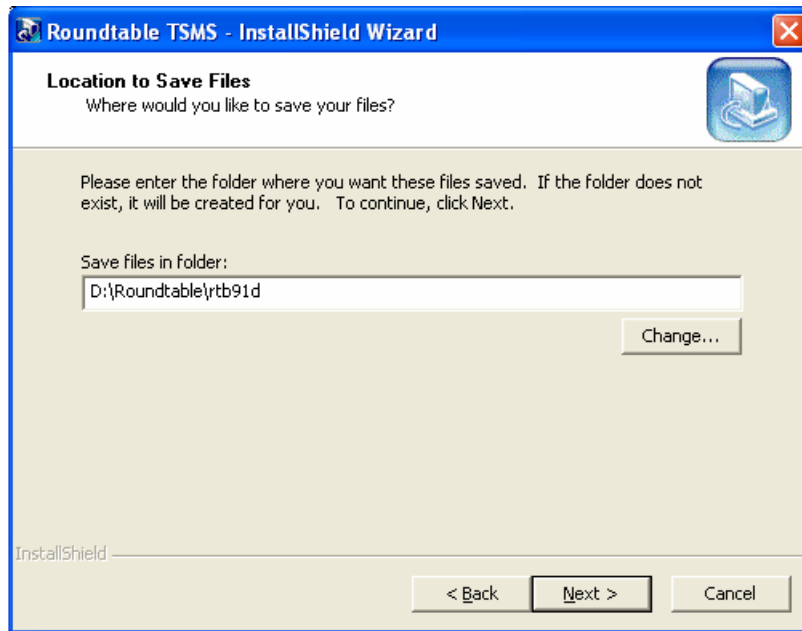
It is possible to continue using 9.1C against this repository. All that is required is that the 9.1C client is recompiled against the updated repository.

1.2 Installing 9.1D05

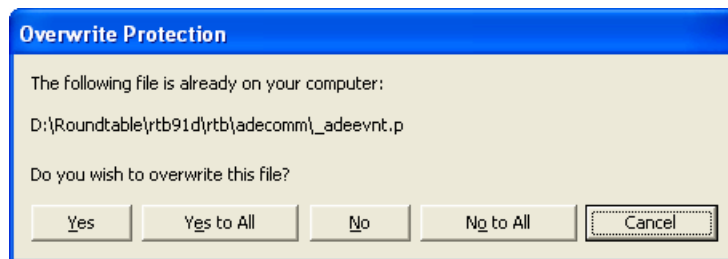
Once 9.1D is installed, the patch for 9.1D05 must be installed. This is installed like all other Roundtable patches.

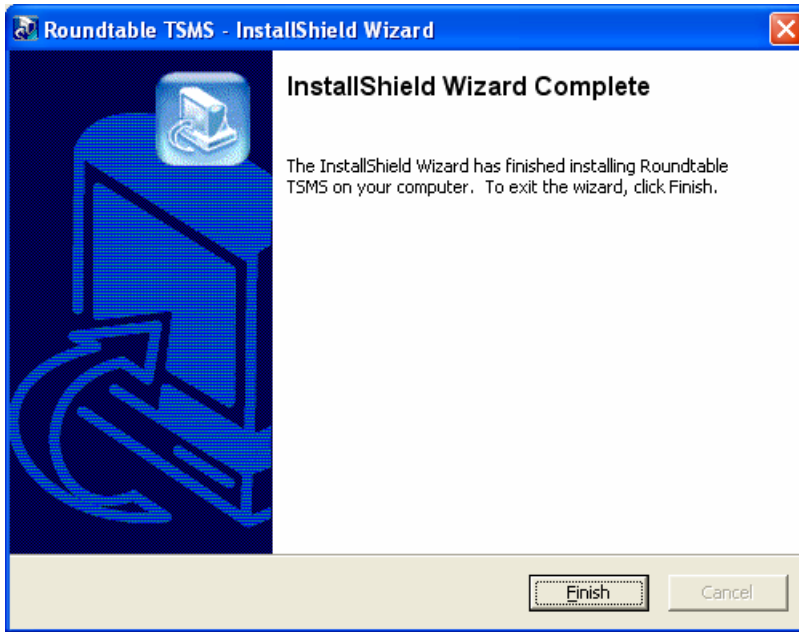


Choose the correct install directory for Roundtable 9.1D.

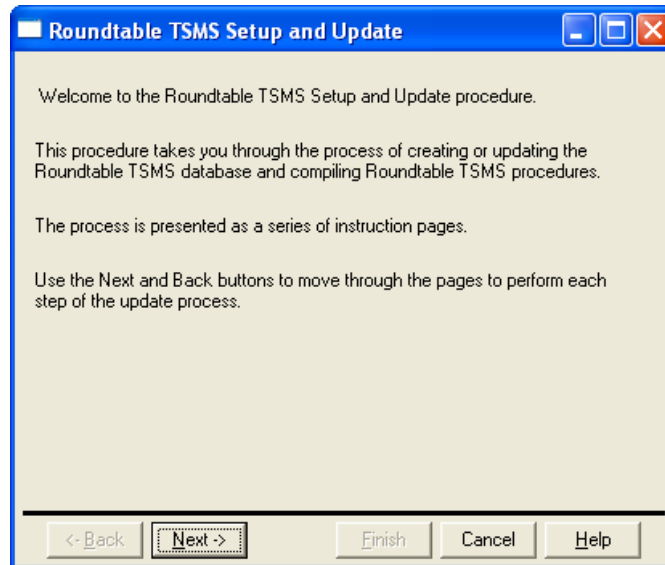


Make sure that all existing files are overwritten.

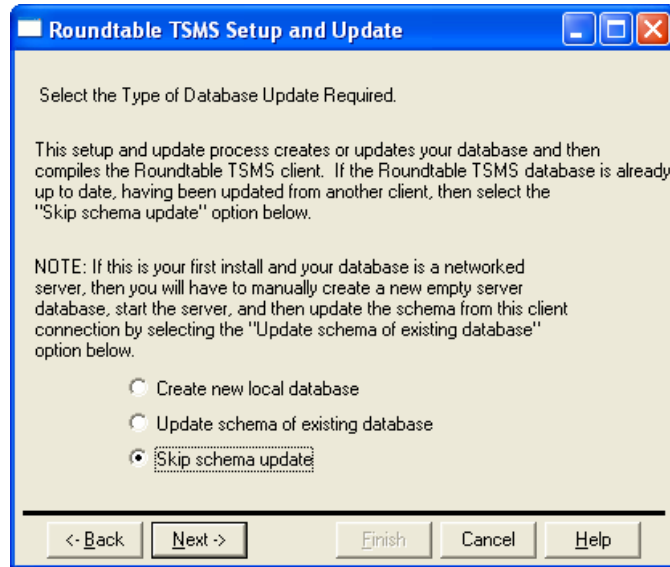




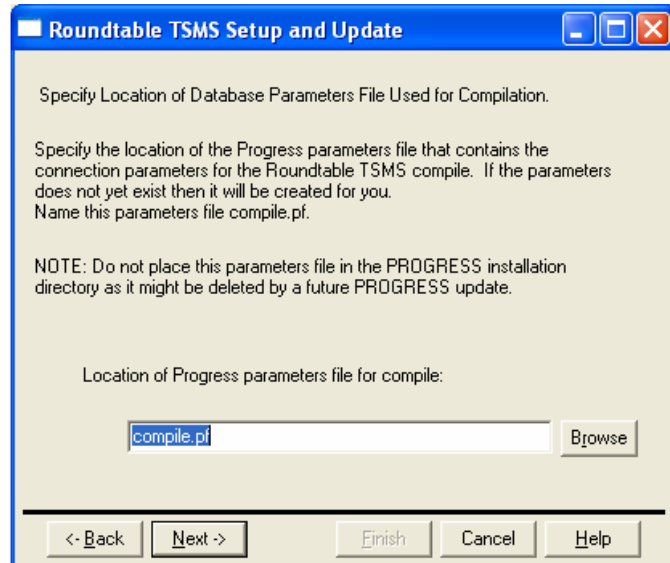
Once the InstallShield install has been completed, run the Roundtable Setup to compile the updated code.

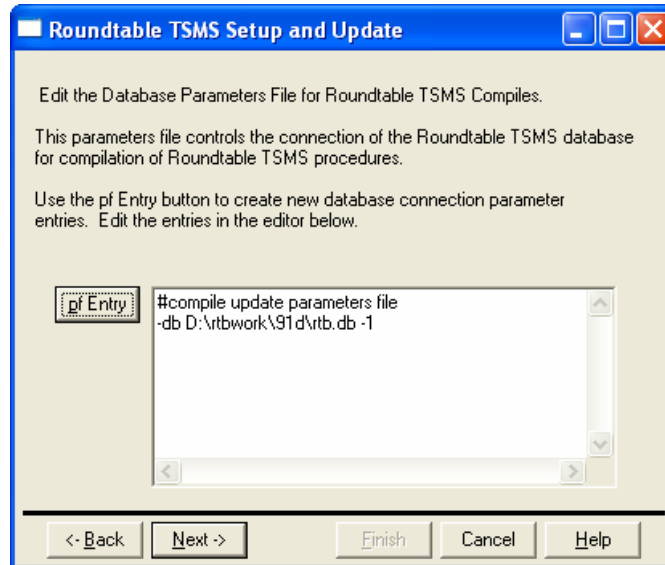


As there are no schema changes for this patch, the schema updates can be skipped.

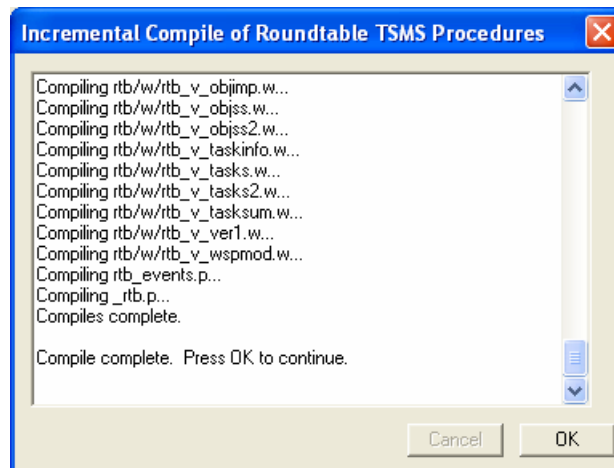
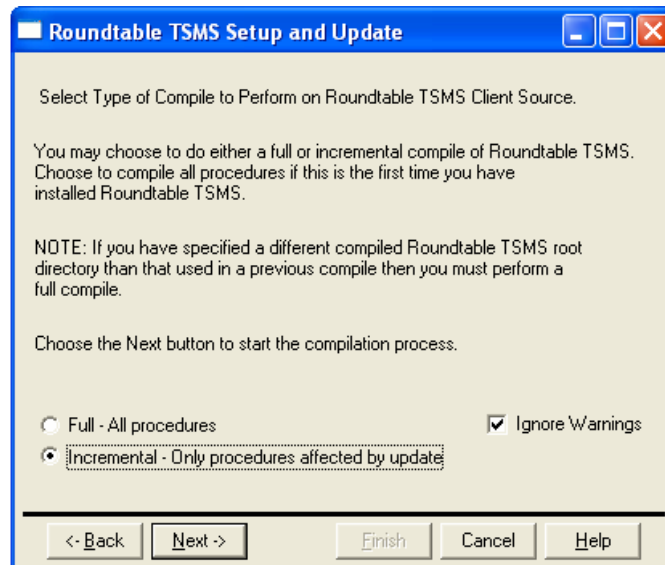


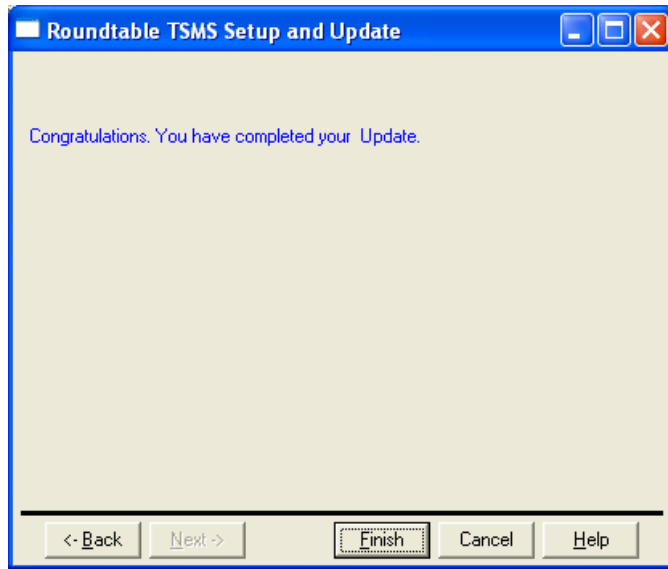
Re-use the compile .pf file from previous updates.





Select an incremental compile of the RTB client.





1.3 Installing the Roundtable and Dynamics Add-On

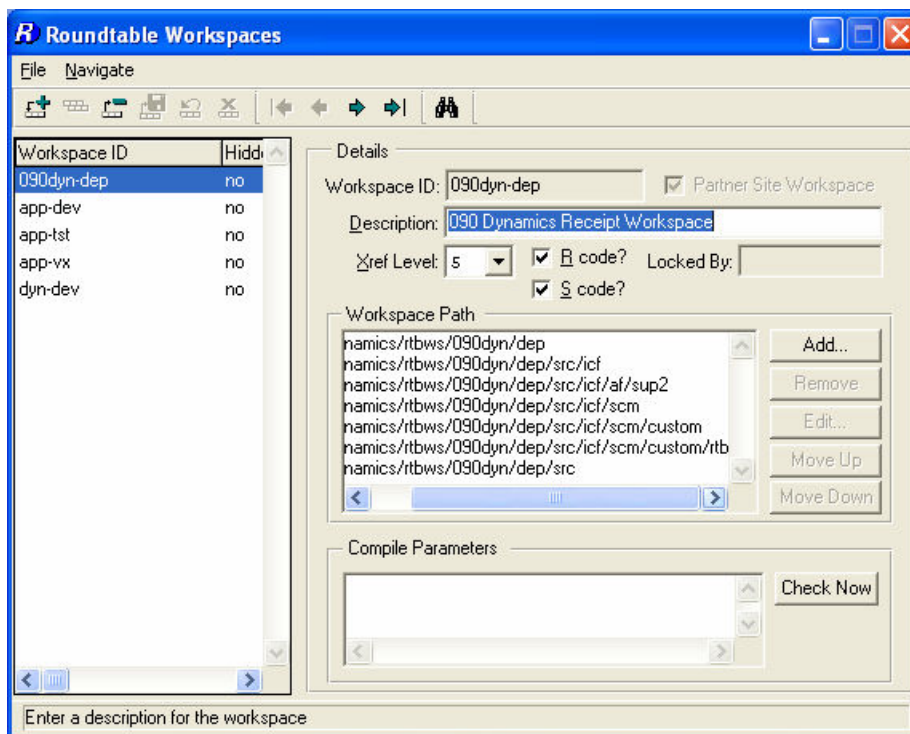
Once this part of the setup is completed, the Roundtable installation is ready to be updated with the new generic Dynamics and Roundtable integration. The main differences between the earlier integration code is that it has been updated to make use of the new event handler and API changes that are part of the 9.1D architecture of Roundtable.

In addition the integration code is now provided as an add-on to the Roundtable client and not as part of the Progress Dynamics framework. This means that a standard version of the integration code can be used for multiple workspaces with a simpler workspace setup than before. If there is a need to maintain customizations to the integration, this is still possible in the same way as has been the case previously by maintaining custom variants of the integration code as part of the application workspaces.

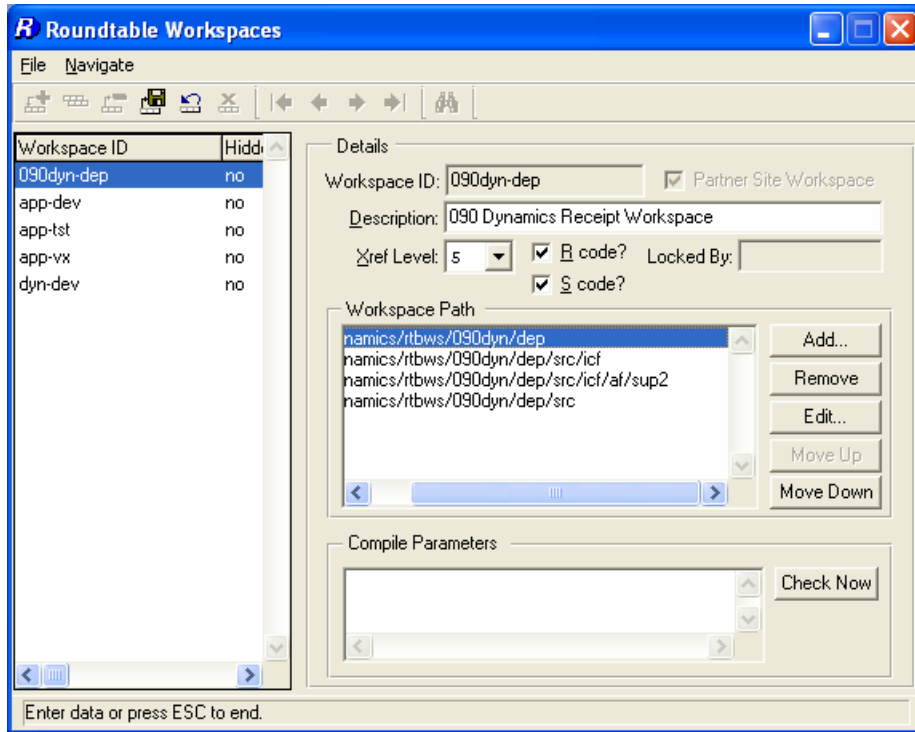
1.3.1 Changes to existing workspaces using Dynamics and Roundtable

Unless it is necessary to maintain customizations of the integration code, the workspace paths can now be simplified.

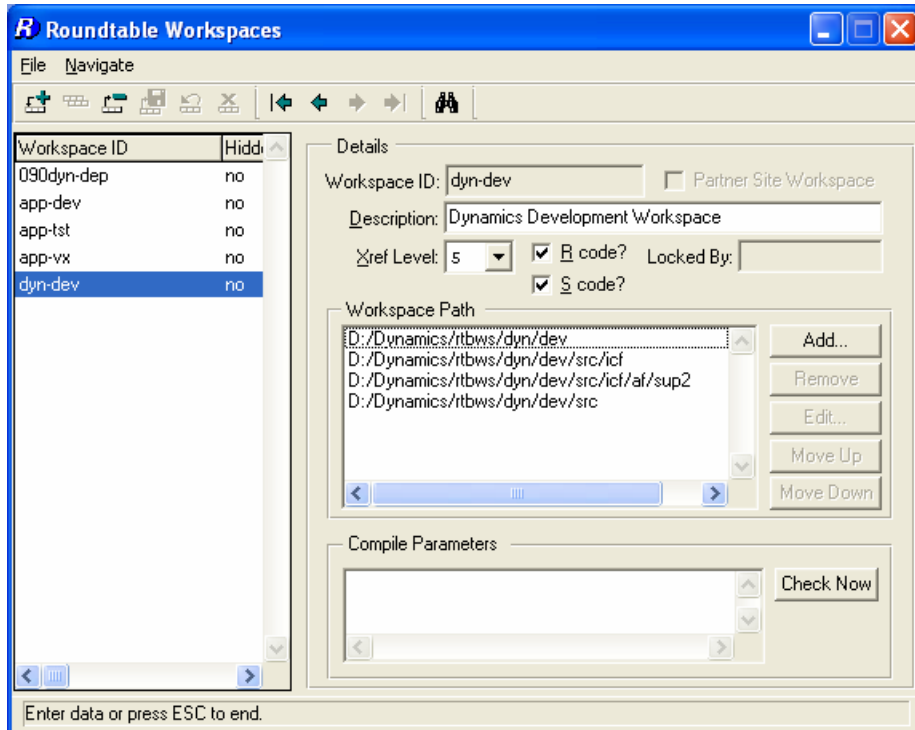
The “scm” directories that have been needed until now can be removed completely from each of the workspaces.

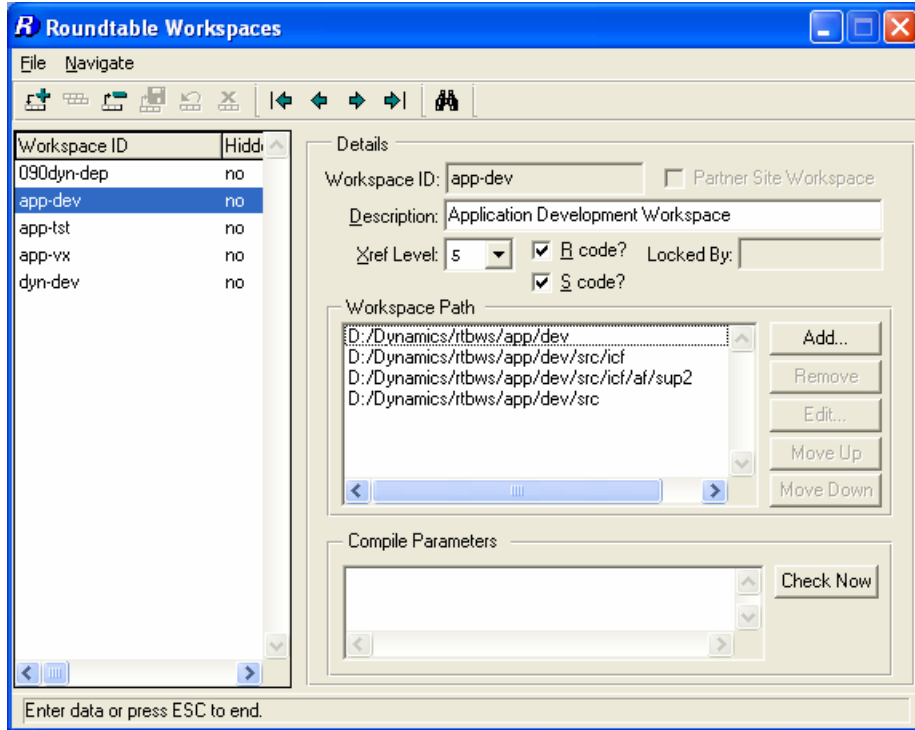


This makes the workspace paths simpler.



Do this for all workspaces which are to use a standard version of the Dynamics and Roundtable integration.

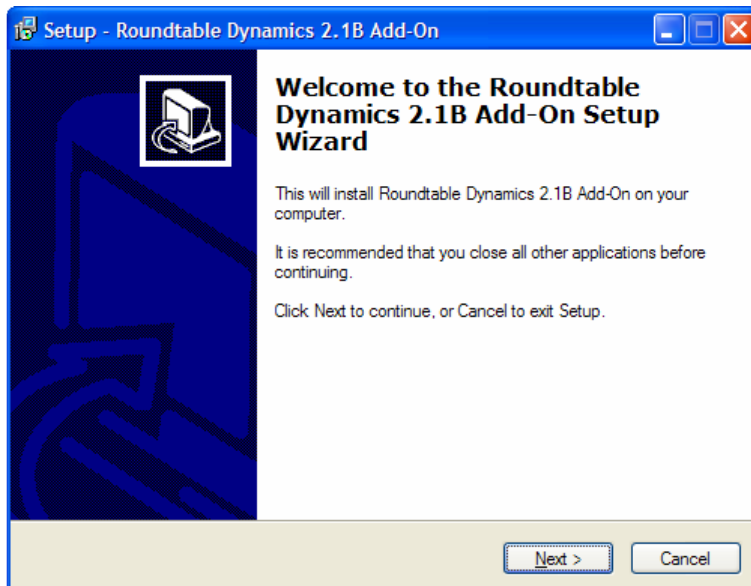




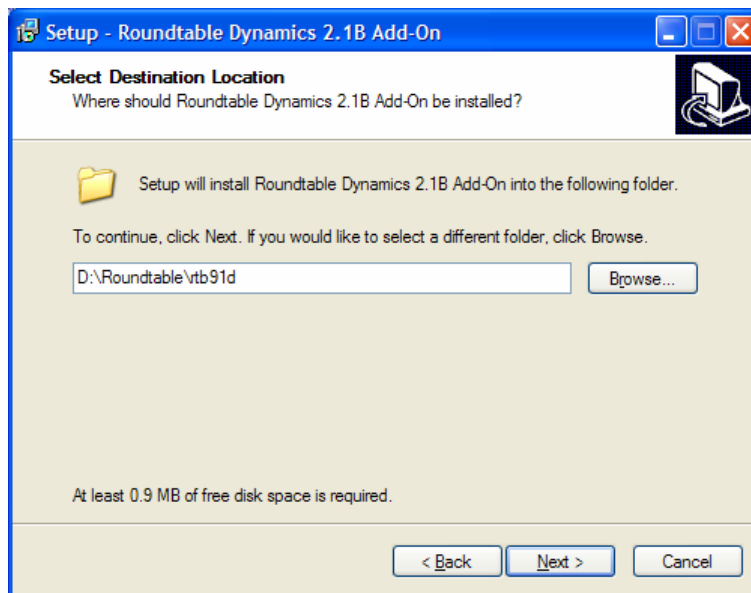
1.3.2 Installing the add-on

The installation process is the same for a new install or an install to replace a previous installation of the add-on package. Unless otherwise stated, the add-on package can therefore be installed directly on top of an existing installation.

1. Start the installer downloaded from the Roundtable website (www.roundtable-tsms.com) and press **next** to continue.

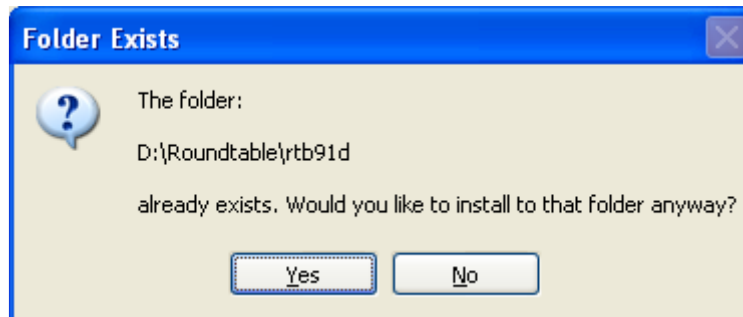


2. Select the correct install directory for the existing Roundtable 9.1D installation. Press **Next**.

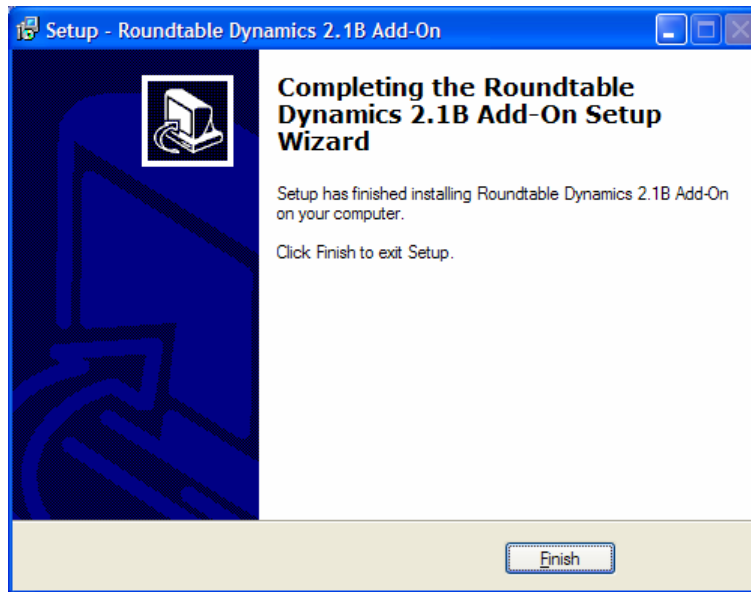


If the default directory for the installation package is not correct for the root of the Roundtable client, select the correct installation directory before continuing.

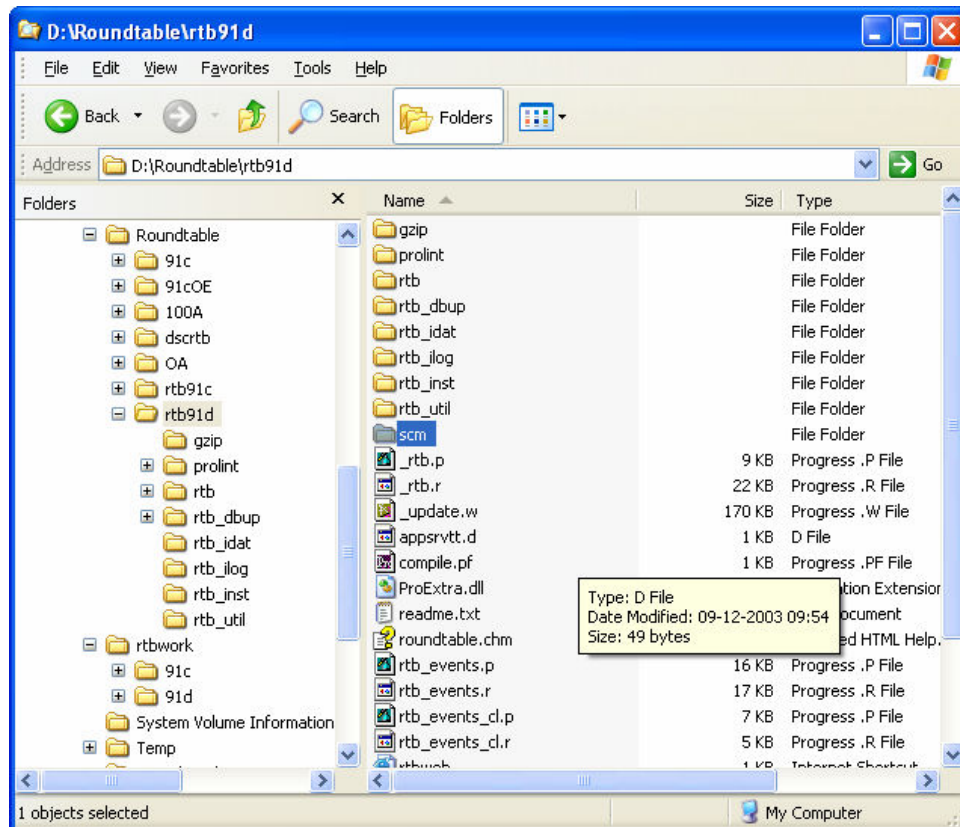
3. Select **Yes** to continue with the installation.



4. Press **Finish** to complete the installation.

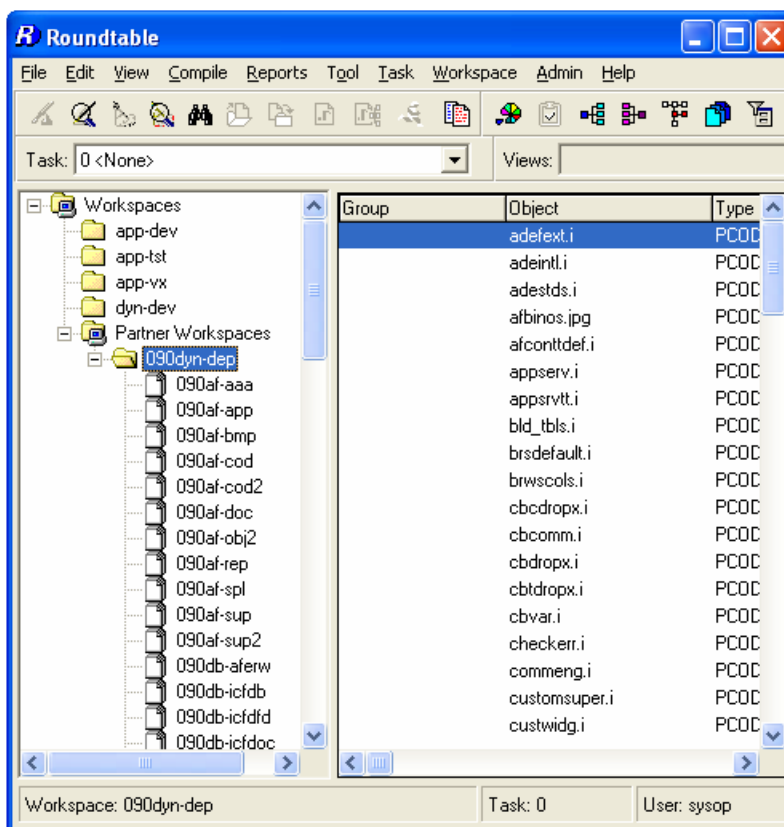


The extracted files are all contained in a subdirectory named “scm” in the root of the Roundtable client directory.

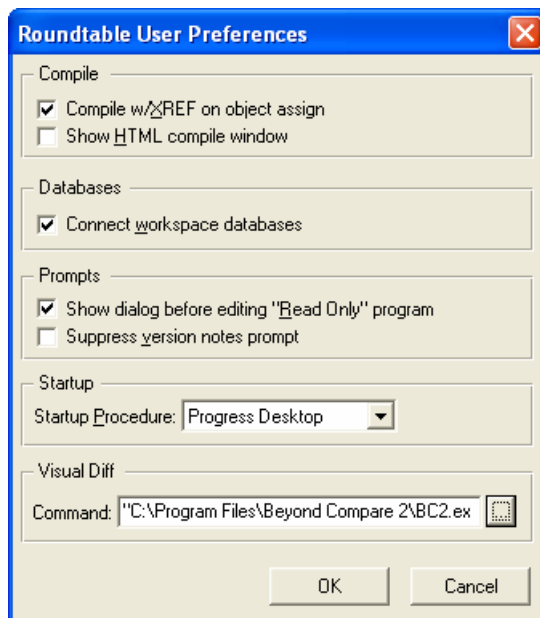


The new integration code is not provided as a Roundtable deployment. Instead the code will have to be compiled from a Roundtable session with a workspace selected that is connected to a Dynamics ICFDB database.

Start the updated RTB client and select a valid workspace with an ICFDB database connected.



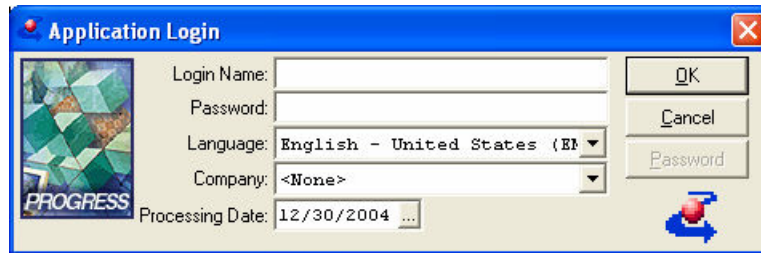
Remember to have the user preferences set to connect to the workspace databases.



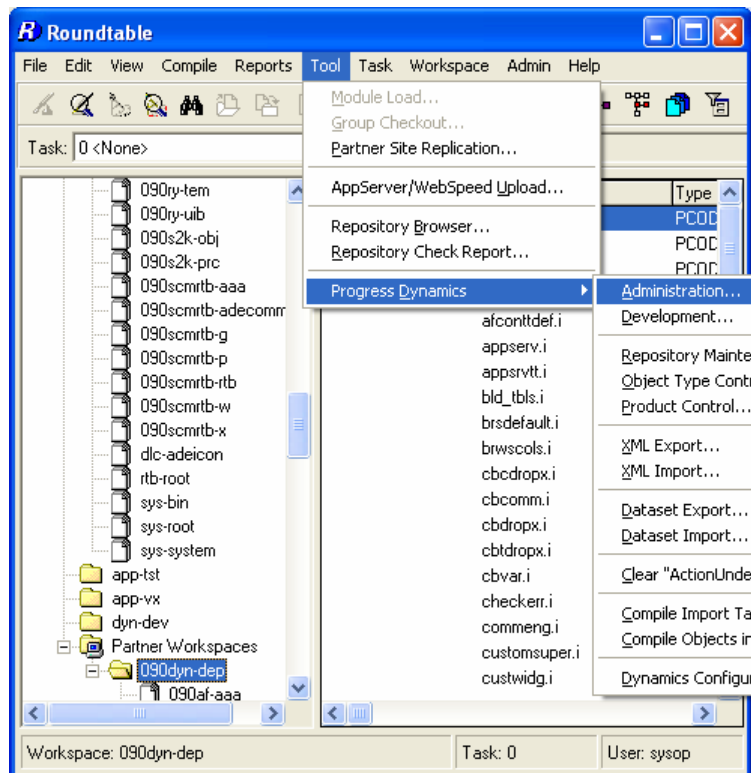
Start a Procedure Editor and run the following command.

```
RUN scm_compile.p.
```

This will compile the integration code located in the <roundtable install>\scm directory. Once this is done, re-selecting the workspace should give a log in to the Dynamics environment.



Check that the extra tool menu item for Dynamics is created as it should be.



This completes the installation of the new Roundtable and Dynamics integration.

1.4 Technical Support

If there are issues with the setup and install of the new Roundtable and Dynamics Integration, Roundtable Technical Support can be contacted at support-europe@roundtable-tsms.com.