

Upgrading the InSite Creative Workflow software

Note: (Integrated system only) Make sure the version of the integrated InSite Prepress Portal is 11.5, and make sure you run the ICU utility on the integrated InSite Prepress Portal server prior to running the installer of the InSite Creative Workflow.

1. Log on to the Creative Workflow server using the ARAXI account. Do not perform the upgrade using a Remote Desktop connection.
2. If you have not downloaded the TwAm_11.5.0.###.zip file already, download the file now and save the file to the J: drive on your Creative Workflow server (e.g. j:\ICWStuff folder).
3. Extract the TwAm_11.5.0.###.zip file to the j:\ICWStuff folder.
4. In the J:\ICWStuff folder, open the TwAm_11.5.0.###/TwAm folder and double-click setup.exe.
The InSite TwAm Installer launches and then a warning message about the license key requirement appears.
5. Click **OK**.
The InSite TwAm Installer wizard appears.
6. Click **Next**.
The InSite Creative Workflow and IIS services stop.
7. On the NT User Account screen, type the password (generally ARAXI). Type it again to confirm it.
Click **Next**.
8. On the Summary screen, click **Next**.
The installer updates the software on your system.
Notes: The process is expected to take about 20 minutes depending on the system. During the process, the Installer wizard interface may show "*..(Not Responding)*" state. That is normal. The installation/upgrade processes are healthily happening behind the scene. Please leave the state and wait; DO NOT abort the installation/upgrade process by force-quitting the installer wizard.
9. The ICCU wizard appears.
10. On the Welcome screen, click **Next**.
11. On the Configuration Scenario screen, select whether you are configuring a standalone or integrated InSite Creative Workflow server, and click **Next**.
12. On the Administrative Credentials screen, perform the following actions:
 - a. Type the password for the ARAXI account.
If the system is integrated with a Prepress Portal server, the user name and password must match the user name and password for the INSITE service on the Prepress Portal server and the ARAXI service on the Prinergy server.
 - b. If you have moved the server to a domain, select the **Domain Account** check box, and type the account name in the format: <DOMAIN>\<account user>.
 - c. Click **Next**.
13. (Integrated system only) On the Prinergy Primary server Information screen, type Primary Server Name and Primary Server IP Address, and click **Next**.
14. (Integrated system only) On the ICU Run Confirmation screen, if you have run the ICU on the InSite Prepress Portal server, select **Yes, I have run the ICU utility on the InSite Prepress Portal Server**, and click **Continue**. If you have not run the ICU on the InSite Prepress Portal server, run it now, then select **Yes, I have run the ICU utility on the InSite Prepress Portal Server**, and click **Continue**.

15. On the DMZ Mode screen:

- If the system is integrated, click **Next**.
Note: In an integrated system, the Prepress Portal server can be in a DMZ environment, but the InSite Creative Workflow server cannot.
- If the system is standalone, and if you are putting the server in a DMZ environment, select the **Run InSite Creative Server in DMZ mode** check box, and click **Next**.
- If you are not putting the server in a DMZ environment or if you plan to set up the DMZ environment later, click **Next** without selecting the check box.

16. (System with tertiary server only) On the Tertiary Server screen, the server that you have configured for storing projects and libraries (other than the InSite Creative Workflow server) is listed. Type the IP address of the tertiary server, select the file access protocol, and click **Next**.

If you do not have a tertiary server, this screen does not appear.

17. (Distribution server configuration only) On the Distribution Servers screen, any distribution servers that you have installed and configured (other than the InSite Creative Workflow server) are listed. Select the name of each distribution server, type its IP address, and click **Next**.

If you do not have any distribution servers, this screen does not appear.

18. On the ICW Data Model Information screen:

- If the system is standalone and you want to install the ICW Data Model on a Prinergy server:
 - a. Select the **EnableICW Data Model** check box.
 - b. Type the Prinergy Server Name and IP Address.
 - c. Check Use SSL encryption if needed.
 - d. Click **Next**.
- If the system is integrated and you want to install the ICW Data Model on the Prinergy server:
 - a. Select the **Enable ICW Data Model** check box.
Note: Prinergy Server Name and IP Address are retrieved from the previous step and they cannot be changed in this step.
 - b. Check Use SSL encryption if needed.
 - c. Click **Next**.

You can leave the check boxes cleared if you are not installing ICW RBA Data Model to any Prinergy server or if you plan to install it later.

19. On the Email Relay Server screen:

- If the system is standalone:
 - If you are using an email relay server other than Microsoft email relay server:
 - a. Check **Default Email Service** checkbox.
 - b. Enter the IP address or a Fully Qualified Domain Name (FQDN) of the e-mail relay server
 - If you are using Authenticated SMTP through Office 365:
 - a. Check **Authenticated SMTP** checkbox.
 - b. Enter the Microsoft email relay server name. It could be smtp.office365.com, but it could also be another server, for example, <yourdomain>.mail.protection.outlook.com might be your mailserver. Please consult your Microsoft 365 Admin Center for more information.
 - c. In the **Email Account** field, enter one email address in your Microsoft 365 tenant authorized to send mail.

- d. In the **Password** field, enter the password for the Email Account.
 - e. In the **HTTP Proxy** field, if your site is using a proxy for your servers to access the World Wide Web, enter the proxy's URL. Consult your IT department to see if a proxy is being used.
 - f. In the **HTTP Proxy Port** field, enter the port number that the HTTP proxy will accept requests on. Consult your IT department to obtain the information.
 - If you are using OAuth2:

Important: In order to select this option, you need to complete the prerequisites for OAuth2 integration in article KA28816 on Customer Portal

 - a. Check **OAuth2 (Office 365 only)** checkbox.
 - b. In the **Tenant Id** field, enter Tenant Id.
 - c. In the **From Email Account** field, enter the email address that you want to use as the sender's email address

Note: The email address must already exist in your tenant.
 - d. In the **Client Id** field, enter Client Id.
 - e. In the **Client Secret** field, enter Client Secret.
 - f. In the **HTTP Proxy** field, if your site is using a proxy for your servers to access the World Wide Web, enter the proxy's URL. Consult your IT department to see if a proxy is being used.
 - g. In the **HTTP Proxy Port** field, enter the port number that the HTTP proxy will accept requests on. Consult your IT department to obtain the information.
 - If the system is integrated, all the information should be copied from ICU on the integrated IPP server. Make sure all the information is correct.
20. Click **Next**.
 21. On the Configuration Summary screen, check that all the actions that you want the ICCU to perform are listed, and click **Apply**.
The configuration starts and a progress bar shows the status.
 22. (Integrated system only) When the configuration is complete, you will be requested to restart the **InSite** service on the Prepress Portal server. In the restart message that appears, click **OK**. Restart the **InSite** service on the Prepress Portal server as requested in the message.
 23. When the configuration is complete, click **Diagnostics**.
 24. On the Diagnostics screen, click **Finish**.
 25. On the Configuration Results screen, check that all the steps display a status of Done, and click **Done**.
If a step displays a status of Failed, record the error message, and then continue with the upgrade. When the upgrade is finished, contact your service representative for help diagnosing the problem. You cannot start the InSite Creative Workflow system until the problem is resolved.
 26. Click **Finish**.
 27. Click **Yes, I want to restart my computer now**, and then click **Finish**.
The server restarts.