

# iMarkup Server v6 – Upgrade Notes

*This is intended for users upgrading from the iMarkup Server v5*

The iMarkup Server v6 contains many new features, including a new workflow GUI and navigation system. The iMarkup Server v6 installation will automatically upgrade your existing installation.

## ***iMarkup Server v6 Highlights***

- 100% HTML workflow GUI with drag-and-drop builder and graphical workflow monitor;
- A new navigation system with expandable folder tree;
- New interface with sizable and sort-able columns;
- Multiple eForm “viewers” can be used to view a single instance of data;
- Current eForm can be controlled in the workflow process;
- eForm enhancements now reduce the need for system TAGs;
- Custom eForm and Workflow Tasks provide the ability to create custom functions that provide easy to use eForm field mappings and custom workflow tasks;
- Improved Knowledge View reporting and displays;
- Support for assignment of users' manager in workflows when due dates expire;
- Improved performance;
- plus many other new features and improvements...

**To upgrade to iMarkup Server v6, perform the upgrade using the link below:**

[http://imarkup.com/install/server/iMarkupServer\\_upgrade.exe](http://imarkup.com/install/server/iMarkupServer_upgrade.exe)

## ***Before the Upgrade to v6!***

It is recommended that you backup your entire database.

## ***After the Upgrade from v5!***

The upgrade process will convert the necessary data in your v5 server. After the upgrade completes here are some of the immediate differences you will notice:

- A new navigation system is presented on the left side of the browser;
- The workflow builder is now a graphical interface;
- The custom scripting events have been changed;

To **ensure compatibility** with the v6 release, review these steps after the upgrade:

- Export your workflows and eForms to an XML file that is stored on your PC before updating your workflow or eForm definitions using the new builders.
- It is recommended to do a check-out-and-edit of all eForms after the upgrade to take advantage of the new preprocessing features. Additionally, the %IMK\_EVENT\_FIELDS()% TAG has been retired and is now configured from the eForm properties page.
- The new workflow GUI will render all of your existing workflows in a graphical format. It is recommended that you open each of your workflow definitions and reposition all of the steps on the graphical palette. The layout will be maintained after saving the workflow definition.
- Custom EFORM Scripting Changes:
  - The eForm *INIT*, *PRE* and *POST* scripts have been combined into a single script. If you are using different ASP script pages for these on any eForms, combine the scripts into a single ASP file and reconfigure the eForm properties page to point to the new script. Refer to the scripting guide for a sample of how to create a scripting structure for your custom ASP file.
  - You must move the code in your the *PRE* script handler to a subroutine or function named *FormPre()*;
  - You must move the code in your the *POST* script handler to a subroutine or function named *FormPost()*;
  - The *formAPIType* variable is no longer used to determine the state, the scripts are now called by the invocation of a specific function name, if you have script code that is executed on entry of the ASP page this must be moved into a function and called by the *FormPre()* or *FormPost()* functions.
  - The eForm *INIT* event is no longer called;

## ***Installing iMarkup Plug-in v3.9x***

If you are using the iMarkup plug-in features (e.g. eForm Builder, Graphical Annotations, etc.), install the plug-in for the iMarkup Server v6 by using the link below:

<http://imarkup.com/install/plugin/imarkupplugininstall.exe>