

Installation and Deployment

HOPEX V5



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HOPEX Application Server (HAS)

Architecture Overview

1. Foreword	4
1.1. What is HAS?	4
1.2. What is HOPEX Store?	4
2. Logical Application Architecture	5
2.1. HAS Server	5
2.2. HAS Modules	6
2.3. HAS Instance Manager	9
2.4. HAS Bundle	11
2.5. HAS Installer	11
3. Software Technology Stack	12
3.1. Overview	12
3.2. Web Client	13
3.3. IIS Web Server	13
3.4. HAS Web Application Server	13
3.5. Database SQL Server	13
4. Communications and Protocols	14
4.1. Overview	14
4.2. Detailed protocols and ports needed	15
5. Logical Infrastructure	18
5.1. Deployment overview	18
5.2. Deployment type: decision tree	19
5.3. Scaling the infrastructure	20
5.4. Cluster deployment	20
6. Sizing Physical Infrastructure	23
6.1. Disclaimer	23
6.2. Hardware sizing	24
7. SQL Server Databases	28
7.1. How many databases	28
7.2. Database size	28
7.3. Database options	29
7.4. User account and privileges	29
7.5. Physical backup	31
7.6. Administrative tasks	31
8. Security	32
8.1. Windows Users and Groups	32
8.2. HAS Self-signed certificate	32
8.3. Running processes	32
8.4. Antivirus	33
8.5. Firewall	33
8.6. User Authentication	33
8.7. Data Access	34
8.8. Cookie security policy	35
9. File Server	37
10. Supervision and monitoring	38

11. Error and trace log files	39
12. Miscellaneous.....	41
12.1. Licensing	41
12.2. Full search and indexing	41
12.3. Mail system.....	41
12.4. Multi-language	41
12.5. Reporting	42
13. Other Technical Documentation	43
14. Frequently Asked Questions (FAQ)	44

1. Foreword

The document describes the Logical Architecture and Infrastructure Architecture for the HOPEX Platform.

This document applies to HOPEX Application Server (HAS) Architecture deployment from HOPEX V5 onward. Check if a more recent version of this document is available via the online MEGA Community.

Other related documentations are available, see Other Technical Documentation.

The physical infrastructures provided in this document may be subjected to adjustments based on specific contexts. A specific study from MEGA R&D teams might be required.

1.1. What is HAS?

HAS stands for: **HOPEX Application Server**. HAS is the web platform that **runs**, **administrates** and **deploy** all solutions of MEGA, including **HOPEX**.

HAS is the Architecture deployment mode for HOPEX V5 onward.

1.2. What is HOPEX Store?

MEGA HOPEX Store is the online website that allows to download all the required components to install and deploy the HOPEX solutions.

The store is available here: <https://store.mega.com>

An **installation key** is required to proceed with the installation process. Please refer to your sales representative to get your installation key.

2. Logical Application Architecture

2.1. HAS Server

HOPEX Application Server, shortly named "HAS", is based on a 3-tier web architecture principle including:

- a presentation tier: representing the web user interface. This layer is packaged as a **Front-end** module of web type. There might be several web front-end modules depending on the use case.
- an application tier: representing the business logic of the HOPEX platform. This layer is packaged as a **Back-end** module. The main module for the platform is called **HOPEX Core**.
- a Data tier: representing the persistence mechanisms of the data. This layer is provided by a market RDBMS.

As web application, the HOPEX solutions can be navigated using modern web browsers. The device used to browse the solutions depends on the Front-End module used and its compatibility with laptops, tablets, and mobiles.

The overall architecture of HAS is described in the following architecture view:

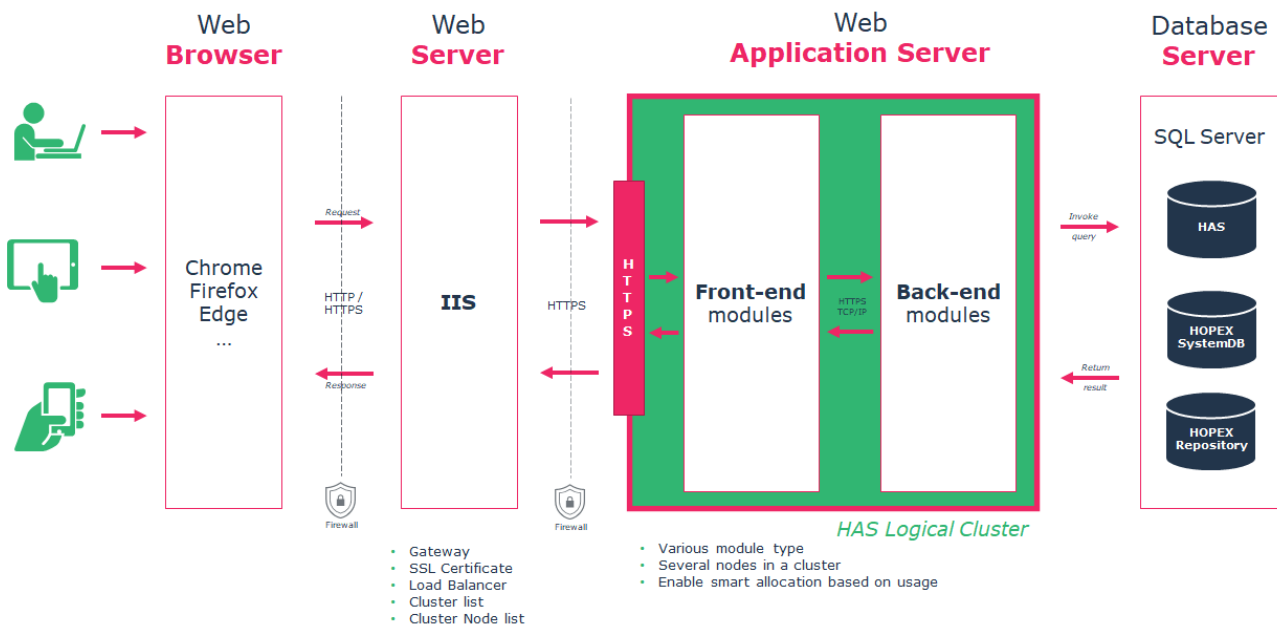


Figure 1 HAS Architecture Overview

The Web HOPEX Application Server provides its own web server based on **Kestrel ASP.Net Core**

The technical name of HAS as a Windows process is **HAS.server.exe**.

2.2. HAS Modules

2.2.1. Module overview

The embedded application web server is organized to work with a group of modules that deliver technical or business services.

Technical Classification	Purposes
System	These modules are the required system modules for the service to be up and running. They include authentication, clustering, monitoring...
Back-end	These are the modules that perform all the business logics and interact with the database to store information. These modules are called by the front-end modules.
Front-end	These are the modules that expose web front-end part. After identification, these modules can be accessed by the user web interface or by API.

HAS embeds all the modules in its web architecture. It will manage:

- Start/Stop: to Start or Stop the required modules and ensure the application is up and running.
- Restart: to avoid failover HAS manages the restart of the appropriate modules.

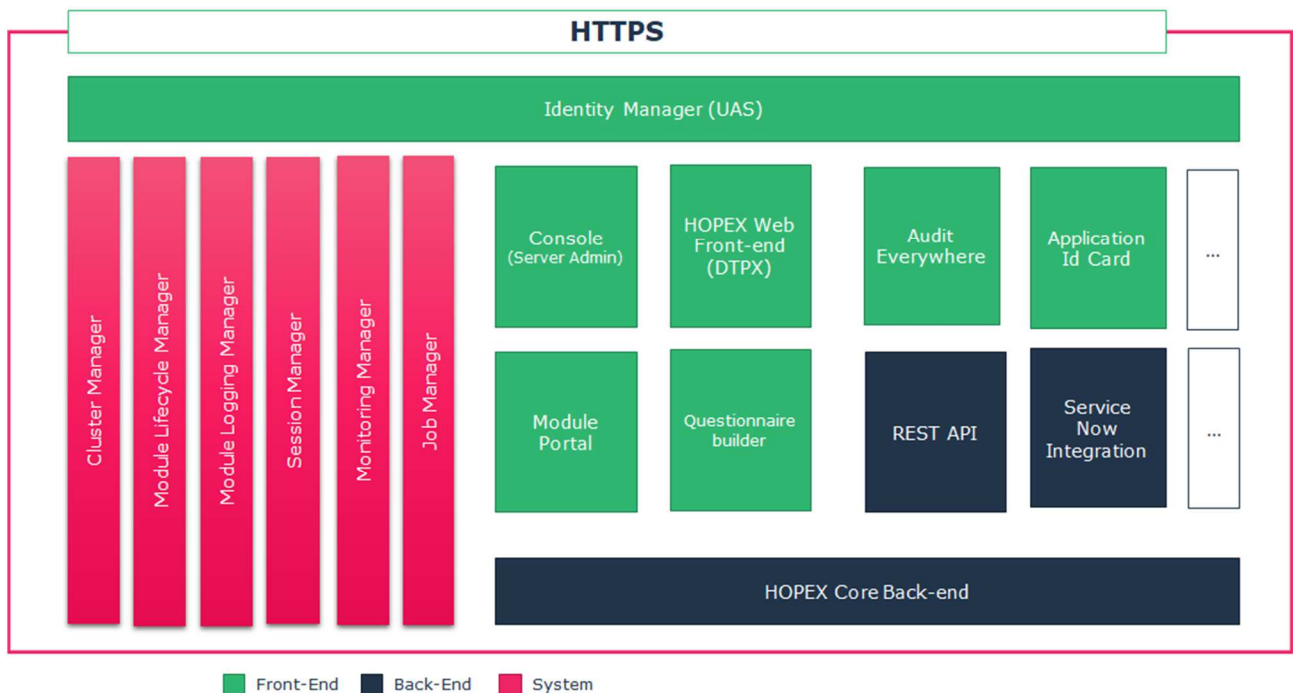


Figure 2 HAS Modules Overview

2.2.2. System modules

These modules are technical and are a prerequisite for the application to run. They can appear as dedicated modules or as part of HAS Server.

Module	Process Name	Purposes
Identity Manager	HAS.Modules.UAS.exe	Based on Identity Server 4 this module manages the authentication workflow. This module can be configured to support various SSO configurations.
Console	HAS.Modules.Console.exe	It allows to manage the server installation from a web portal.
Cluster Manager	HAS.Server.exe	Ensures the synchronization of the physical installation across the logical cluster.
Job Manager	HAS.Server.exe	Ensures the treatment of the scheduled jobs and their execution in the appropriate node of the cluster.
Lifecycle Manager	HAS.Server.exe	Enables updates of the modules based on available version from the HOPEX Store.
Session Manager	HAS.Server.exe	Ensures the opening and closing of the session when people request an HOPEX connection.
Monitoring Manager	HAS.Server.exe	Exposes supervision metrics to diagnostic health of the deployment.
Logging Manager	HAS.Server.exe	Provides the appropriate logs for each module with consistent naming convention and content.

2.2.3. Back-end modules

These modules expose the core treatment of the platform and can access a database to store data.

Module	Process Name	Purposes
HOPEX Core	HAS.Hopex.BackEnd.exe	This is the main process to run all the business logic of HOPEX.
...

All the other Back-end modules are available online on the HOPEX Store.

2.2.4. Front-end modules

These modules expose a web front-end and can be called by the user to access the platform.

Module	Process Name	Purposes
HOPEX Web	HAS.Modules.Dtpx.exe	This is the main process to expose the web front-end of HOPEX.
...

Other Front-End modules like Application ID Card, Audit Everywhere... are available online on the store and can be installed on an HAS Instance.

2.3. HAS Instance Manager

When deploying the solution, a Windows service named “**HAS Instance Manager**” is created. It handles:

- Fail-over: HAS Instance Manager start/restart HAS instance.
- Remote control: to request **start**, **stop**, **restart**, and even **update** from a web or through REST API.

The HAS Instance Manager embeds its own web server to expose a web front and REST API to perform the mentioned actions.

Moreover, with HOPEX Application Server it is possible to manage multiple instances on the same physical infrastructure. In that case the HAS Instance Manager ensures that all the HAS instances are up and running.

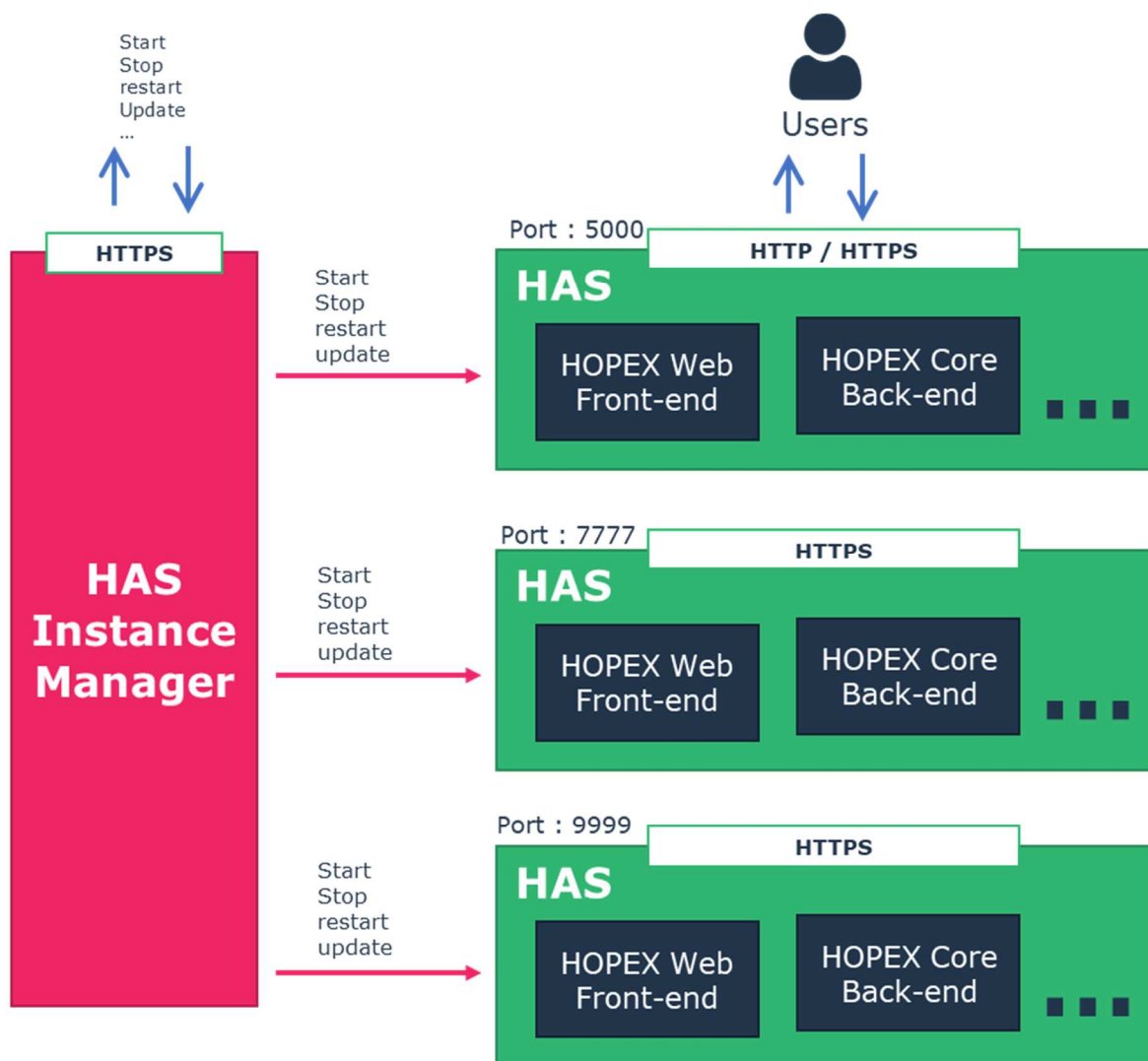


Figure 3 HAS Instance Manager Overview

2.3.1. Use case of Multiple HAS instance

In some situations, you may want to have multiple instances of HOPEX Application Server on the same server. The major use cases are:

- Multiple HOPEX environments: to manage in a different way the lifecycle of the database environments (SystemDb) and HOPEX customizations.
- Development, Pre-production, Production on the same server for small deployments to reduce infrastructure cost.
- SaaS multi-tenant deployment proposed by MEGA International.

Each instance is launched by HAS Instance Manager and is executed with the same user account.

2.3.2. Security

HAS Instance Manager must not be available from the web. It must be used in local host mode only.

2.4. HAS Bundle

A **HAS Bundle** is a collection of modules that represent a given version. For instance, you can find the following bundles: V5, V6, V7...

Each bundle contains:

- a version of the HAS Server
- a version of the HAS Instance Manager
- a collection of system Back-end and Front-end modules: HOPEX Core, HOPEX Web...

After the bundle installation, the modules can be updated individually regardless of the initial bundle.

2.5. HAS Installer

The installer is an **executable** program that eases the installation and deployment of the different components.

The component is built in **.Net Framework 4.6** which is by default installed in recent Windows server operating systems without prerequisites. This executable embeds an **MSI** setup built with **WIX**.

The installation process can be scripted with PowerShell script to ease deployment across several servers. The installer can be downloaded from the [HOPEX Store](#). The installer supports 2 modes for different use cases:

- Online installation

When going through the installation steps, the installer will download from the online store the needed modules.

- Offline installation

At some point in the installation process, the installer will create an offline package to continue the installation in a server that does not have access to the Internet.

2.5.1. Limited internet access?

To benefit from the best experience, when using HAS, we recommend you to allow access from the server to the <https://store.mega.com>.

We understand that in some context HAS might be installed in a secured network area where internet is not available.

In that situation you will need to use the offline installation procedure and download required modules and update prior to install them on the server.

3. Software Technology Stack

3.1. Overview

For each layer of the architecture to operate, a set of technologies and software are required.

Layer	Technology Stack
Web Client	<ul style="list-style-type: none"> Web Browser: Google Chrome, Mozilla Firefox ESR, MS Edge Chromium PDF Reader (optional) Microsoft Word (optional): https://www.microsoft.com/en-us/microsoft-365/microsoft-office Microsoft Excel (optional): https://www.microsoft.com/en-us/microsoft-365/microsoft-office
IIS Web Server	<ul style="list-style-type: none"> Windows Server 2016, 2019 (recommended), 2022⁽²⁾ Microsoft Internet Information Service (IIS) 10 Application Request Routing (ARR): https://www.iis.net/downloads/microsoft/application-request-routing URL Rewrite 2.1 https://www.iis.net/downloads/microsoft/url-rewrite SSL Certificate
HAS Web Application Server	<ul style="list-style-type: none"> Web Browser (Chrome, Firefox, Edge) Windows Server 2016, 2019 (recommended), 2022⁽²⁾ .Net 6 Hosting Bundle: https://dotnet.microsoft.com/download/dotnet/6.0 .Net Framework 4.8: https://dotnet.microsoft.com/download/dotnet-framework Visual C++ Redistributable 2015 – 2022 vc_redist.x64.exe https://support.microsoft.com/en-us/help/2977003/the-latest-supported-visual-c-downloads Windows File System ODBC Driver for SQL Server X64⁽¹⁾: https://docs.microsoft.com/en-us/sql/connect/odbc/download-odbc-driver-for-sql-server?view=sql-server-ver15
Database SQL Server	<ul style="list-style-type: none"> SQL Server 2019 or SQL Server 2022 https://www.microsoft.com/en-us/sql-server

⁽¹⁾ If SQL server is installed on the same server as HAS the client may be already installed

⁽²⁾ Starting for HOPEX V5 CP4 onward

3.2. Web Client

A **minimum 1360 x 768 laptop/screen resolution** is recommended for optimal rendering of HOPEX Web Front-End.

For the web browser the requirements are:

- HTML5 support
- JavaScript enabled
- Cookies enabled
- Download of files enabled
- Pop-up blocker disabled
- Web storage enabled

3.3. IIS Web Server

We use the Web server to behave as a **public Website face** to increase security and increase flexibility. Moreover, we use IIS with ARR as a **load balancer** across the HAS Logical cluster.

The IIS components: HTTP errors, Static Content Compression, HTTP Logging, Tracing and URL Rewrite are required on this server with complementary ARR component.

You must create your own HTTPS / SSL Certificate for the “public” DNS domain.

3.4. HAS Web Application Server

The mentioned software technologies above, must be installed on each HAS Server. HAS Servers work with a **self-signed certificate** for **internal communication**. Please refer to chapter 8 Security for more details.

3.5. Database SQL Server

Ensure that the database Collation is set to **SQL_Latin1_General_CP1_CI_AS**.

4. Communications and Protocols

4.1. Overview

The elements that compose the architecture interact with each other's using:

- HTTP(S) for all web interaction and across server's interaction.
- Socket IP across the modules **within the same server**

The High-level communication stack is summarized by the following schema:

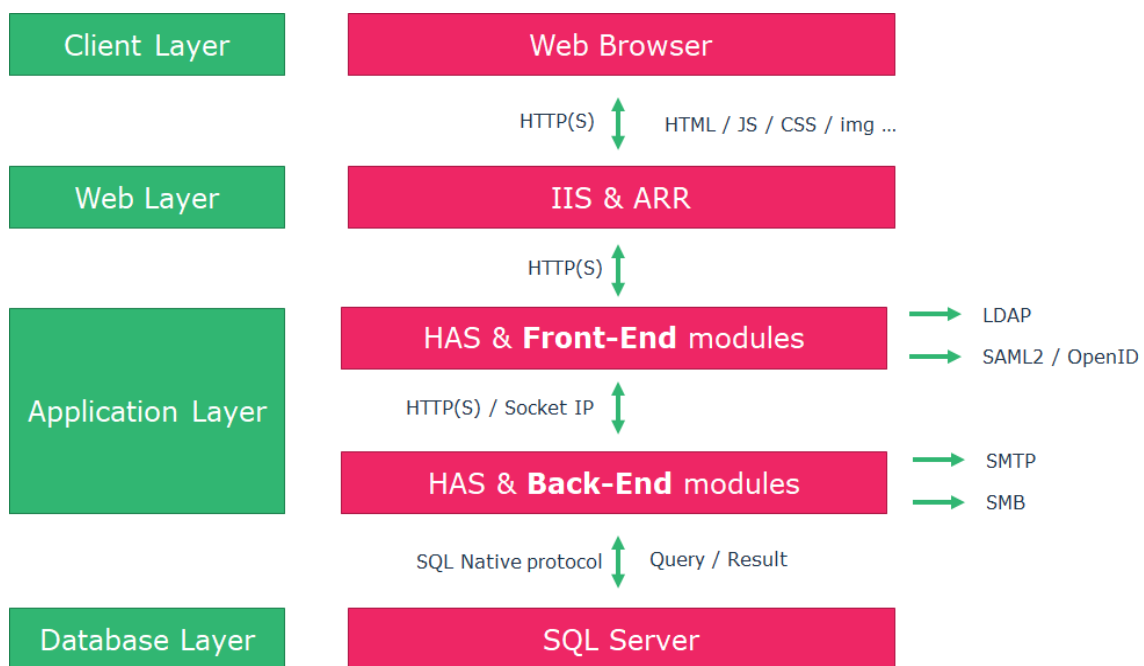
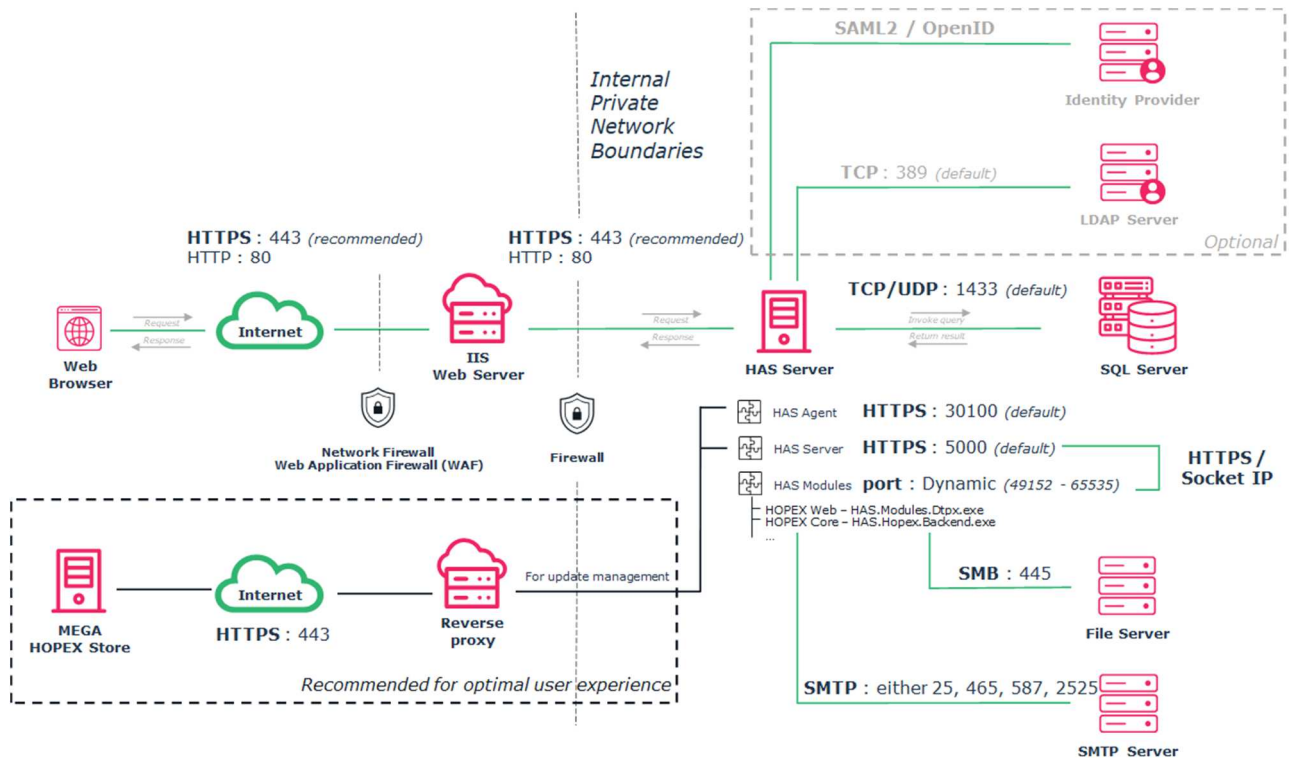


Figure 4 HAS Communication Stack

The full schema of communications and protocols used is shown below:



4.2. Detailed protocols and ports needed

4.2.1. List of ports

	Protocol	Port ⁽¹⁾	Network Bandwidth ⁽²⁾	Latency ⁽²⁾
Web browser	HTTP HTTPS	80 443 (recommended)	60 kbits/s average 512 kbits/s peak	100Ms
IIS Web Server	HTTP HTTPS	80 443 (recommended)	1 Gbit/s	
HAS Instance Manager	HTTPS	30100 (To be opened in cluster deployment)	1 Gbit/s	
HAS Server	HTTPS	5000 (to be opened if IIS is on another server or If cluster deployment)	1 Gbit/s	
HAS Modules⁽³⁾	HTTPS	49152 – 65535 (Internal port - not to be opened)	1 Gbit/s	

	Protocol	Port ⁽¹⁾	Network Bandwidth ⁽²⁾	Latency ⁽²⁾
HAS Module HOPEX Back-End⁽³⁾	Socket IP	49152 – 65535 (Internal port - not to be opened)	1 Gbit/s	1 Ms
File Server	SMB	445	1 Gbit/s	1 Ms
SQL Server (Native client)	TCP/UDP	1433	1 Gbit/s	1 Ms
SMTP Server	SMTP	25, 465, 587, 2525	1 Gbit/s	1 Ms
LDAP Server	TCP	389		
HOPEX Store https://Store.mega.com	HTTPS	443	1 Gbit/s	
HOPEX Back-End to subsystl.com⁽⁴⁾	HTTP	80		

⁽¹⁾ Port number may vary depending on IT policies. Given values are the default one.

⁽²⁾ Recommended values for optimal performance

⁽³⁾ The **Dynamic port range** used between HAS Server and the module is used only **within the Server** (localhost). No communication across servers is done with this port range. For more information: <https://support.microsoft.com/en-us/help/929851/the-default-dynamic-port-range-for-tcp-ip-has-changed-in-windows-vista>

⁽⁴⁾ One of the components embedded in HOPEX invoke subsystl.com to retrieve 4 bytes from this site for license validation and expected to take a fraction of a second. Not needed since V5CP5 HF16, V5CP6 HF6 , V5CP7.

4.2.2. Communication flow for each port

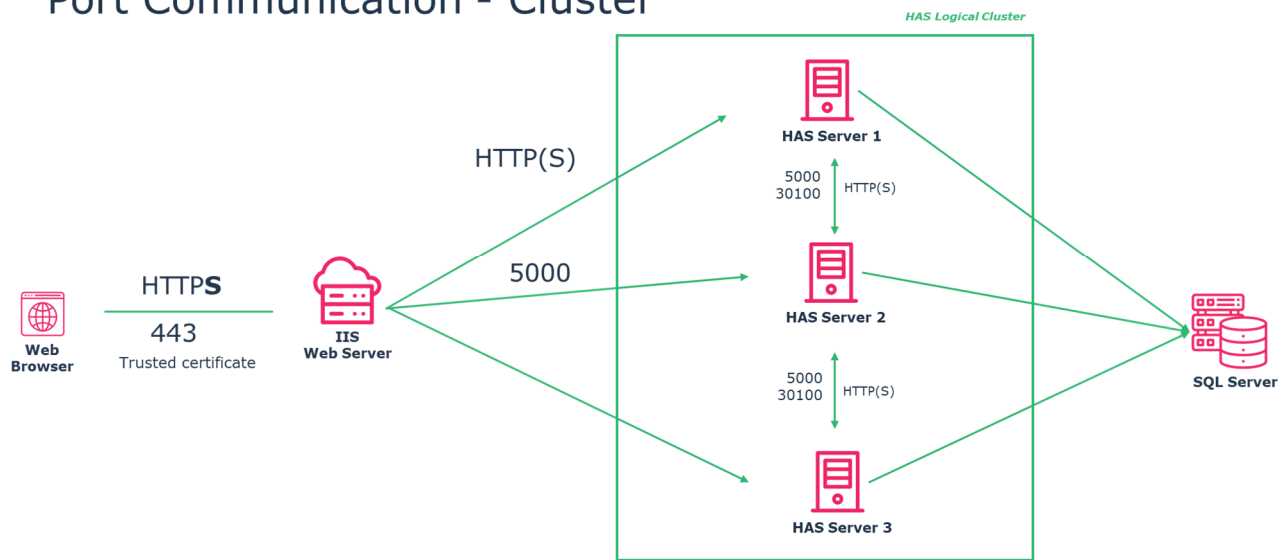
Here is the port used between servers:

Server source	Port	Server target
Web Browser	80 or 443	IIS
IIS	5000	HAS Server
HAS Server (internal calls)	49152 – 65535 (Windows Dynamic port range)	HAS Server (internal calls)
HAS Server 1 (Cluster node)	30100 5000	HAS Server 2 (Cluster node)
HAS Server ... (Cluster node)	30100 5000	HAS Server ... (Cluster node)
HAS Server	1433	SQL Server
HAS Server	445	File Server
HAS Server	25	SMTP Server
HAS Server	389	LDAP Server
HAS Server	443	HOPEX Store

Server source	Port	Server target
HAS Server	443	IIS

For cluster deployment apply the rule for each node of the cluster :

Port Communication - Cluster



5. Logical Infrastructure

5.1. Deployment overview

The elements of the application architecture can be deployed in various ways. The appropriate infrastructure depends on:

- Pre-existing infrastructure: IIS servers or Databases servers
 1. Security constraints
 2. Business continuity and disaster recovery plan, based on application business criticality.
 3. Production, Pre-production, Training, or Developments environments requirements.
 4. Number of concurrent users.

The required infrastructure can go from a single server to a farm of servers.

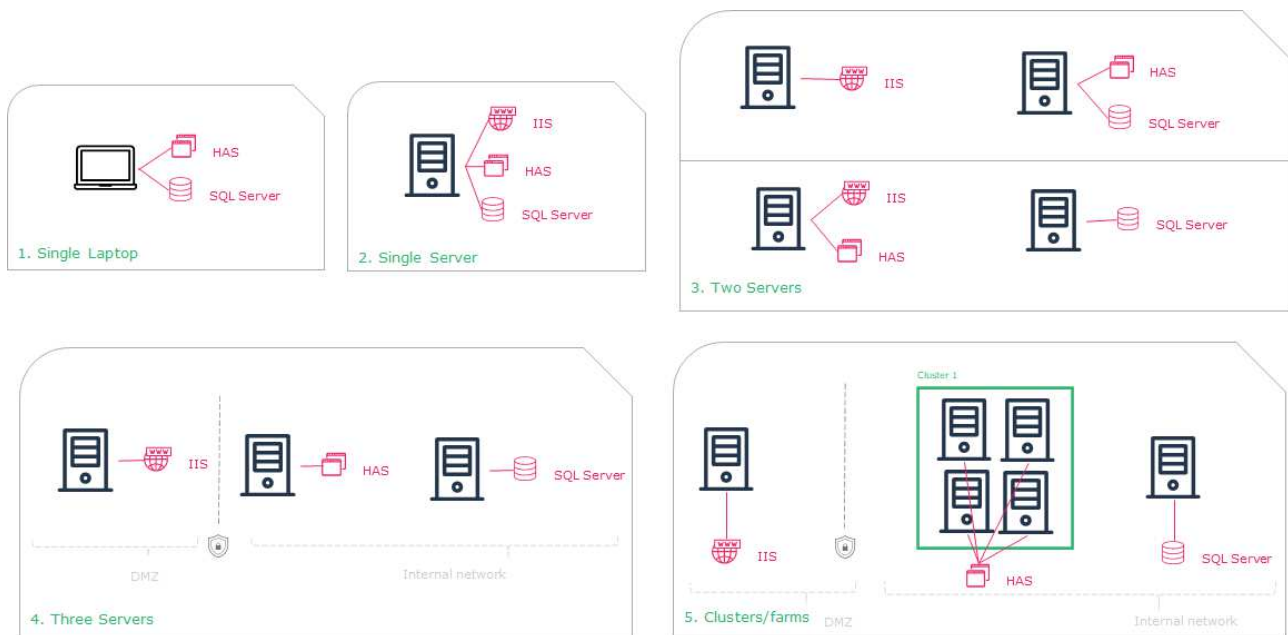


Figure 6 HAS Infrastructure deployment overview

Type	Recommend for	Comment
1	Single Laptop	For single user or developer
2	Single Server	Small deployment
3.1	Two Server	Medium deployment
3.2	Two Server	Medium deployment
4	Three Servers	Medium deployment
5	Clusters/farms	Large Deployment

The “Recommend for” is driven by the **number of concurrent users**.

Depending on customer constraints, you may need to go to number 4 or 5 deployment types to meet BCP/DRP or security constraints.

5.2. Deployment type: decision tree

Depending on your context, you may choose one or the other deployment type. This decision tree can help you decide the best option to select:

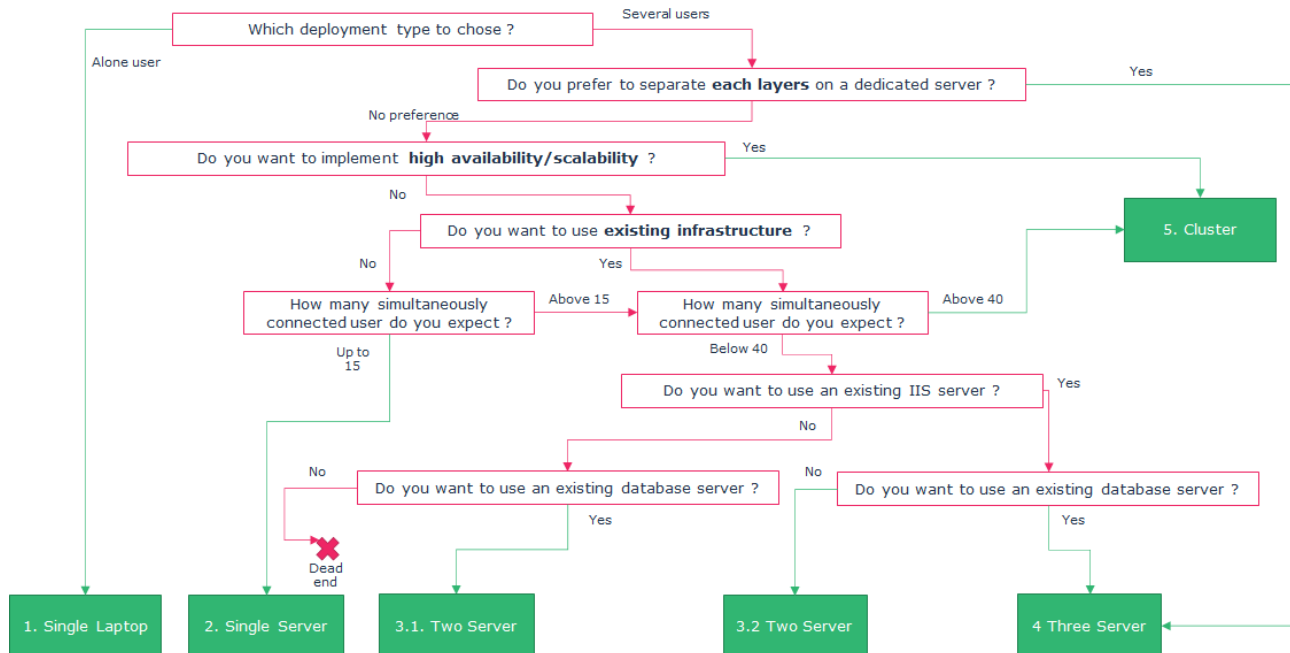


Figure 7 Deployment type Decision

For your information, the most seen deployment, regardless of the decision tree, is the one including 3 servers. In this context customers:

- Leverage existing IIS servers to address the routing of the HTTP request
- Leverage existing SQL server to create the needed database.
- Create a dedicated server for HAS

Public address = Internal address

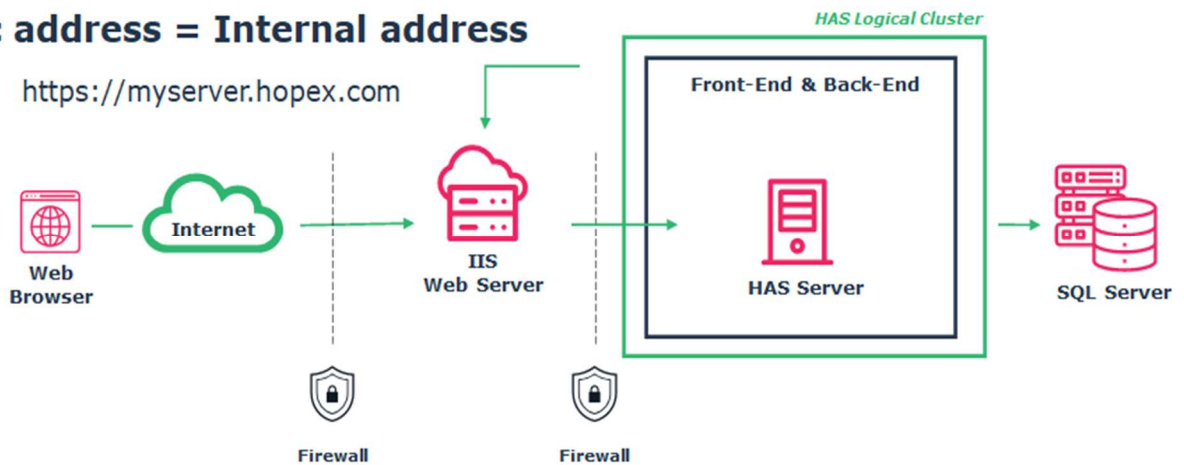


Figure 8 Most commonly seen deployment

5.3. Scaling the infrastructure

When demand for HOPEX application is increasing and you need to expand its accessibility, storage, and availability levels, you can scale vertically and horizontally.

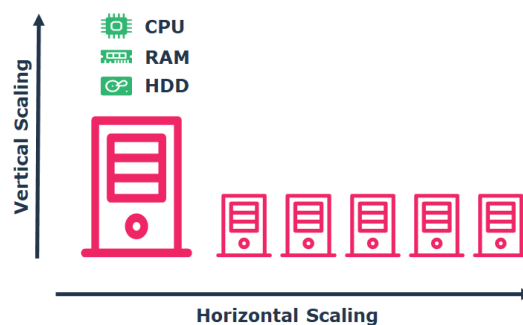


Figure 9 HAS Scaling principle

- Scaling Vertically: to improve performance, you improve existing servers by adding more CPU, RAM and disk space.
- Scaling Horizontally: to manage fail over, manage loads of concurrent users, or improve performance, you add additional servers.

The decision to scale horizontally vs. vertically depends on several factors.

If you have followed the sizing instructions, for each server (CPU+RAM) described below, the Vertical scaling will have limited impact and we recommend you scale Horizontally.

Scaling Horizontally is called **Cluster deployment**: please refer to the dedicated chapter "Cluster deployment" for further information.

5.4. Cluster deployment

Clustering is used for **availability**, **scalability**, and **load balancing** at HOPEX Application server deployment. This technique consists in using multiple servers of similar type. The HAS Servers of the cluster can be managed by the **HAS console**.

Servers can be added at three levels:

- For the web server: for multiple IIS instances placed behind a load balancer.
- For HAS Server: for multiple servers to manage front and back-end roles.
- For Database Server: in an active/passive mode.

5.4.1. HAS server - Node role

When creating a logical cluster, each node must define its role. The same node can **implement several roles**:

- Front-End: All modules of type Front-End will be run on this server.
- Back-End: All modules of type Back-End will be run on this server.
- Job: Back-End Jobs will run on this server. Particularly useful to separate heavy treatment to avoid interacting with user currently connected.

5.4.2. Scaling HAS Server

The first step is to scale the HAS Server to gain:

- Availability: ensure that there is always a server up and running
- Scalability: ensure there is enough physical resource to meet concurrent users' demand.

In this scenario you can add one, two, three... servers dedicated to HAS Server. Each server must have a set of node roles. Servers can be exclusively defined on a role or share multiple roles.

We recommend in scalability context:

- One server dedicated for Jobs
- All other servers to play both Front-End and Back-End roles

The high-level overview of such deployment can be represented by the following schema:

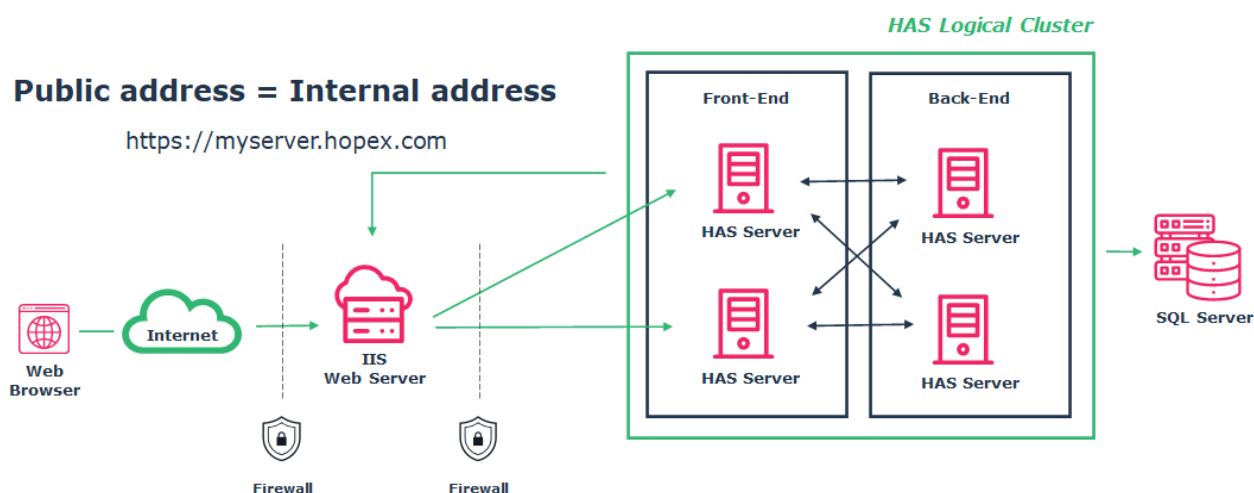


Figure 10 HAS Server Availability and Scaling with 4 servers

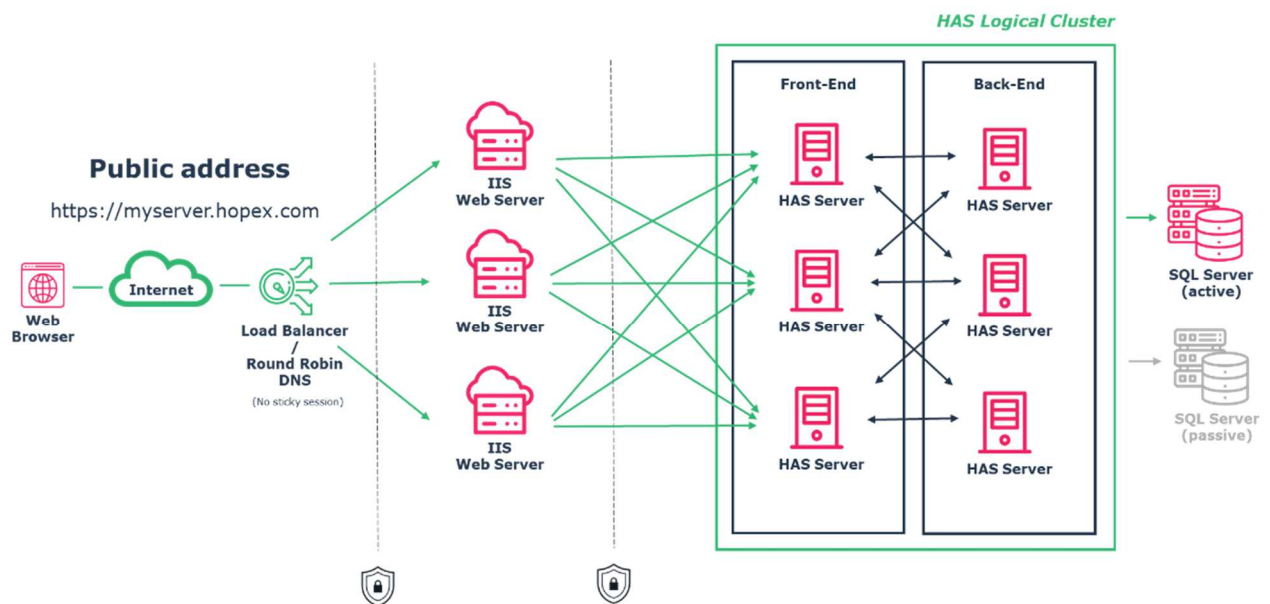
In cluster deployment HAS behaves as a logical cluster where:

- An “HAS” database contains configuration settings across nodes of the cluster.
- An internal load balancing mechanism ensures proper use of Back-End or Jobs Node.
- A cluster manager synchronizes modules versions across nodes.

5.4.3. Advanced availability cluster architecture

If you want to ensure each layer has **high availability**, then you need to duplicate all servers.

The overall architecture of such advanced scaling is described below. This schema is applicable regardless the number of chosen servers:



6. Sizing Physical Infrastructure

6.1. Disclaimer

The following sizing is based on our regular benchmark and load testing performed by the R&D. It is made based on the following assumptions:

- Smallest sizing: Possible for few concurrent users
- Small deployment: Up to 15 concurrent users
- Medium deployment: Up to 40 concurrent users
- Large deployment: Count one HAS Server for each 40 concurrent users' group.

This infrastructure can be:

- Physical server
- Virtual server: In this context the physical underlying infrastructure must be sized enough to support all running virtual servers.

We recommend dedicated server for the HAS Server layer.

MEGA has made reasonable efforts to ensure the quality, accuracy, and validity of the performance benchmarking resulting in this sizing. Changes in any of the server's parameters might cause a positive or negative effect on the user experience and performances.

6.2. Hardware sizing

6.2.1. Server configuration

This sizing is based on the following hardware configurations. All HDD are of **SSD** type in these configurations.

Sizing	CPU Core	RAM	HDD
S1	2	8	100 Gb
S2	4	16	128 Gb
S3	8	32	128 Gb
S4	16	64	128 Gb

Sizing for a server dedicated to HOPEX.

6.2.2. For Production

- Users mentioned in this table are maximum number of **simultaneously connected users**. (see below for calculation rule)
- In the cell the "S+number" represents the server configuration to choose.
- In bold are the preferred choices

Configuration		Max simultaneous users:	<2	<7	<16	<41	>40
1	Single Laptop	HAS Application Server SQL Server	S2				
2	Single Server Smallest sizing	IIS Web Server HAS Application Server SQL Server		S2	S3		
3.1	Two servers Medium Deployment	IIS Web Server HAS Application Server		S2	S2	S3	
		SQL Server		S1	S2	S2	
3.2	Two servers Medium Deployment	IIS Web Server		S1	S1	S1	
		HAS Application Server SQL Server		S2	S3	S4	
4	Three servers Medium Deployment	IIS Web Server			S1	S1	
		HAS Application Server			S2	S3	
		SQL Server			S2	S3	

Configuration		Max simultaneous users:	<2	<7	<16	<41	>40
5	Cluster/Farms Large Deployment	IIS Web Servers			S1	S1	S1
		HAS Application Servers*			S2	S3	S3
		SQL Server			S2	S3	S3

* Add one server for each additional group of users 40 users.

6.2.3. Other server environments

- For development: use Single Server with **Sizing 2**
- For training: 10 concurrent users, use **Single Server** with **Sizing 3**
- For pre-production: same infrastructure pattern as production with **Sizing 2**

6.2.4. How to calculate maximum simultaneous users

The maximum number of simultaneous users depends on the type of users:

- Main users: these are users using the tool on a regular basis. They have tasks to perform that can take several hours.
- Contributors/Viewers users: these are users that consume information and have limited production contribution. Their usage is punctual over the weeks with limited time spent when they connect.

Complete the following table to find your number of maximum simultaneous users.

License users	Number	Formula	Total
Mains users		RoundUp (Nb / 4)	
Contributors/Viewers		RoundUp (Nb / 100)	
Maximum simultaneous users:			

Example:

You have 5 process modelers, 10 portfolio managers, 40 application owners, 100 viewers. I will then have:

License users	Number	Formula	Total
Mains users	15	RoundUp (Nb / 4)	4
Contributors/Viewers	140	RoundUp (Nb / 100)	2
Maximum simultaneous users:			6

You can choose a single server or two server deployment type. In that context the preferred deployment type is the one highlighted in bold.

6.2.5. Multiple instances

The sizing proposed here is done for only 1 HAS Instance on the server. Should you be in a multi-instance scenario you need to adjust RAM consumption accordingly.

Count minimum 5 Go additional RAM for each new Instance. The needed RAM also depend on maximum concurrent users.

6.2.6. Public vs Private Workspace

In most of the desktops, HOPEX users work in public workspaces, i.e. their actions are automatically saved (within 5 min).

	Multi-Session (MS)	Single Session (SS)
Public Workspace	Default – recommended	<i>Not supported / Not Available</i>
Private Workspace	<i>Not supported / Not Available</i>	V3/V4: behavior V5: possible

Changing the behavior from public workspace to private workspace has a direct impact on sizing.

You must adjust RAM consumption: count **1Go of RAM** for each additional concurrent user.

Example: You change 10 BPA Modeler into private workspace (SS)

With the new behavior you need to add 10Go of RAM to the server.

6.2.7. Making the right choice

Refer to the decision tree to choose the deployment type.

Select the preferred configuration sizing among the deployment type.

7. SQL Server Databases

All connections to the database are done with ODBC Driver for SQL Server x64.

7.1. How many databases

For any installation there is a minimum of 3 databases for each HAS instance:

- one database to store the technical configuration of HAS
Default naming convention: HAS_“Port Number” or “HAS Cluster name”
- one database to store the business configuration and customization (SystemDb)
Default naming convention: “Database environment name”_“SystemDb”
- At least one database to store repository information
Default naming convention: “Database environment name”_“Repository name”

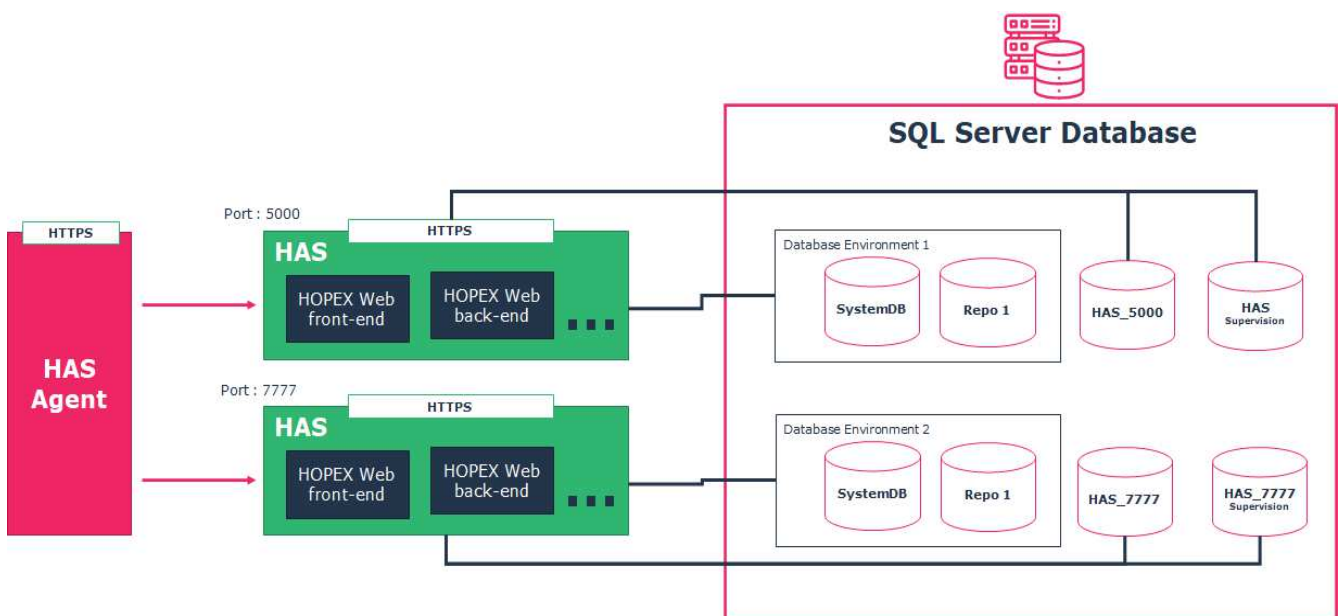


Figure 11 Database Overview

An additional Database might exist to store the data in case of the utilization of the Datamart feature.

7.2. Database size

For HAS main configuration database count 1Gb.

For each SystemDb count 5Gb to start, increase by 5Gb.

For each repository count 5Gb to start, increase by 5Gb.

Commonly seen size:

- After 5 years of usage the SystemDb repository cap up to 15Gb.
- After 5 years of usage, with 15 concurrent users, the repository goes up to 30Gb.

7.3. Database options

The two following settings are required to ensure the usage of the platform.

- Ensure that the database Collation is set to **SQL_Latin1_General_CP1_CI_AS**
- We recommend the database is created with **auto extend** property

7.4. User account and privileges

You can either set the connection string to the database with:

- a Native SQL account (*preferred choice*)
- a Windows account: all users that will connect to the database must be authorized.

HAS and HOPEX will manage:

- database creation
- tables, columns, index, stored procedure
- data insertion and modification.

It is possible to limit database creation access rights with advanced settings.

7.4.1. Native Account

- **Standard security policy (preferred choice):** the user account is enabled to manage databases.

User type	Comment	Server roles	Database roles	Server permissions
User with maximum privileges	<ul style="list-style-type: none"> • Create/delete database • Create/update/delete tables • Create/update/delete columns • Create/update/delete index • Create/update/delete stored procedures • Data read/write access 	dbcreator	Db_owner (default role)	View server state Sys.dm_exec_sessions

- **Constrained security policy:** the user is not allowed to create the database and thus the database must be created by the DBA.

User type	Comment	Server roles	Database roles	Server permissions
User with limited privileges	<ul style="list-style-type: none"> • Create/delete database • Create/update/delete tables • Create/update/delete columns • Create/update/delete index • Create/update/delete stored procedures • Data read/write access 	public	Db_owner (assigned manually by DBA)	View server state Sys.dm_exec_sessions

7.4.2. Windows Account

- **Constrained security policy:** the user is not allowed to create the database and thus the database must be created by the DBA.

User type	Comment	Server roles	Database roles	Server permissions
User with limited privileges	<ul style="list-style-type: none"> • Create/delete database • Create/update/delete tables • Create/update/delete columns • Create/update/delete index • Create/update/delete stored procedures • Data read/write access 	public	Db_ddladmin Db_datawriter Db_datareader (assigned manually by DBA)	View server state Sys.dm_exec_sessions

For more information on this Windows Account, refer to the detailed documentation.

7.5. Physical backup

We recommend you perform **physical backups** of the databases. Cold or Warm back-ups are supported.

- Frequency: Daily
- Retention: 30 days

You should also **back-up all files** located in the file server at the same time of the databases backup.

7.6. Administrative tasks

To ensure database optimal performance, of HOPEX Core, you should run (monthly or weekly) **batches** of the following stored procedures:

- Conservation of repository performance
- Deletion of historical data
- Deletion of private workspace temporary data
- Database de-fragmentation and statistics
- SQL Server storage maintenance plan (*service need to be stopped*)

8. Security

8.1. Windows Users and Groups

When you install **HAS Instance Manager**, at least one user is necessary to manage the process authentication. By default, the process that launches HAS Instance Manager is defined as a **"Local System account"**.

It is recommended to create a dedicated additional user, preferably in the Domain. In case it is not possible to have a domain user, it is still possible to have a local user.

Beware, the domain user or local user must have **read/write/execute** rights:

- On the shared folder for the licenses and HOPEX environments folders
- On the "default" installation following folder.

C:\Program Files\MEGA

C:\ProgramData\MEGA\

No active directory groups are required for this user.

If you have decided to configure the database with a Windows Account please ensure that the user has sufficient privilege.

8.2. HAS Self-signed certificate

The server works with a **self-signed certificate** for **internal communication**. It is possible to change this certificate manually after the first installation.

By default, this certificate is located in:

- C:\ProgramData\MEGA\Hopex Application Server\5000\.certificates

Caution: this certificate cannot be changed without also reinitializing the HAS configuration options.

8.3. Running processes

At runtime, the following processes must be allowed. There can be multiple processes of the same kind running in parallel, depending on the deployment options.

Process name	Comment
HAS.Instance Manager.exe	The main process for the Instance Manager.
HAS.server.exe	The main HOPEX server process
HAS.Modules.UAS.exe	The identity manager
HAS.Modules.Dtpx.exe	The web front end of HOPEX
HAS.Modules.Console.exe	The web console for the administrator
HAS.Modules.Portal.exe	The web portal of modules

Process name	Comment
HAS.Hopex.BackEnd.exe	The core back-end of HOPEX.

Complementary exe files can be launched, depending on modules deployed. Their naming convention follows the pattern **"HAS.*"**

8.4. Antivirus

To maintain good performances, it is recommended to exclude certain folders and files extensions from the antivirus real-time scanning (on access scanning). These folders and files are in the HAS Server.

Default folders, sub-folders and files to exclude:

- C:\Program Files\MEGA
- C:\ProgramData\MEGA

All files within this servers *.* should be excluded for maximum performance.

For environment and must license some extensions must be exclude:

- *.MZL, *.MOL, *.MGL, *.MGR
- *.MGS
- *.haspkg

8.5. Firewall

The firewall and proxy must be configured to allow communications by the different protocols on the ports mentioned above, across all the servers of the deployment.

The firewall and proxy need to allow downloading of the *.haspkg files.

8.6. User Authentication

After installation, the default HOPEX authentication is available. Other authentication models need to be configured in the HAS console. An authentication workflow, based on Identity Server 4, provides:

- secure authentication requests.
- leverage standard identity providers.

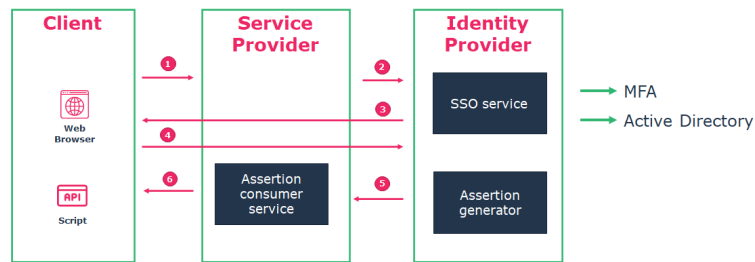


Figure 12 Authentication Workflow

In all cases, the service provider is managed by the HAS and the Identity Provider (IP) can be HOPEX or external.

Several authentication models can be implemented (one or several at the same time):

Authentication model		Comment	IP	SSO
Default HOPEX	HOPEX	Users and passwords are stored, hashed, within the HOPEX SystemDb database. The full workflow of login is managed by HOPEX (SP+IP)	HOPEX	No
	Windows	Passwords are managed by Windows	HOPEX	No
	LDAP	Users and Passwords are stored in the LDAP directory. Users can be already in SystemDB or created on the fly.	HOPEX	No
Windows Authentication		The identity provider is based on Windows Identity Foundation.	ADFS	Yes
SAML2		The identity provider is external and manages the user credentials	ADFS, Okta...	Yes
OpenID		The identity provider is external and manages the user credentials	Microsoft, Google, Salesforce...	Yes

For HOPEX Identity Provider the passwords are encrypted in AES256.

8.7. Data Access

Access to data is controlled using profiles:

- repository access,
- CRUD data permissions,
- CRUD GUI permissions.

Complementary features enable:

- writing access management: control of updates on existing objects.
- reading access management: control of visibility regarding existing objects.
- data access rules: computed control of visibility regarding existing objects.

8.8. Cookie security policy

Before performing any audit on the application and checking cookie settings, make sure you are in full HTTPS (IIS and internal communication).

The following table lists the cookies the web page might use or generate.

The table shows default values for a full HTTPS deployment. Values may vary in HTTP.

Cluster name: is the name of the cluster when you created the instance.

Cookie name	Domain	Expires	Http only	Secure	Same site
.oidc.nonce."clustername"	Public URL	10 min	True	True	None
.oidc.correlationId."clustername"	Public URL	10 min	True	True	Lax
.antiforgery."clustername"	Public URL	Session	True	True	Strict
idsrv.session	Public URL	Session	False	True	None
.token."clustername"	Public URL	20 min	True	True	Lax
.token."clustername"C1	Public URL	Session	True	True	Lax
.token."clustername"C2	Public URL	Session	True	True	Lax

8.8.1. Why Idsrv is always http only = false

As per specification of open id the idsrv session cookie will always be in Http only = false.

For more details, see the official documentation:

https://openid.net/specs/openid-connect-session-1_0.html#ChangeNotification

"... If a cookie is used to maintain the OP User Agent state, the HttpOnly flag likely cannot be set for this cookie because it needs to be accessed from JavaScript. Therefore, information that can be used for identifying the user should not be put into the cookie, as it could be read by unrelated JavaScript..."

8.8.2. How to enforce Same site Strict or Lax

Should you want to enforce cookies "Same site" to be:


- None
- Strict
- Lax → default

You can edit the value in the HAS Console.

Limiting to Strict may limit module and feature enablement.

MEGA
HOPEX

HOPEX Application Server - Console


Installation 

HAS Settings


Server updates

Maintenance

Cluster Nodes

Modules 

Cluster

Monitoring 

Settings

Web settings


Expiration session time*

Session cookie expiration in minutes (default is 20)

20

Cookies SameSite option

Let this field to 'default' for using value defined by the system (Lax or None)

default 

9. File Server

The file server is used to share files across the HAS servers. The main data is:

- Database environment files: connection string, temporary files
 - *.MZL, *.MOL, *.MGL, *.MGR, *.XMG
 - *.IX, *.LOG, *.DAT
- Must License: to manage connected users and related tokens
 - *.MUST
 - *.INI, *.TNK*, *.USR*

The files contained in this folders will be accessed by the tool. To enhance usage, you need to make sure policy on proxy, firewall, and antivirus are configured properly to avoid blocking, scanning this files.

10. Supervision and monitoring

The HAS server enables platform supervision and monitoring. Supervision events update the logs or trigger events to be sent to external tools.

The HAS Server can be configured with:

- Logs: with an external tool using HTTP protocol and Compact Log Event Format (CLEF). Supported tool SEQ <https://datalust.co/seq>
- Tracing: with an external tool using HTTP and Open Tracing. Supported tool Zipkin <https://zipkin.io/>

11. Error and trace log files

No logs are generated on the client side. All errors are displayed using popup windows or via the HTML browser. An option enables to control the display of errors to end users (GUI). For advanced diagnostic, a verbose mode can be enabled to generate more detailed logfiles.

Different files can be created on server side. There are 2 main **default locations** for the logs:

- C:\ProgramData\MEGA\Hopex Application Server\logs
For the logs of the HAS Instance Manager.
- C:\ProgramData\MEGA\Hopex Application Server\5000\Logs
For the logs of the **HAS Instance**: HAS server and all the modules.
Where "5000" is the port number of the instance

General naming convention of log files:

"cluster name"-["Module name"-["Module version"]]-YYYYMMDD.txt

Where:

- Cluster name: is the name of the cluster or the port number
- Module name: is the name of the module defined in the manifest
- Module version: the full build version of the module as defined in the manifest
- YYYYMMDD: represents the year, month and day

Example:

5000-[HAS.CONSOLE-1.0.301]-20201104.txt

5000-[HAS.UAS-1.0.301]-20201104.txt

Log name	Content
5000-[HAS-X.X.X]-YYYYMMDD.txt	Main HAS Server log
megaerrYYYYMMDD.txt	Main logs of HOPEX
5000-[HAS.CONSOLE-X.X.X]-YYYY.txt	For logs on the HAS console
5000-[HAS.PORTAL-X.X.X]-YYYYMMDD.txt	For logs on the portal that expose all web modules
5000-[HAS.UAS-X.X.X]-YYYYMMDD.txt	For logs about identity manager
5000-[HOPEX WEB DESKTOP-X.X.X]-YYYYDDMM.txt	For logs of the web part of HOPEX
sspsprvsYYYYMMDD.txt	Supervision error logs

Log name	Content
ssperrYYYYMMDD.txt	Errors generated by the SSP when assigning a user to an environment
redis_server_log.txt	Redis logs in case of cache issues.
HopexHealthDigestReportYYYY-MM-DD_XX-XX-XX.html	Report to diagnose HOPEX usages and performance
HopexHealthFullReportYYYY-MM-DD_XX-XX-XX.html	Report to diagnose HOPEX usages and performance
RepositoryHealth-YYYY-MM-DD-MyEnvironment_MyRepository	Report to diagnose HOPEX usages and performance

12. Miscellaneous

12.1. Licensing

Products and solutions of HOPEX platform are protected by Must licenses. Must licenses can be shared between multiple users.

Must licensing is not server-based (there is no Windows process for a license server). At runtime with HOPEX Web Front-end, a set of files are generated dynamically by service account.

However, a domain user (Active directory) is required for:

- HAS Instance Manager.
- User running the Desktop Administration Console: system administrator, functional administrator.
- User running the Desktop Windows Front-end: developer, functional administrator, user associated to a scheduled task.

To obtain a license, contact your sales representative. A UNC will be requested and a .must license file (locked on this UNC) will be sent with installation instructions.

12.2. Full search and indexing

Solutions of HOPEX platform can use full search. A parameter at data repository and/or system repository level enables to activate indexing. There are 2 levels of indexing:

- Full indexing: the data repository/system repository is scanned, and index files are created in a subfolder of the data repository/system repository.
- Incremental indexing: the log (internal) of the data repository/system repository is scanned and index files are updated in a subfolder of the data repository/system repository.

12.3. Mail system

A mail server needs to be configured so that mail notifications can be used within workflows.

SMTP parameters (server, port, proxy...) can be configured for the installation using the Administration console.

12.4. Multi-language

The HOPEX Platform supports multilingualism for:

- User interface language: controls the display of the menus, pages, etc. **Six languages** are provided: English, French, German, Italian, Spanish, Portuguese.
- Input Data language: enables data entry in several languages for the objects (name, comment, ...). **Up to 30 languages are supported.**

12.5. Reporting

There are several report capabilities:

Category	Format	Export	Comment
Report	HTML	RTF, XLS, PDF	Generate a report based on a HTML template
MS Word	RTF	RTF	Generate a report based on a Word template
Instant Report	HTML	RTF, XLS, PDF	From a list or dataset generate various charts (pie, histogram...) or tables

You need to have a software that can read the defined **export format**. For instance:

- Microsoft Office or Open Office for RTF, XLS
- Adobe Reader for PDF

13. Other Technical Documentation

For more information, see the following **online documentation**:

- Installation procedures
- RDBMS Repository Installation guide
- HOPEX Administration documentation to manage installation and users
- Must licenses management
- HOPEX Administration Authentication
- Technical articles
- REST API & Server API (Java)
- Functional usage and features see user manuals

14. Frequently Asked Questions (FAQ)

14.1.1. What about other HTML browsers?

MEGA has decided to focus on Chrome, Edge Chromium, Firefox. This does not mean that solutions do not run on other HTML browsers. It means that these HTML browsers are not tested.

14.1.2. Are both 64-bit and 32-bit versions of HTML browsers supported?

MEGA has decided to focus on 64-bit versions of HTML browsers. 32-bit versions of HTML browsers are less qualified. This does not mean that the solutions do not run on such HTML browsers.

14.1.3. Is Edge Classic/Legacy supported?

Edge classic (Legacy version not Edge Chromium) is not supported. MEGA has decided to focus on Edge Chromium.

14.1.4. What is HOPEX Classic deployment?

Classic deployment is the former way to deploy HOPEX from first version (V2, V3, V4). It mainly relies on IIS and HOPEX SSP component. This document is the new HAS Architecture from V5.

14.1.5. Are Windows Server 2012 and Windows Server 2012 R2 still supported?

No. It will not work.

14.1.6. Is SQL Server 2014 or 2017 still supported?

SQL Server 2014 and 2017 are not recommended, use it at your own risks. Support starts from SQL Server 2019 and SQL Server 2022.

14.1.7. What is web storage for HTML browsers?

This is a capability of HTML browsers to store data (local storage mode)

This capability is supported by all recent browsers (Edge, Firefox, Chrome...)

14.1.8. What is supported for Azure?

Not all azure services are compatible with HOPEX

Here are the main options qualified by MEGA so far and used to provide MEGA SaaS:

- VM DS11_V2
- Premium storage Managed disk (SSD disk)

- Backup (backup of VM)
- WAF (Web Application Firewall) tuning required
- Deployment script (deployment by script)
- Image (deployment by image)
- Monitoring

If you consider using other services, contact MEGA Technical Support.

14.1.9. What is Mozilla Firefox ESR?

As Firefox versions change very rapidly, MEGA has decided to focus on ESR versions. Extended Support Release (ESR) based on an official release of Firefox for desktop is used by organizations that need extended support for mass deployments.

See also <http://www.mozilla.org/en-US/firefox/organizations/faq/>

14.1.10. Are IE 9/10/11 still supported?

Internet Explorer 9, 10, 11 are no longer supported.

MEGA recommends using a more recent HTML Browser such as Edge Chromium or Chrome. See also <https://support.microsoft.com/en-en/lifecycle>

14.1.11. How to configure HTTPS?

By default the HAS server is in HTTPS. Note that a certificate for IIS is required to configure HOPEX in HTTPS end to end: see your IIS administrator.

14.1.12. It is possible to use a Must license that is not located on the HAS Server?

This is possible. The Share folder must be accessible from the user that launches the process.

14.1.13. Is it possible to use another web server than IIS?

We use IIS for load balancing. MEGA does not provide any documentation to support Nginx or Apache.

14.1.14. Can HOPEX solutions and products run on a mobile platform?

Most HOPEX products and solutions are designed for a web client running on a desktop or laptop. Viewer users can use tablets running Android. Viewer users can consult data usually through a simplified desktop.

In addition to the HOPEX platform, MEGA proposes various web applications that are natively designed for smartphones and tablets. See HOPEX Store.

14.1.15. What are the web technologies used by HOPEX Platform?

For HOPEX Web Front-end, the HOPEX platform uses HTML5 and various JavaScript related technologies mainly: Ajax., Extjs., Dojo.

A detailed list of third-party components is available on MEGA Community

<https://community.mega.com/t5/Open-Source-in-HOPEX-Software/bg-p/legal>

14.1.16. What about other database servers?

MEGA has decided to focus on widespread and recent versions of SQL Server 2019 and above.

HOPEX Application Server (HAS) Installation Guide – V5

1. Foreword	4
1.1. Installation & Architecture	4
1.2. Step Overview	5
1.3. Different architecture installation scenario	6
1.4. Summary of my Installation	7
2. IIS Web Server	9
2.1. Adding SSL Certificate	9
2.2. Installing IIS	10
2.3. Installing URL Rewrite	12
2.4. Installing ARR	15
2.5. Configuring Sites	16
2.6. Configuring Server Farm - ARR	18
2.7. Request Filtering	25
2.8. Configuring Logs files details and location	28
3. HOPEX Application Server (HAS) installation	35
3.1. Installing the prerequisite software	35
3.2. Configuring the file server	36
3.3. Downloading HAS Server installer	38
3.4. Getting your installation key	38
3.5. Installing HAS Instance Manager with the setup	40
3.6. Creating HAS Instance	46
3.7. First connection to HAS Console	51
3.8. Adding Must license to MegaSite.ini setting	52
3.9. Creating or referencing HOPEX environment	53
3.10. Configuring the non-interactive desktop heap	66
3.11. Configuring Java Heap size (optional)	67
3.12. Windows User and access rights	67
3.13. Installing a DEV server	69
4. SSL Certificates configuration	70
4.1. Configuring public SSL Certificate (1)	70
4.2. Configuring HAS Cluster node SSL Certificate (2)	71
4.3. Adding certificate on the server	71
4.4. Creating and using a custom cluster SSL certificate	73
4.5. Disabling vulnerable cypher suites	78
5. SQL Server configuration	82
5.1. Character encoding	82
5.2. Database user	82
5.3. Database connection string	82
5.4. User grants	83
6. Cluster installation	84
6.1. Multiple HAS Server	84
6.2. Multiple IIS Server	87
6.3. Multiple SQL Server	89
7. Installation errors and tests	90
7.1. Testing URL DNS	90

7.2. Checking communication between servers	91
7.3. Testing SSL Certificates	92
7.4. Testing HAS	94
7.5. Testing Web HOPEX.....	97
7.6. Testing Desktop client	98
8. Installation in multi-tenant scenarios	100
8.1. Multi-environments – Multi-instances	100
8.2. Multi-version scenario.....	103
9. Other installation topics.....	105
9.1. Using Server API.....	105
9.2. Publishing Static Website	105
10. Post installation checklist	109
11. Uninstallation procedure	111
11.1. Removing IIS.....	111
11.2. Removing HOPEX applications.....	114
11.3. Removing RDBMS databases	117
12. FAQ	118

1. Foreword

The document describes the installation procedure for HOPEX Application Server (HAS). This document applies to HAS installation from HOPEX V5 onward. Check if a more recent version of this document is available via the online MEGA Community.

Other documentations are available. Please refer to the online MEGA Community for other topics.

The option given for IIS and SQL Server may vary depending on your existing situation. A specific study from MEGA professional services might be required.

1.1. Installation & Architecture

Prerequisite: read the *HAS Architecture Overview* documentation prior to start the installation.

This installation describes installation and configuration of each layer:

1. SQL Server → actions are **manual**, see chapter 5: "SQL Server configuration"
2. IIS Web Server → actions are **manual**, see chapter "2 IIS Web Server"
3. HAS Server → actions are performed with a "**setup**", see chapter 3 "HOPEX Application Server (HAS) installation"

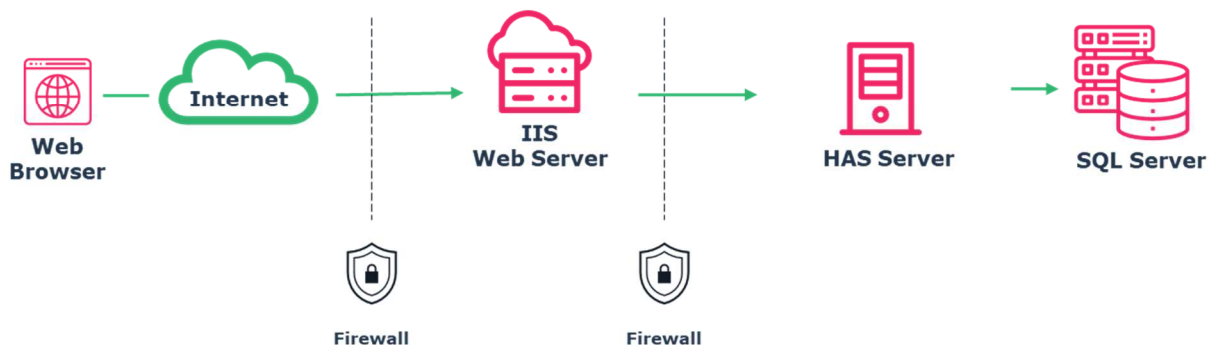
Each layer can be installed on one or several servers depending on the chosen infrastructure deployment pattern.

This document describes installation with Windows Server and SQL Server. Adjust accordingly should you be in another version. Always check prerequisite.

Each main chapter of this documentation describes the following architecture pattern:

Public address

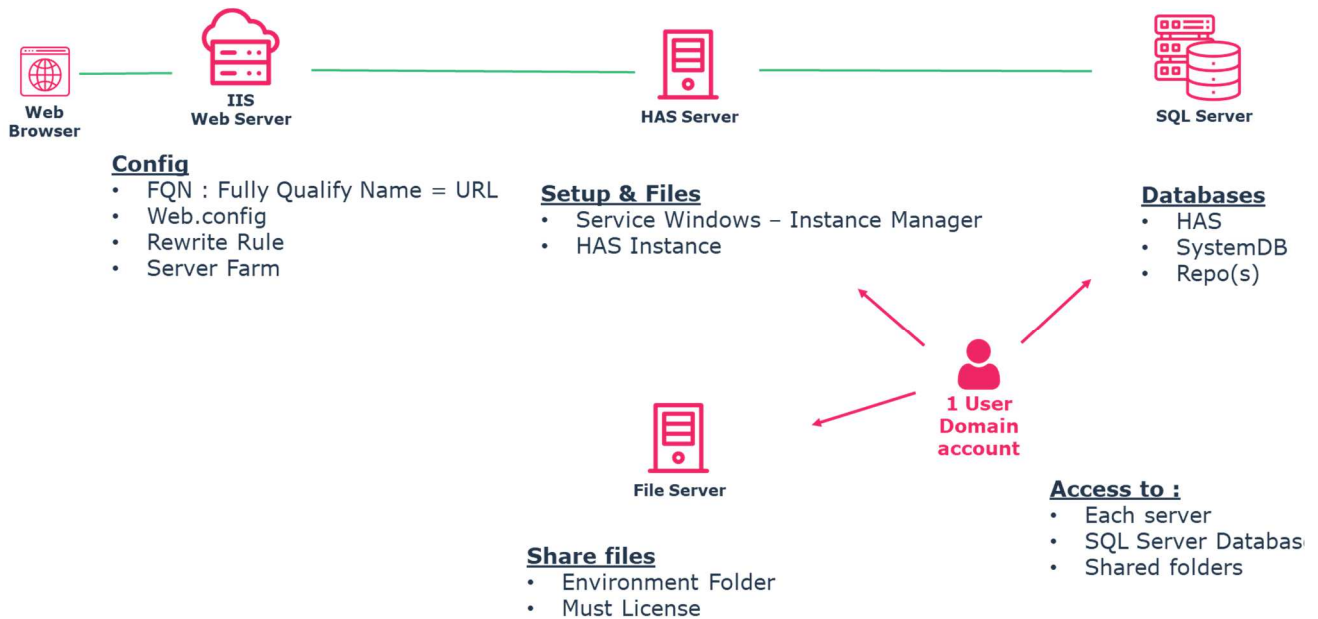
<https://myserver.hopex.com>



Three layer installation

1.2. Step Overview

1.2.1. Major actions



1.2.2. Database installation

As this step is performed by the customer database administrator, its description is not detailed in this documentation.

This documentation describes the database creation and backup restore or specific settings required.

See chapter 5: [SQL Server configuration](#).

In case of cluster deployment: there is no difference for database creation/restore.

1.2.3. IIS Web Server installation

This step is **mandatory** for all deployment except for developer laptop scenario.

See chapter 2: [IIS Web Server](#).

In case of cluster deployment: repeat the process for each IIS server. Configure your load balancer accordingly. Read the cluster deployment for more details.

1.2.4. HAS Application Server installation

This step is **mandatory** for all deployment.

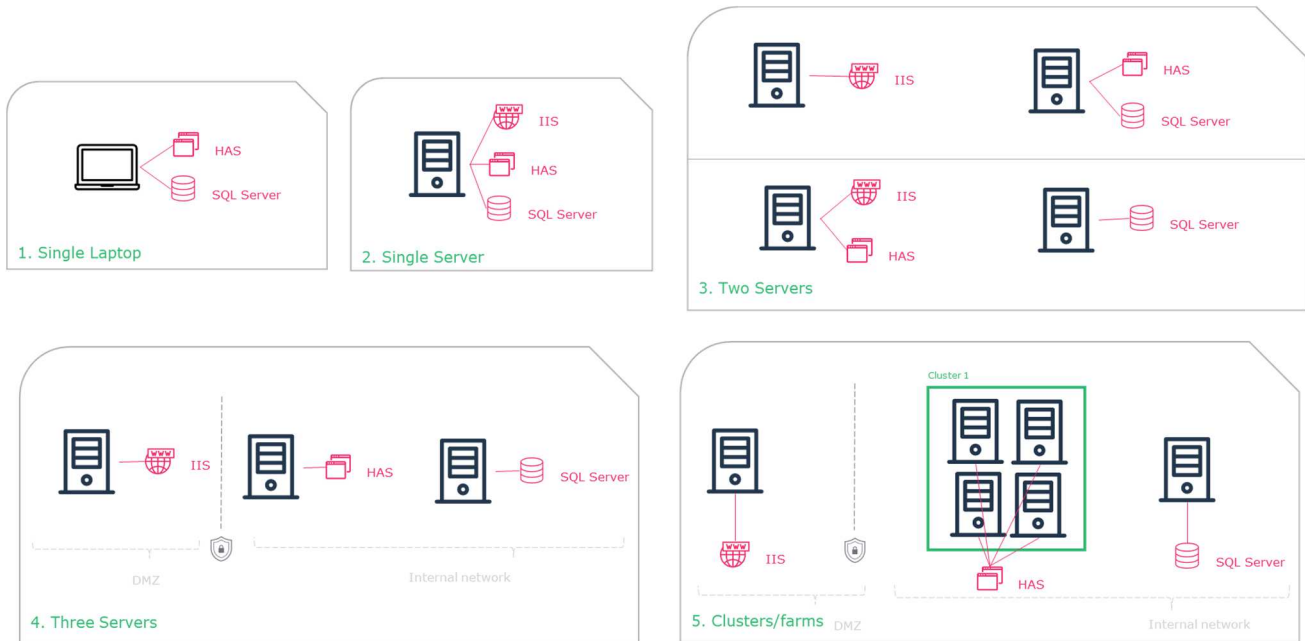
See chapter 3: [HOPEX Application Server \(HAS\) installation](#).

In case of cluster deployment: apply this step for **the first server** of the cluster farm.

Ensure your installation is working then read the section about cluster deployment for more details.

1.3. Different architecture installation scenario


Depending on the installation architecture pattern you choose, you need to repeat the installation steps described in the coming chapters.



Perform installation steps described in chapter		
1	Single Laptop	<ul style="list-style-type: none"> 3 HOPEX Application Server (HAS) installation
2	Single Server	<ul style="list-style-type: none"> 2 IIS Web Server 3 HOPEX Application Server (HAS) installation 5 SQL Server configuration
3.1	Two Servers	<ul style="list-style-type: none"> 2 IIS Web Server 3 HOPEX Application Server (HAS) installation 4 SSL Certificates configuration 5 SQL Server configuration
3.2	Two Servers	<ul style="list-style-type: none"> 2 IIS Web Server 3 HOPEX Application Server (HAS) installation 5 SQL Server configuration
4	Three Servers	<ul style="list-style-type: none"> 2 IIS Web Server 3 HOPEX Application Server (HAS) installation 4 SSL Certificates configuration 5 SQL Server configuration
5	Cluster	<ul style="list-style-type: none"> 2 IIS Web Server 3 HOPEX Application Server (HAS) installation 4 SSL Certificates configuration 5 SQL Server configuration 6 Cluster installation

1.4. Summary of my Installation


Complete/Print this architecture diagram and use it to ease your installation process for each environment.



2. Single Server

☐ Chosen deployment


server name	
IP address	



3. Two Servers

☐ Chosen deployment


server name	server name
IP address	IP address



3. Two Servers

☐ Chosen deployment

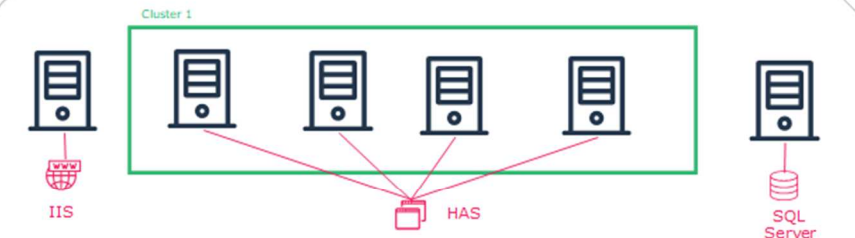
server name	server name
IP address	IP address



4. Three Servers

☐ Chosen deployment

server name	server name	server name
IP address	IP address	IP address



5. Clusters/farms

☐ Chosen deployment

	server name	IP address	HAS Agent	HAS
HAS Server 1	server name	IP address	Port	Port
HAS Server 2	server name	IP address	Port	Port
HAS Server 3	server name	IP address	Port	Port
HAS Server 4	server name	IP address	Port	Port

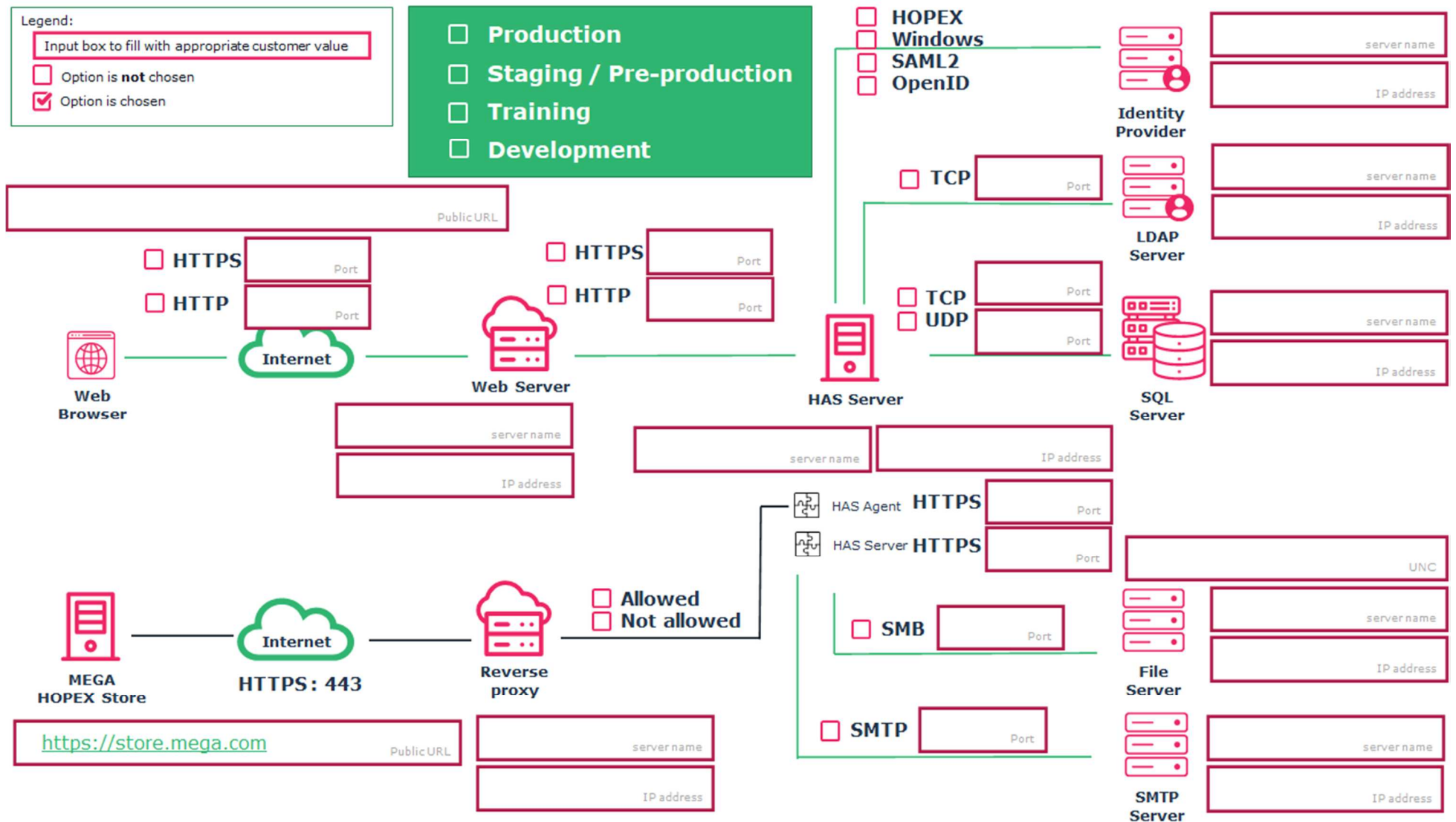
☐ Production

☐ Staging / Pre-production

☐ Training

☐ Development

Complete/Print this architecture diagram and use it to ease your installation process.



2. IIS Web Server

The following installation instructions are to be applied on each server that will behave as an "IIS Web Server". The following instructions apply to Windows Server 2019. For other Windows versions adjust accordingly.

Should you have several IIS, you need to add a load balancer (no sticky session) in front.

For information:

- one IIS Web server is suitable for most deployments.
- IIS is **not required for single laptop** deployment (consultant, developer, partners), in that case skip this chapter.

2.1. Adding SSL Certificate

To ensure data protection, it is highly recommended to use SSL/TLS. If you want to activate this feature, it is then mandatory, as a prerequisite, to configure your IIS platform to activate the SSL/TLS.

You will need to have a **signed certificate**. You can bind the HTTPS protocol to any wanted port, in the installation process you will choose the port.

For official Microsoft documentation on IIS, see <https://docs.microsoft.com/en-us/iis/manage/configuring-security/configuring-ssl-in-iis-manager>.

2.1.1. Adding certificate on IIS Web Server

Make sure the SSL certificate has been properly imported in windows certificate store, see the instructions section 4.3 [Adding certificate on the server](#).

In that example the public url of the installation is <https://vp-iis1-v5.fr.mega.com>. Adjust naming based on your own policy and naming convention. Ensure this is a **signed certificated**.

2.1.2. Adding certificate on IIS

The certificate will be automatically visible when you edit the binding of your website. If it does not appear it means the certificate is not valid or you missed a step in previous section.

The instructions are explained in the following steps.

2.2. Installing IIS

If IIS is already installed, please check that all required features are enabled

To install IIS:

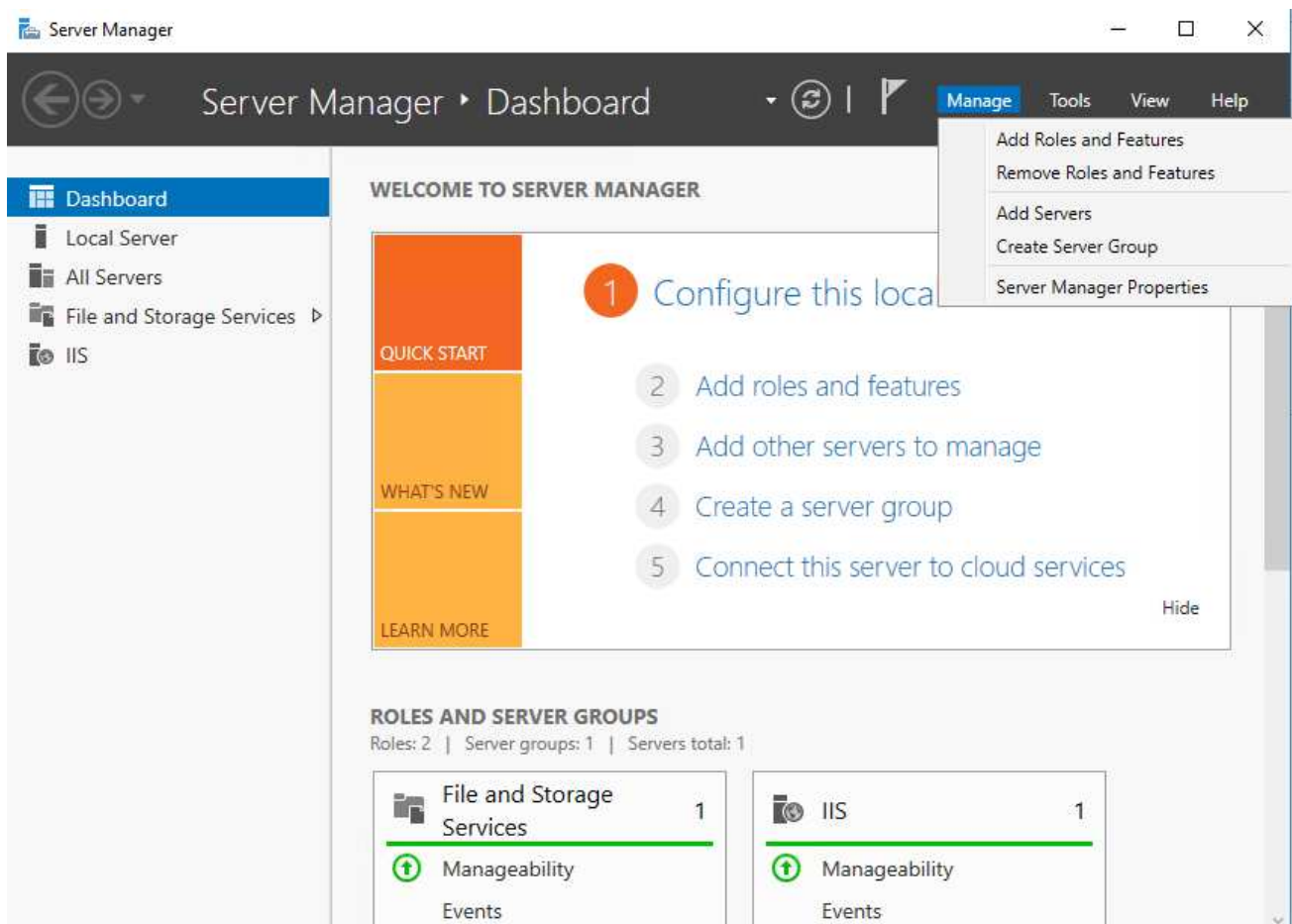
1. In Windows Operating System turn on IIS and its features:

From Control Panel: "Turn Windows features on or off"

Or

From Server Manager: Add Roles and features (<https://docs.microsoft.com/en-us/windows-server/administration/server-manager/server-manager#start-server-manager>)

2. Click **Manage** > **Add Roles and features**.



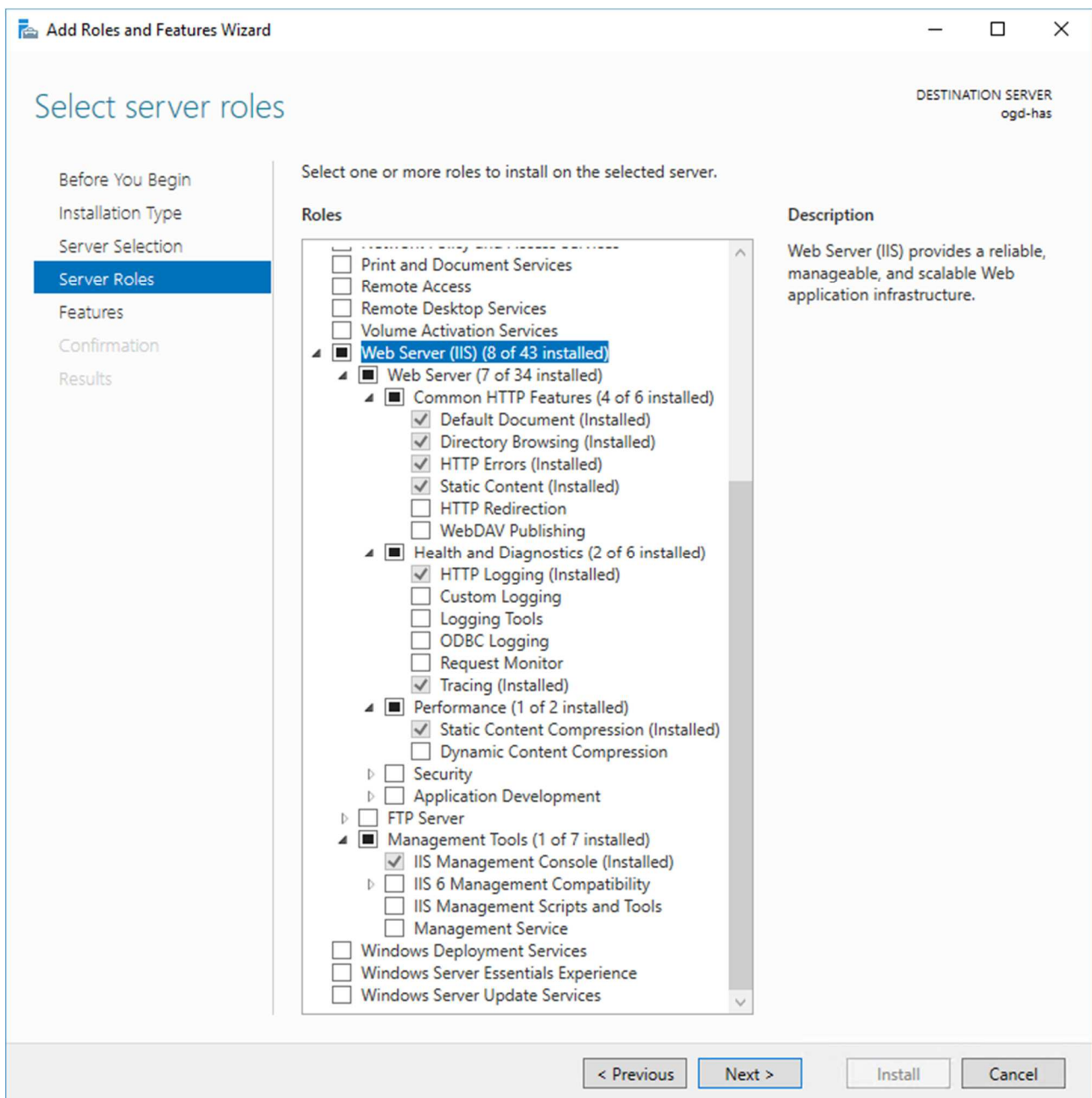
3. In the pop-up Wizard, click **Next**.
The **Server Roles** page is displayed.
4. Select: **Web Server (IIS)**.
5. If prompted click **Add Features**.
6. Ensure the following options are selected:

Web Server:

- Common HTTP Features
 - Default Document
 - Directory Browsing
 - HTTP Errors
 - Static Content
- Health and Diagnostics
 - HTTP Logging
 - Tracing
- Performance
 - Static Content Compression

Management Tools:

- IIS Management Console



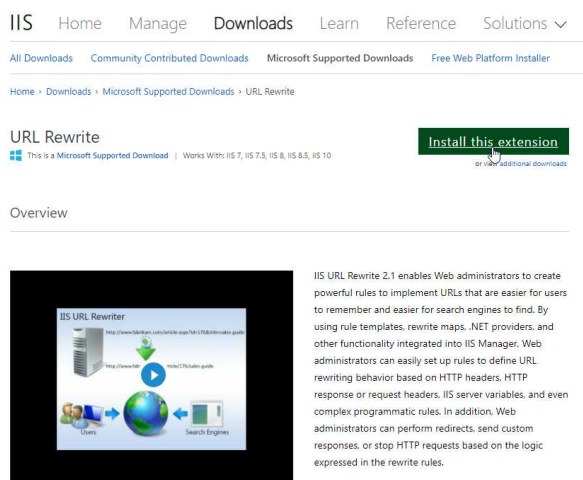
7. Click **Next** to **Install IIS** and its related features.

2.3. Installing URL Rewrite

URL Rewrite is tightly integrated with IIS Manager and is a prerequisite for ARR to work as expected.

To install URL Rewrite:

1. Download "**rewrite_amd64_en-US.msi**" URL Rewrite from official IIS website: <https://www.iis.net/downloads/microsoft/url-rewrite>.
2. Click **Install this extension** to get the **Web installer**.
3. Scroll down to **Download URL Rewrite Module** section to select an **offline installer**.



Download URL Rewrite Module 2.1

- English: [Web Platform Installer \(WebPI\)](#) / [x86 installer](#) / [x64 installer](#)
- German: [x86 installer](#) / [x64 installer](#)
- Spanish: [x86 installer](#) / [x64 installer](#)
- French: [x86 installer](#) / [x64 installer](#)
- Italian: [x86 installer](#) / [x64 installer](#)
- Japanese: [x86 installer](#) / [x64 installer](#)
- Korean: [x86 installer](#) / [x64 installer](#)
- Russian: [x86 installer](#) / [x64 installer](#)
- Chinese Simplified: [x86 installer](#) / [x64 installer](#)
- Chinese Traditional: [x86 installer](#) / [x64 installer](#)

4. Choose:
 - **Web Platform Installer** if the server has **internet access** connection.
 - **x64 installer** if the server does not have internet access.

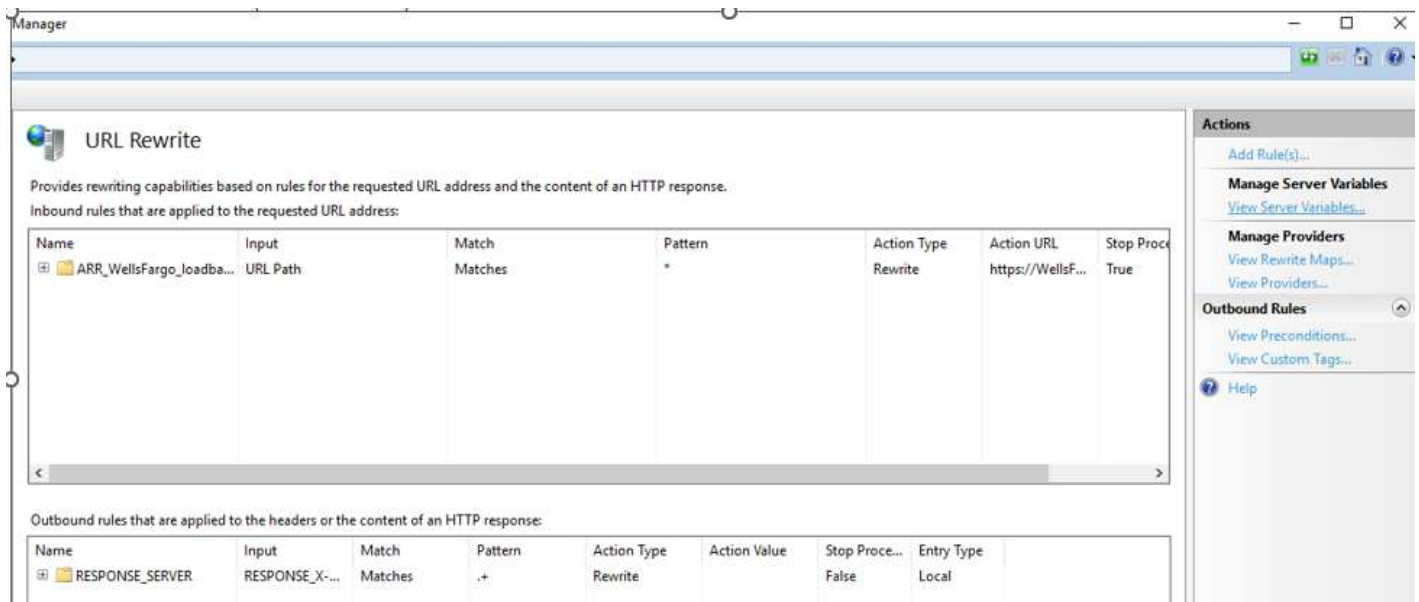
5. Launch the installer:

Step 1	Step 2	Step 3
<ul style="list-style-type: none"> Select Accept the terms in the License Agreement Click Install 	<ul style="list-style-type: none"> Click Next if needed 	<ul style="list-style-type: none"> Click Finish

2.3.1. Security: removing X-Powered-By header

To remove x-powered-by header:

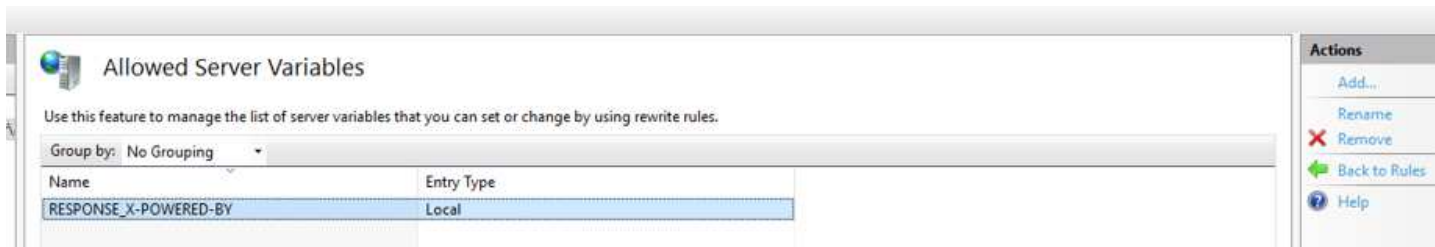
1. Access **URL Rewrite**.



2. Create a variable:


a) in **Actions > Manage Server Variables**, click **View Server variables**.

b) Add the **RESPONDE_X-POWERED-BY** variable.



3. At rule level, **Add** an **Outbound Rule**.

For more details see <https://techcommunity.microsoft.com/t5/iis-support-blog/remove-unwanted-http-response-headers/ba-p/369710>



Edit Outbound Rule

Name:

RESPONSE_SERVER

Precondition:

<None>

Edit...

Match

Matching scope:

Server Variable

Variable name:

RESPONSE_X-POWERED-BY

Variable value:

Matches the Pattern

Using:

Regular Expressions

Pattern:

.+

Test pattern...

☒ Ignore case

Conditions

Action

Action type:

Rewrite

Action Properties

Value:

☒ Replace existing server variable value

☐ Stop processing of subsequent rules

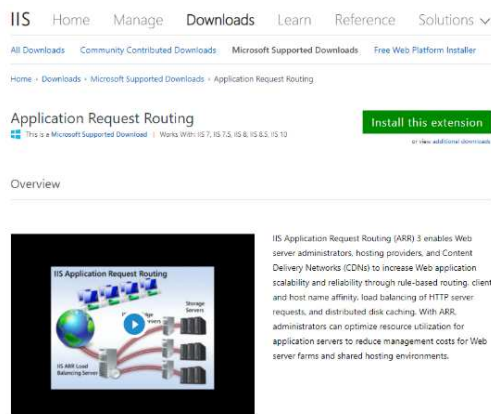
2.4. Installing ARR

IIS Application Request Routing (ARR) is required to map the official “URL DNS” to the HAS server farm that will handle the web request.

To install IIS ARR:

1. Download IIS Application Request Routing (ARR) 3.0
“**requestRouter_amd64.msi**” from the official website:
<https://www.iis.net/downloads/microsoft/application-request-routing>
2. For online server: click **Install this extension** to get the **Web installer**.

Or for offline server: scroll down to **Download URL Rewrite Module** section to select an **offline installer**.



- Intelligent byte-range support
- Intelligent live request support
- Caching while serving responses

Download ARR 3.0

- [Web Platform Installer \(WebPI\)](#) / [x86 installer](#) / [x64 installer](#)

Installing ARR 3.0 manually

ARR depends on URL Rewrite. Ensure [URL Rewrite](#) is installed prior to installing ARR. Alternatively, use the [Microsoft Web Platform Installer link](#) instead which installs the ARR and its dependency in the right order.



3. Choose:
 - **Web Platform Installer** if the server has **internet** access connection
 - **x64 installer** if the server does not have internet access

4. Launch the installer:

Step 1	Step 2	Step 3
Select Accept the terms in the License Agreement Click Install	Click Next if needed	Click Finish

2.5. Configuring Sites

Caution: this configuration may change if you leverage an existing IIS Server

In that configuration the IIS server is dedicated to HOPEX Application Server Deployment.

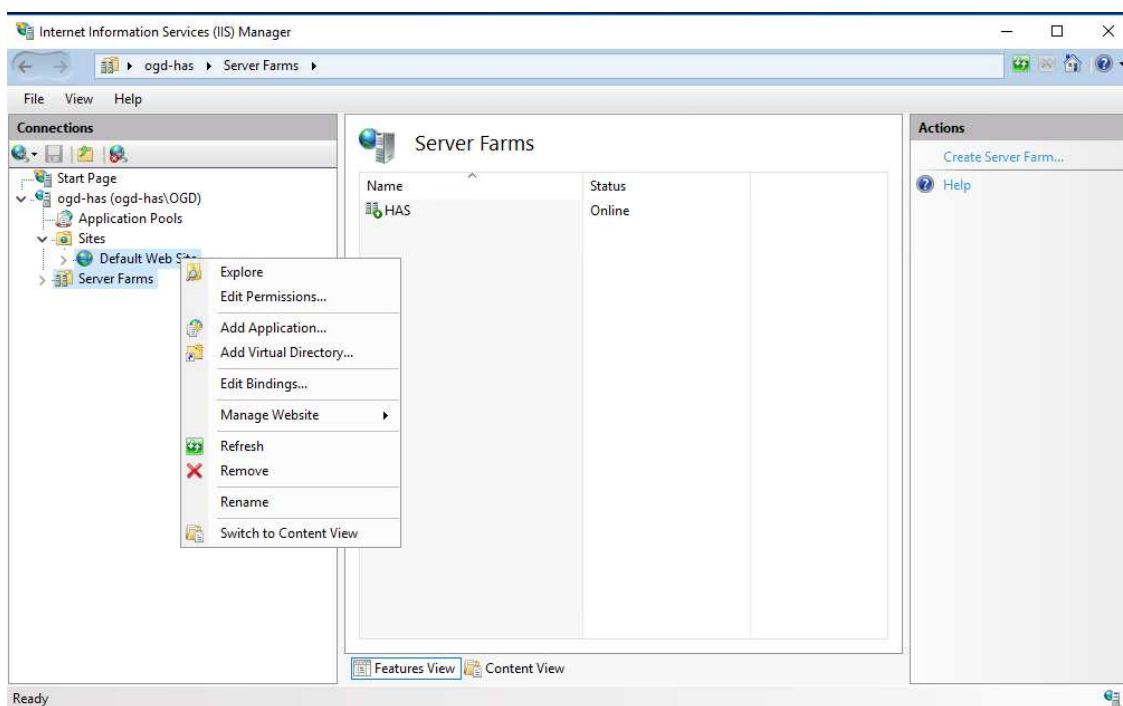
There is no other Website expose by this IIS Server. Should there be other website you will need to adjust URL rewrite rules.

The following steps detail how to configure the IIS Server on HTTP (80) or HTTPS (443).

You must choose one or the other. A mix of HTTPS and HTTP **is not allowed**.

To configure Sites:

1. Right-click **Default Web Site** and select **Edit Binding**.



2. For:

an HTTP configuration, see section 2.5.1 [Configuring HTTP port 80](#).

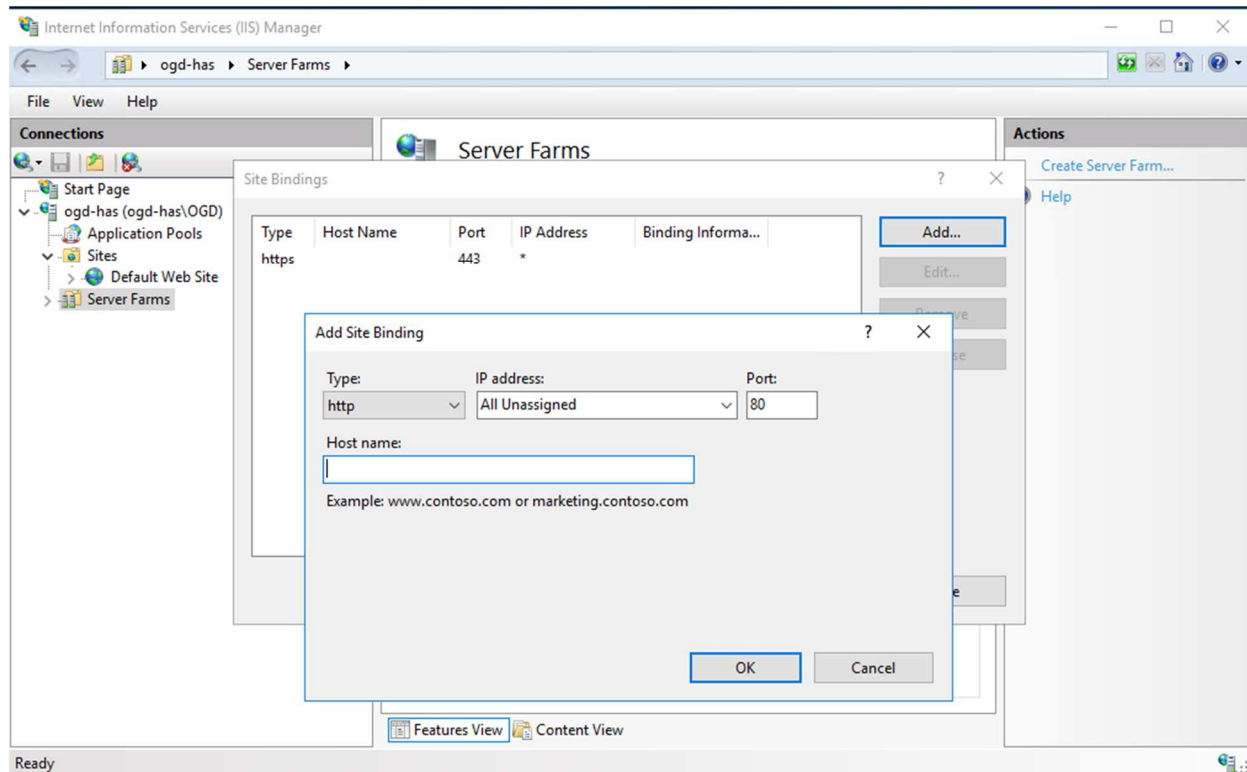
an HTTPS configuration, see section 2.5.2 [Configuring HTTPS port 443](#).

2.5.1. Configuring HTTP port 80

To perform an **HTTP** configuration (if not already configured):

1. Click **Add** (or click **Edit** on existing 80).
 - In the **Type** field, select "http".
 - In the **IP address** field, select "All unassigned".

- In the **Port** field, enter: "80".



2. Click **OK**.

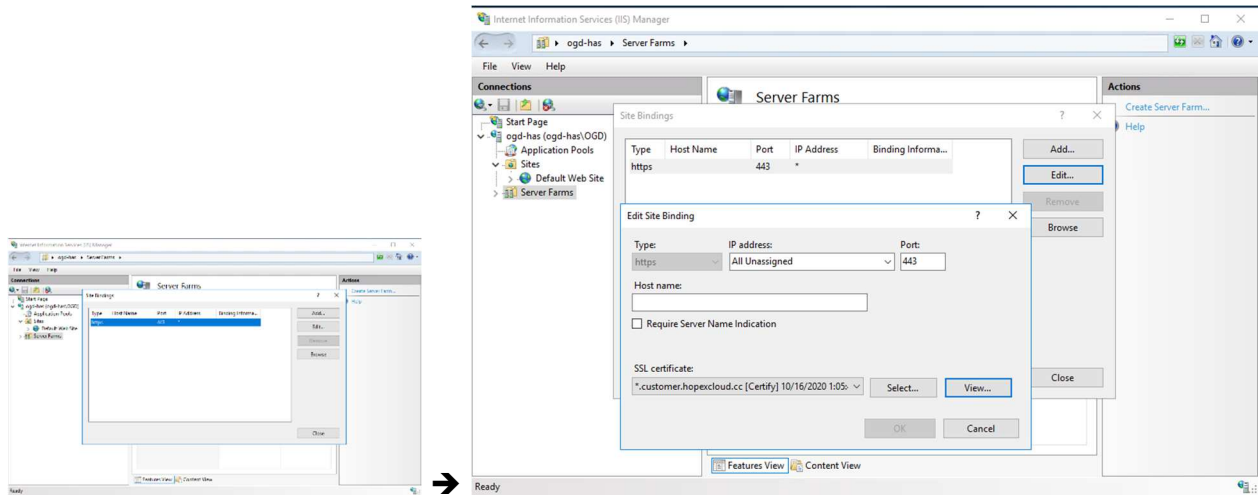
3. Click **Close**.

In that context, remove existing HTTPS.

2.5.2. Configuring HTTPS port 443

To perform an **HTTPS** configuration (if not already configured):

1. Click **Add** (or click **Edit** on existing 443).
2. In the **Type** field, select "https".
3. In the **IP address** field, select "All unassigned".
4. In **Port** field, enter: 443.
5. Click **OK**
6. Select appropriate **SSL Certificate**. (the one imported from above step 2.1 Adding SSL Certificate)
7. Click **Close**.

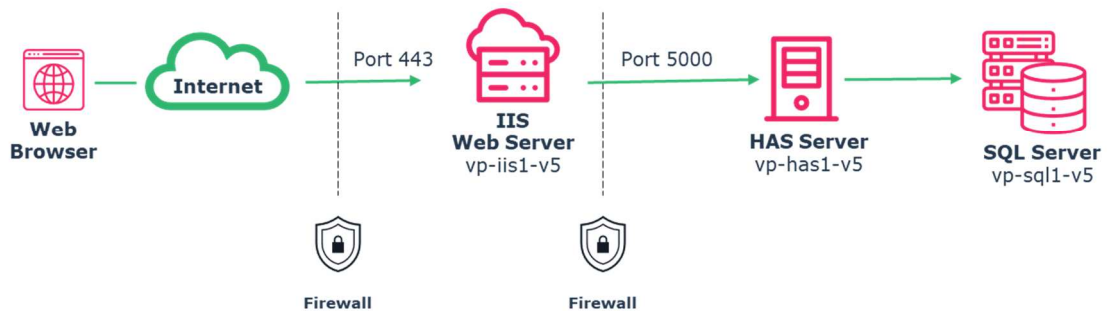


8. In that context, remove existing HTTP.

2.6. Configuring Server Farm - ARR

ARR will allow to redirect the request send to the "IIS Server" to the "HAS Server".

<https://vp-iis1-v5.fr.mega.com>



In that configuration there is:

One public URL DNS that will be <https://vp-iis1-v5.fr.mega.com>

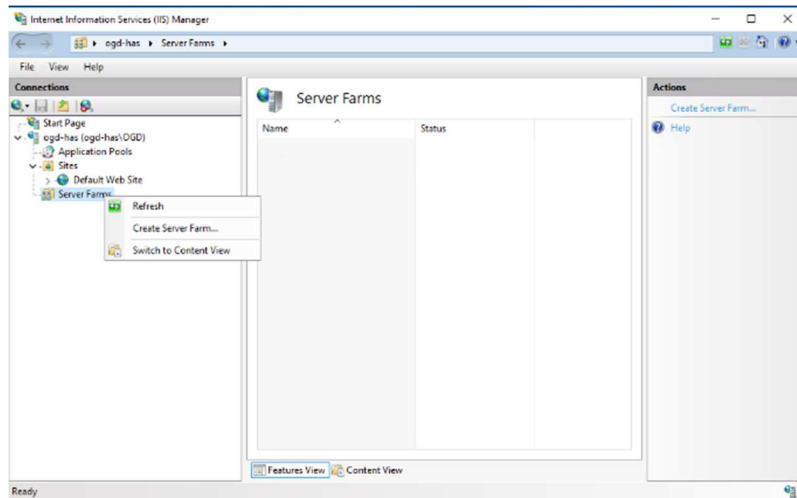
One HAS Server named "vp-has1-V5" installed on port 5000.

You need to adjust the following instruction to your own URL and server name.

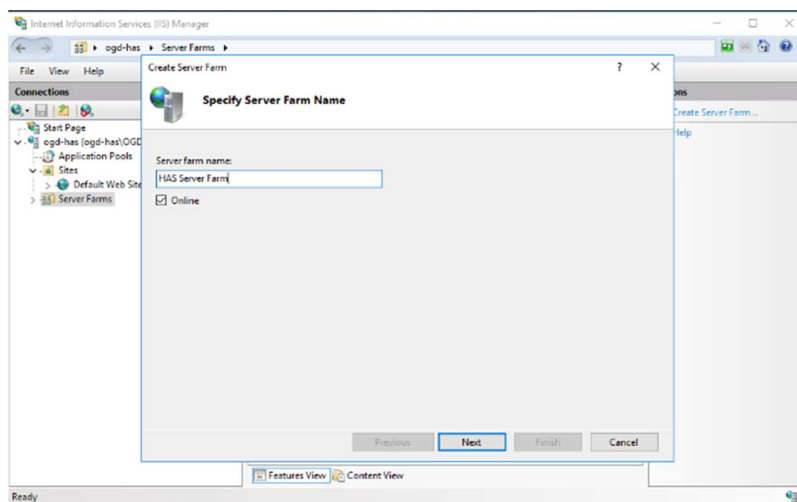
2.6.1. Creating a Server farms

Even if you have a single server, perform the following:

1. Right-click the **Server Farm** root level and select **Create Server Farm**.

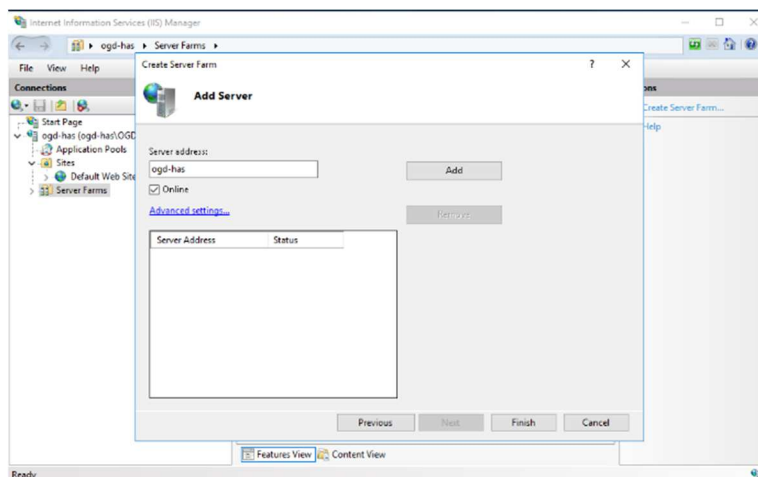


2. Enter a name to the server farm: for instance, "HAS Server Farm PROD".



If you have several instance, give an explicit name for the the farm
HAS Instance 1 – PROD - 5000
HAS Instance 2 – PRE-PROD 5001

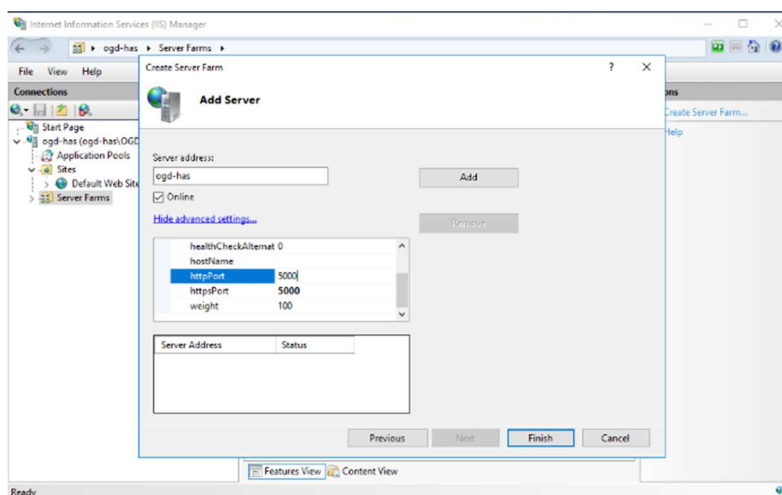
3. Click **Next**.
4. In the server address enter **the name of the server (entering an IP address is not supported)**. In that example: vp-has1-v5
5. Click **Advanced settings**.



6. . Scroll to **always put both port** (HTTP/HTTPS)

- **HTTP port**, enter 5000
- **HTTPs port**, enter 5000

7. Click **Add**.

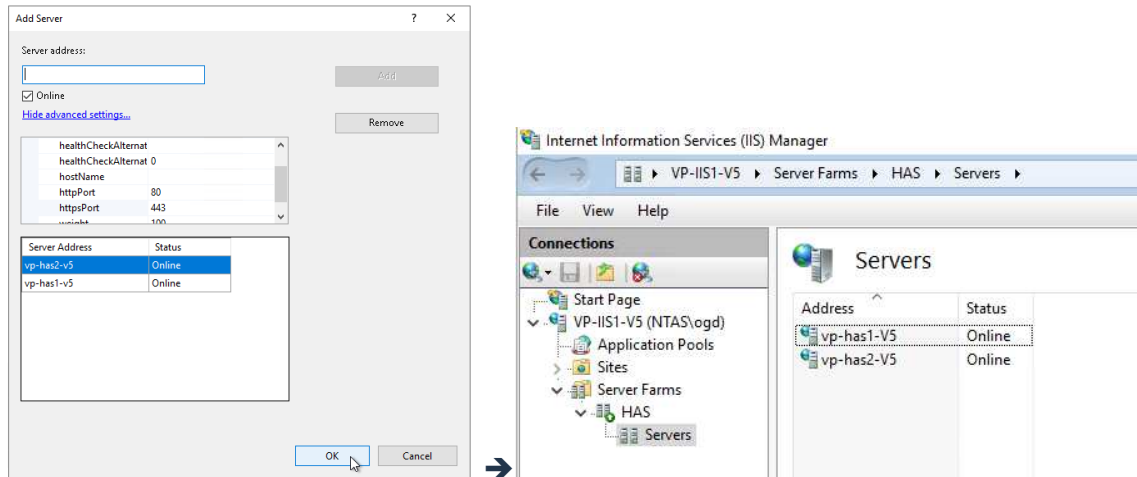


8. Repeat this operation **for each HAS Server of the cluster**.

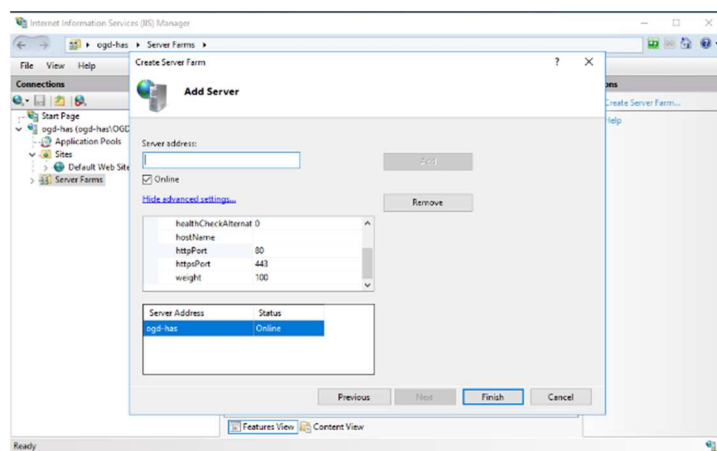
You now need to add each server of the cluster. If you have a single server for HAS then you need to put this server.

Example: with two HAS server names "vp-has1-v5" and "vp-has2-v5".

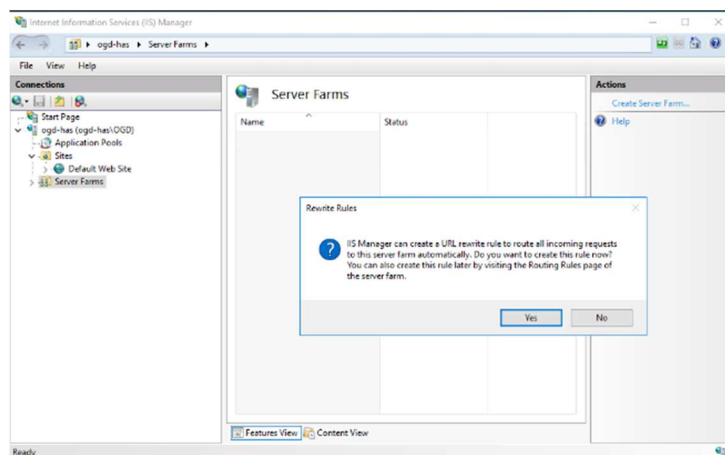
HOPEX Application Server – Installation Guide



9. Click **Finish**.



10. When prompted click **Yes** to create the URL Rewrite rule.

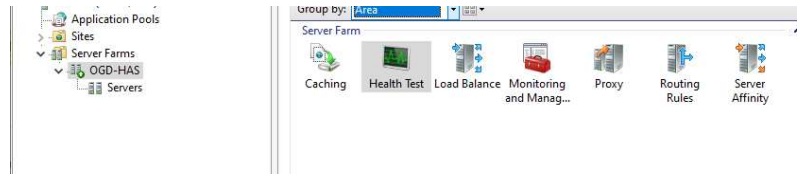


If you do not get prompted to create the URL Rewrite rule it means URL rewrite might not be installed. You must install it and then create the rule manually.

2.6.2. Configuring the Health Test

To configure the Health Test:

1. Select the Server Farms you have just created.
2. Double-click **Health Test**.

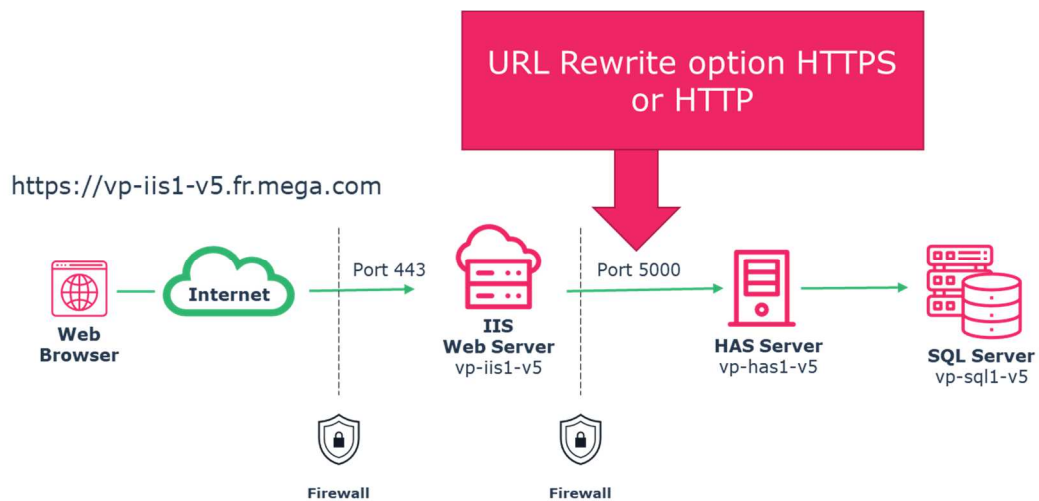


3. In the input URL add the server URL:

Always write "localhost" regardless of your public URL/DNS.

- HTTP: <http://localhost/admin/cluster/node/health>
- HTTPS: <https://localhost/admin/cluster/node/health>

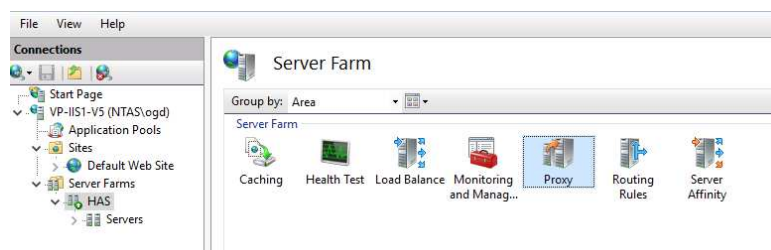
Choose HTTP or HTTPS depending on how the instance node has been configured. See corresponding chapter for more details "4 SSL Certificates configuration"



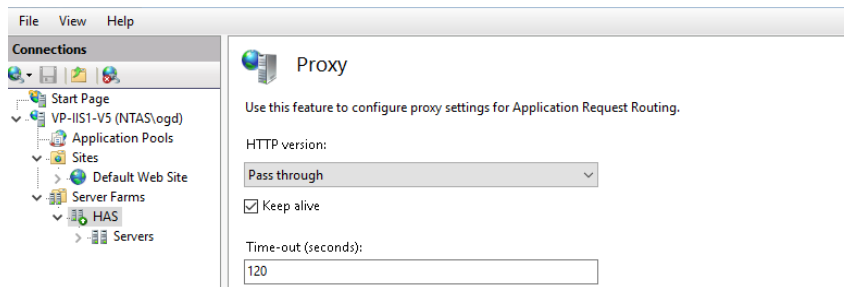
2.6.3. Configuring the proxy timeout

To configure the timeout:

1. Select the Server Farms you have just created.
2. Double-click **Proxy**.



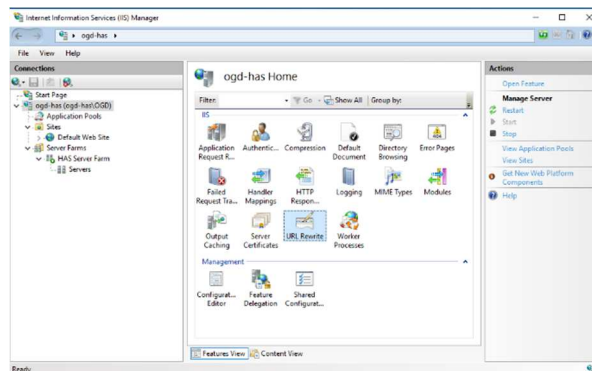
3. In the input Time-out write **120**, then Apply. 120s is the max do not put above.



2.6.4. Configuring the URL Rewrite rule

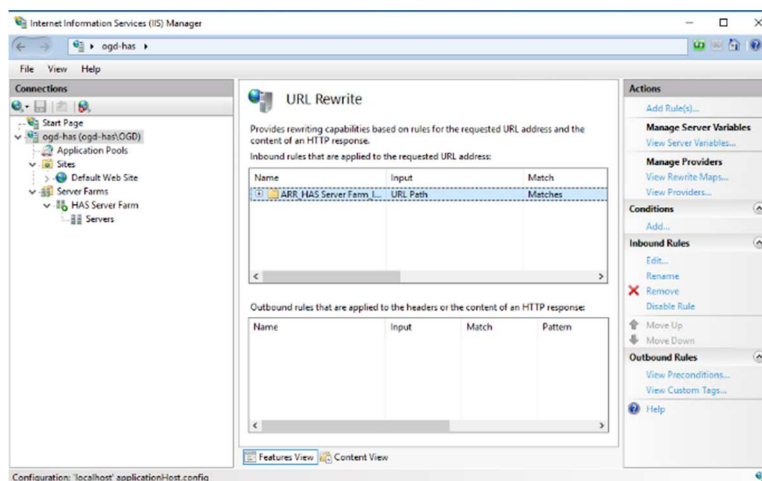
You need to adjust the URL Rewrite rule that was created:

1. Click the IIS root level.



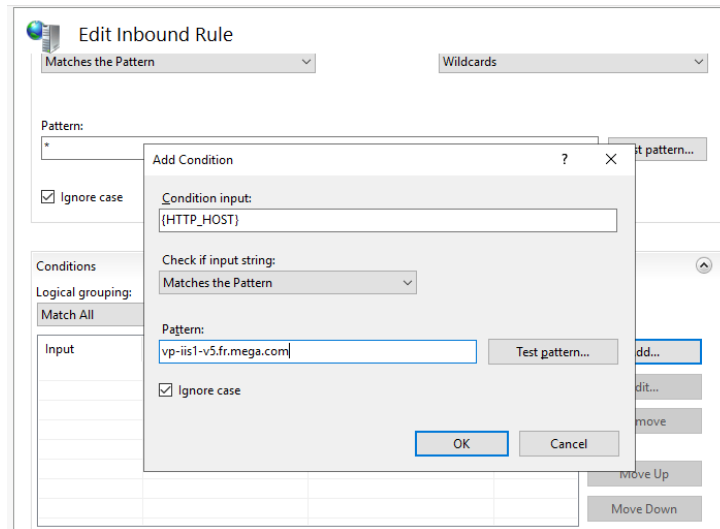
2. Double-click **URL Rewrite**.

The rewrite rule created is named "ARR_ server farm name".



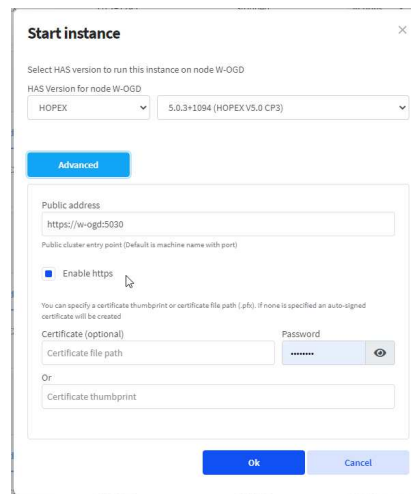
3. Select the rule and double-click it (or click Edit).
4. Expand **Conditions** section to add one:
 - Click **Add**.
 - In the **Condition input** field, enter {HTTP_HOST}

- Select “Matches the Pattern”
- In the **Pattern** field, enter the DNS of your URL. Example « vp-iis1-V5.fr.mega.com »



5. Scroll down to the **Scheme** drop-down menu:

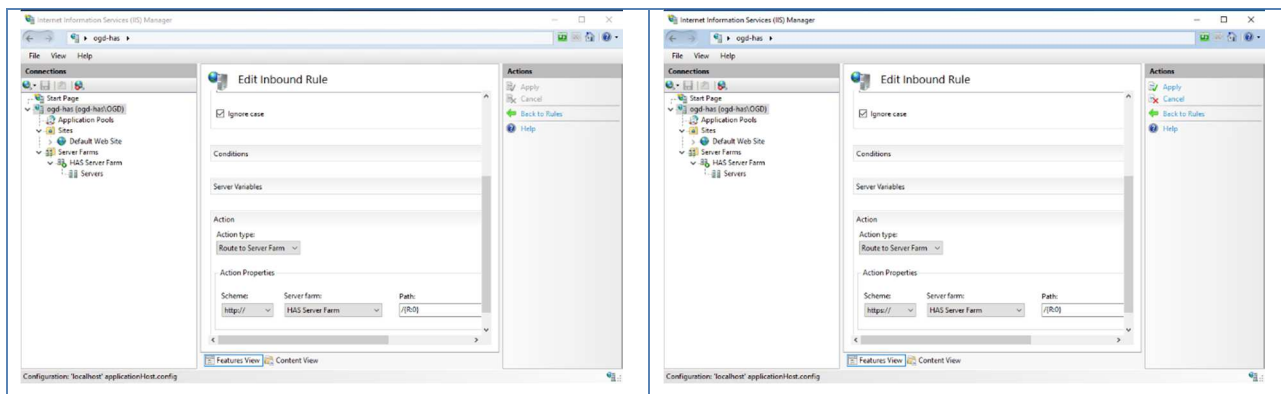
You will be able to decide this on the Instance Manager in the following chapter. If you have selected “**Enable https**” between cluster then select HTTPS else select HTTP.



- Select **HTTPS (443)** if you are securing the URL
- Select **HTTP (80)** if you are not securing the URL

HTTP

HTTPS (preferred choice)



6. Click Apply.

CAUTION: There are 2 areas where you defined HTTP and HTTPS. This option is the communication between IIS and HAS

2.7. Request Filtering

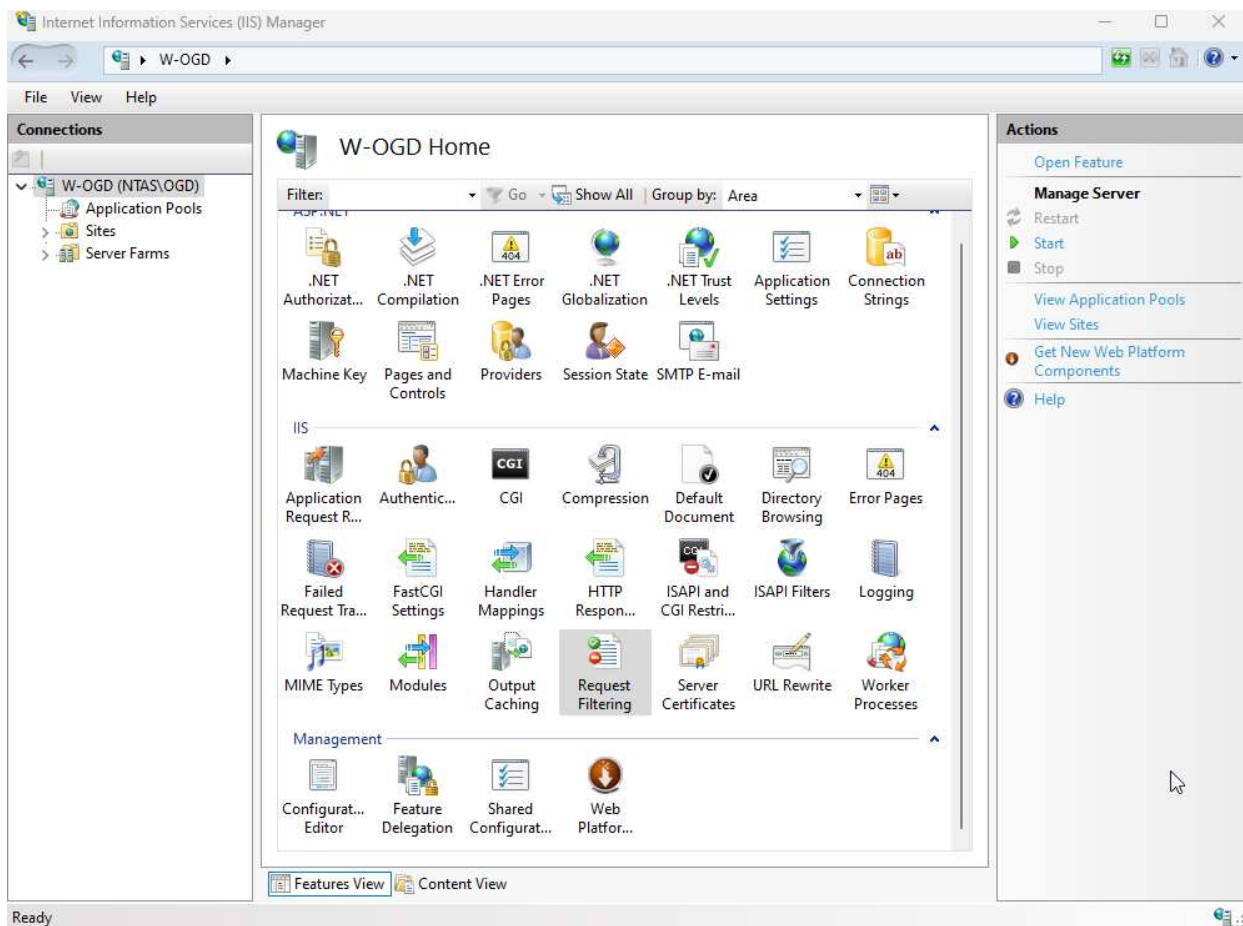
You need to adjust the Request filtering rules in IIS. Make sure that:

- there is no URL request filtering.
- there is no HTTP Verbs request filtering.
- there is no header request filtering.
- there is no query string request filtering.

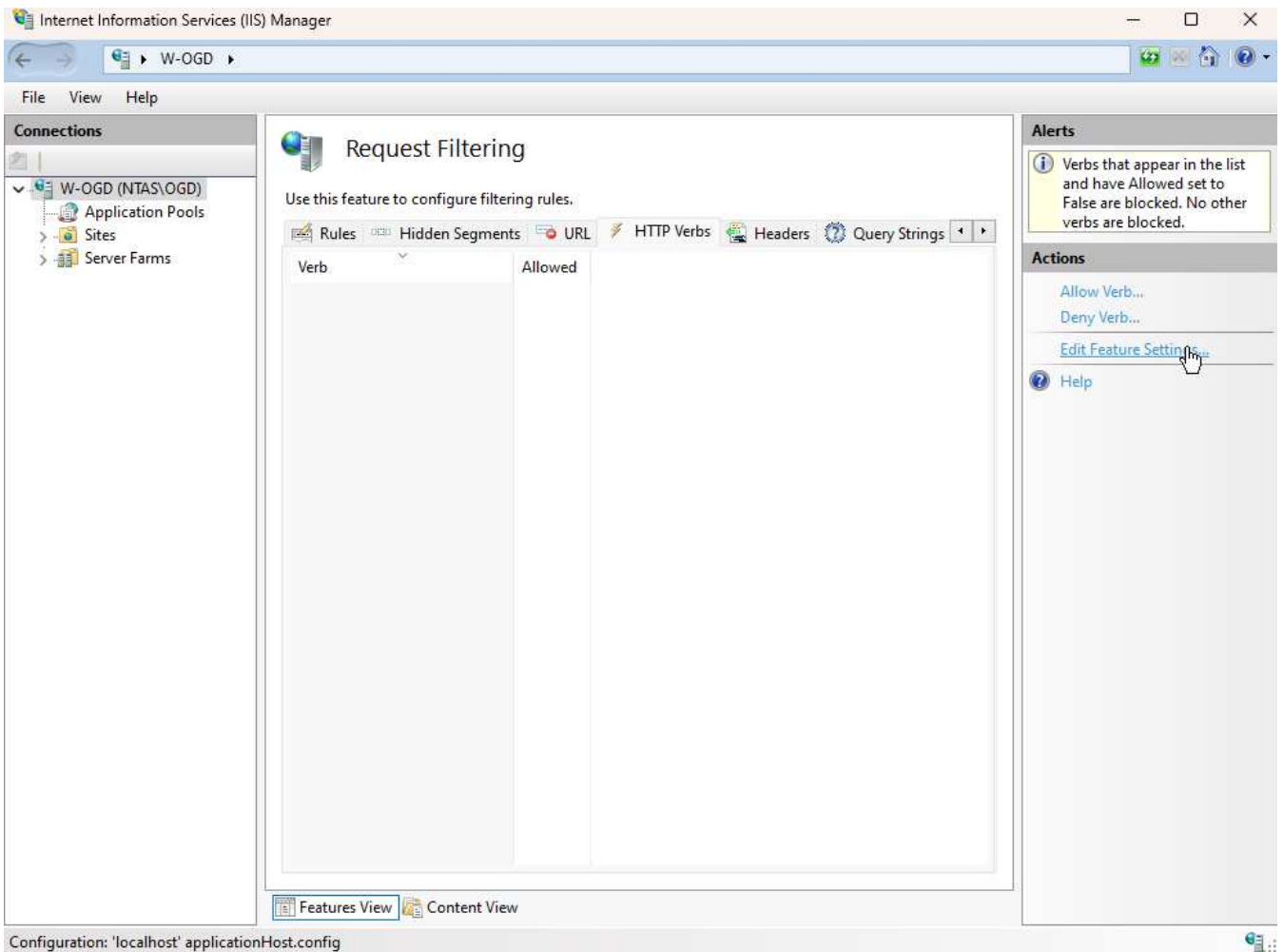
Having value in any of this tab of IIS may interfere with HOPEX and prevent it from working properly. All security aspect of this request filtering are already managed by HAS.

You must Edit feature settings:

1. On root level select Request Filtering.

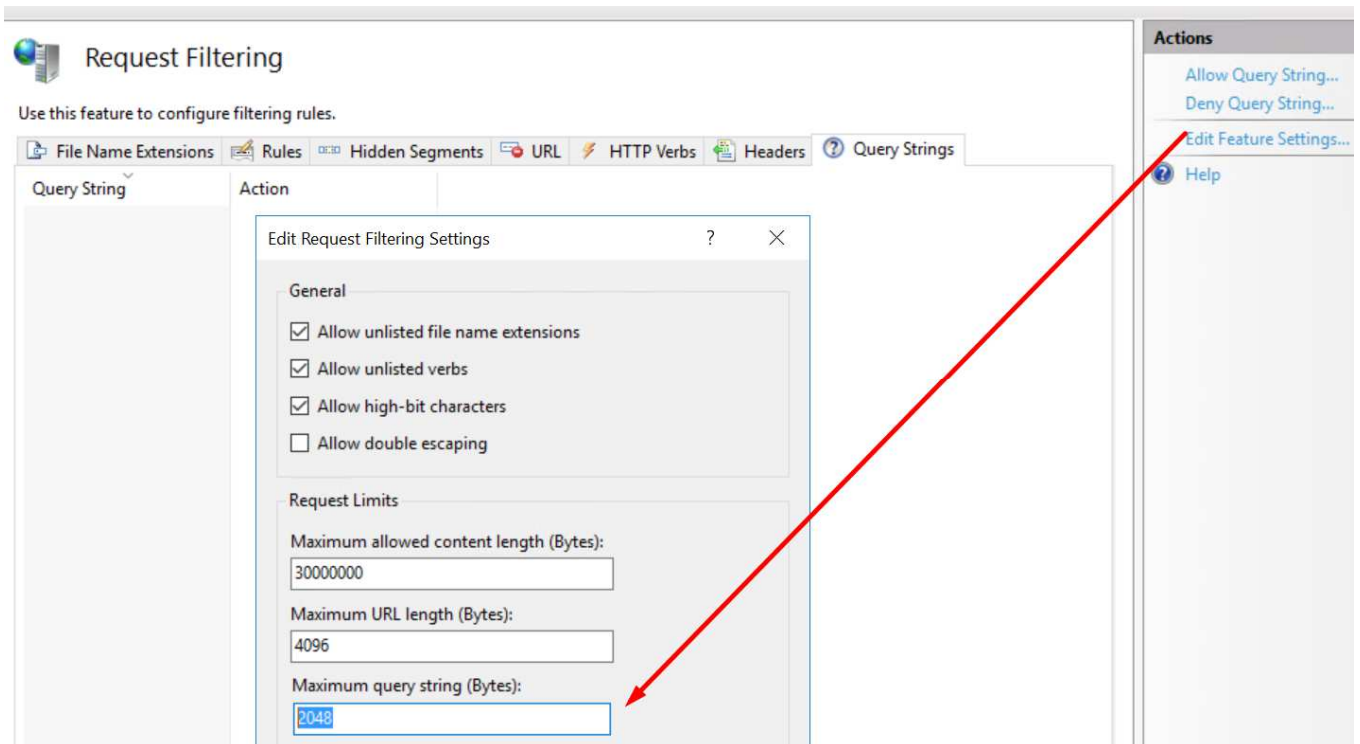


2. Click **Edit Feature Settings** (located in the right pane)



3. Increase default value 2048.

- Maximum query string (Bytes): **9012**

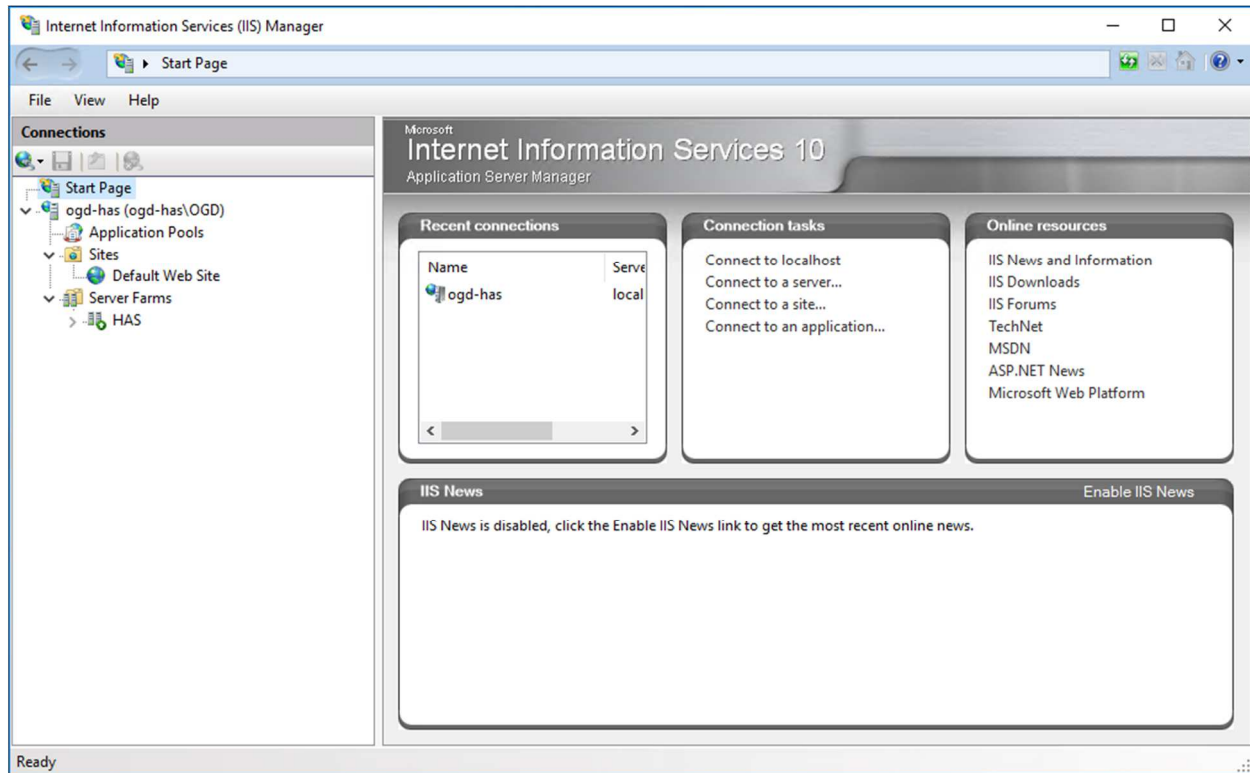


2.8. Configuring Logs files details and location

The following steps are “**optional**”. They are here to ease:

- diagnosis with complementary logs
- move location of all IIS logs

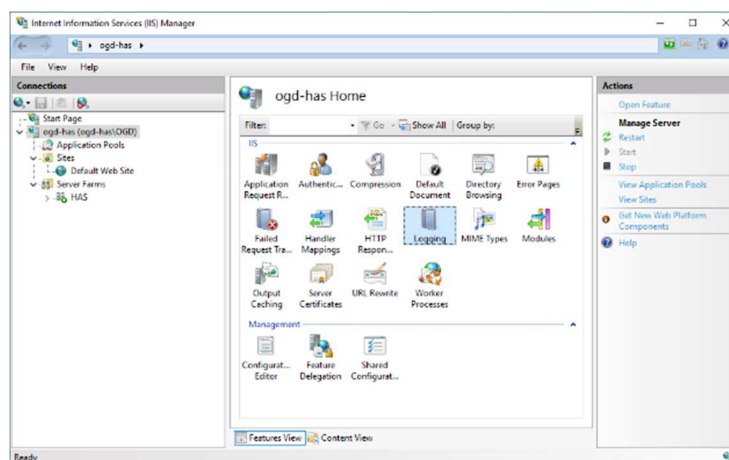
Launch the IIS Management Console



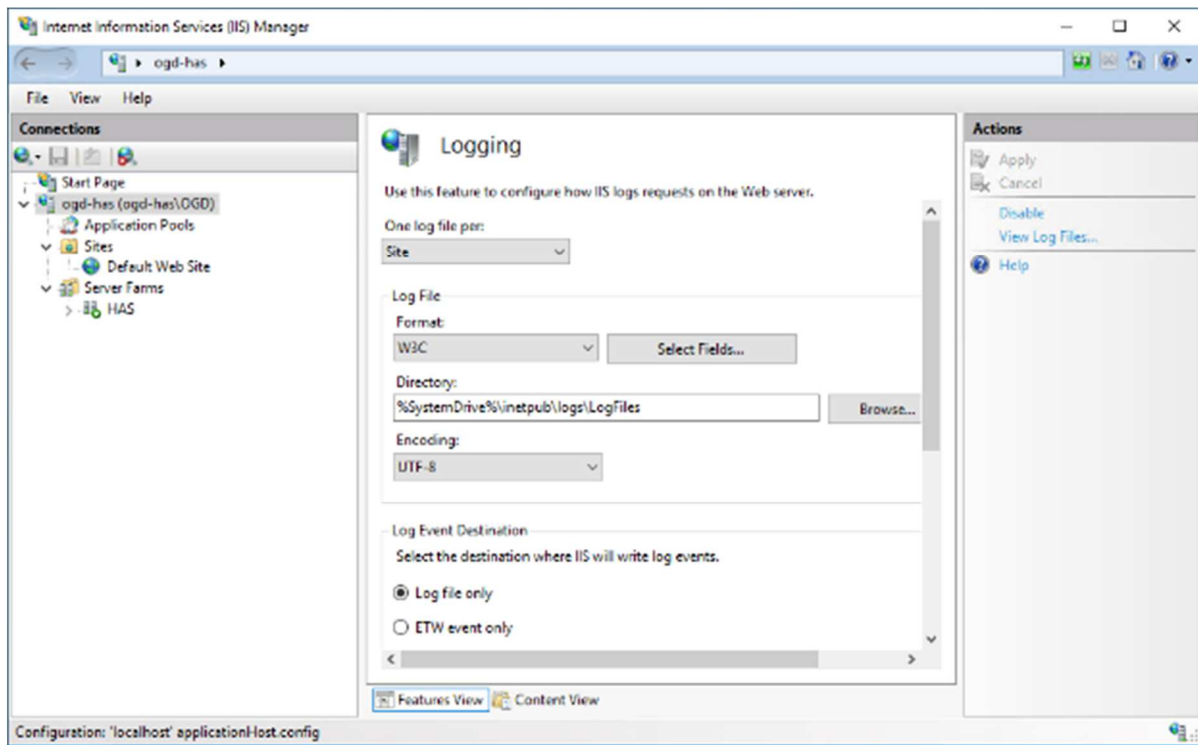
2.8.1. Locating IIS Logs

To locate IIS logs:

1. Select the Root level of the IIS Server.



2. Double-click **Logging**.

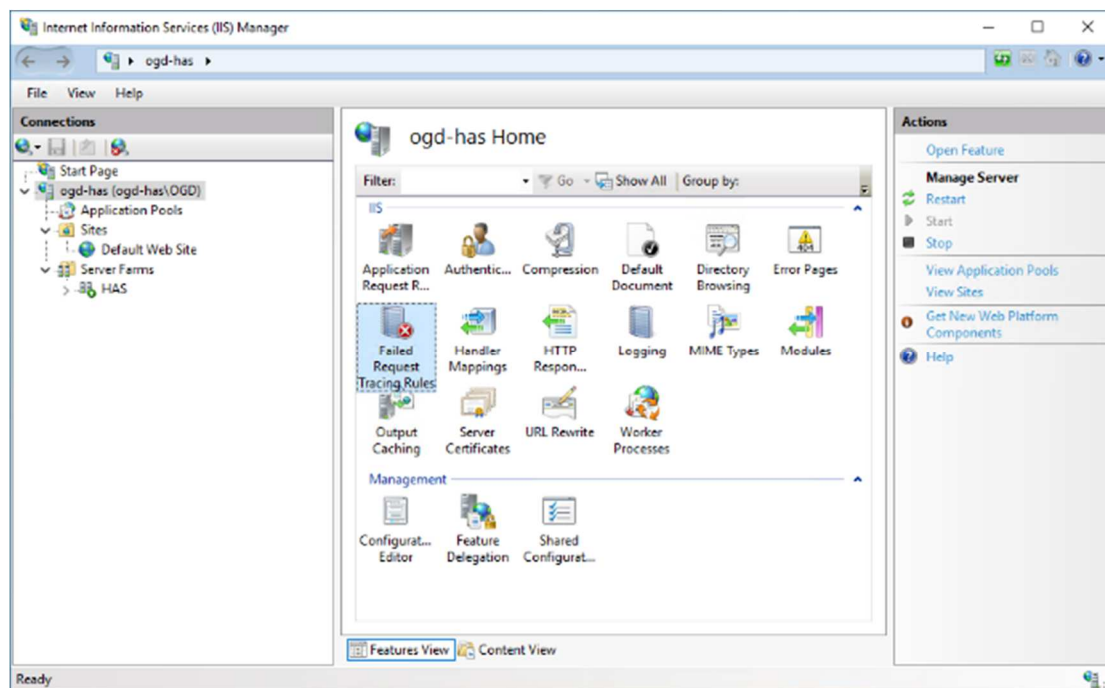


3. In the **Logging** pane, adjust **Directory location** of logs.

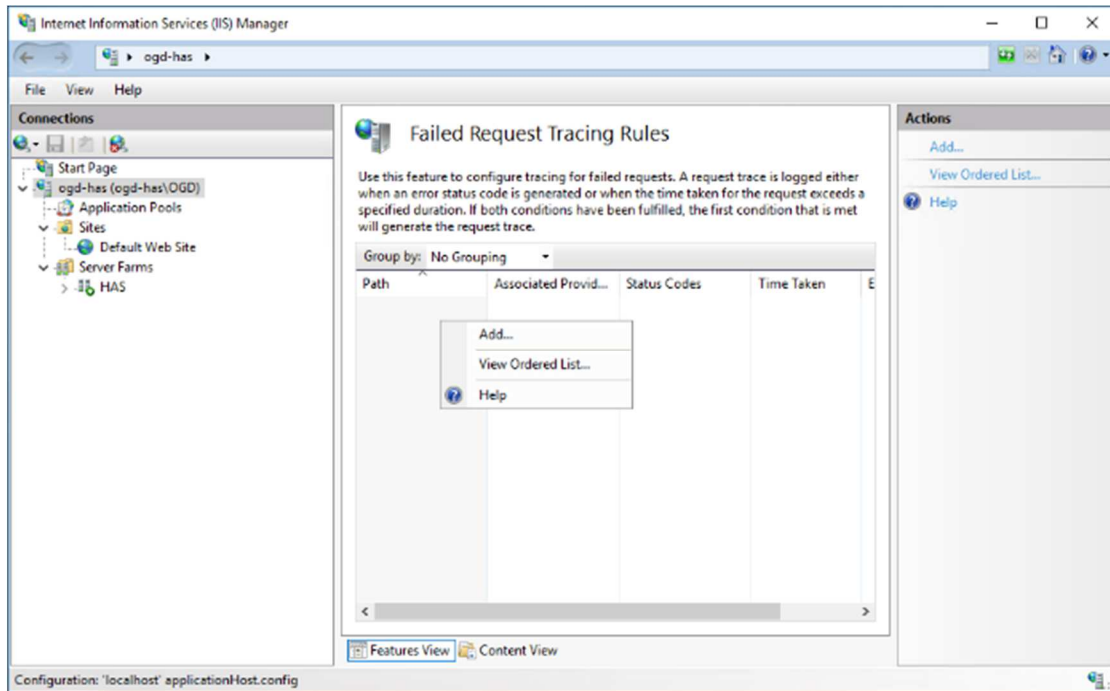
2.8.2. Enabling detailed logs for HTTP status code 502

To enable detailed logs for HTTP status code 502:

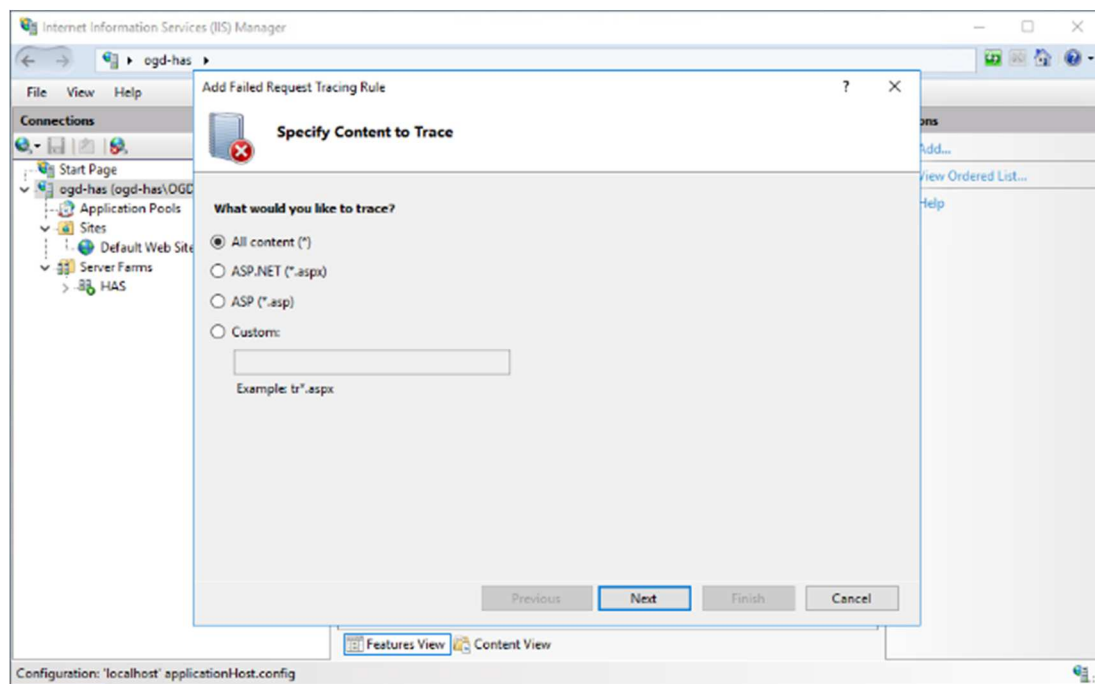
1. Go to Root level.



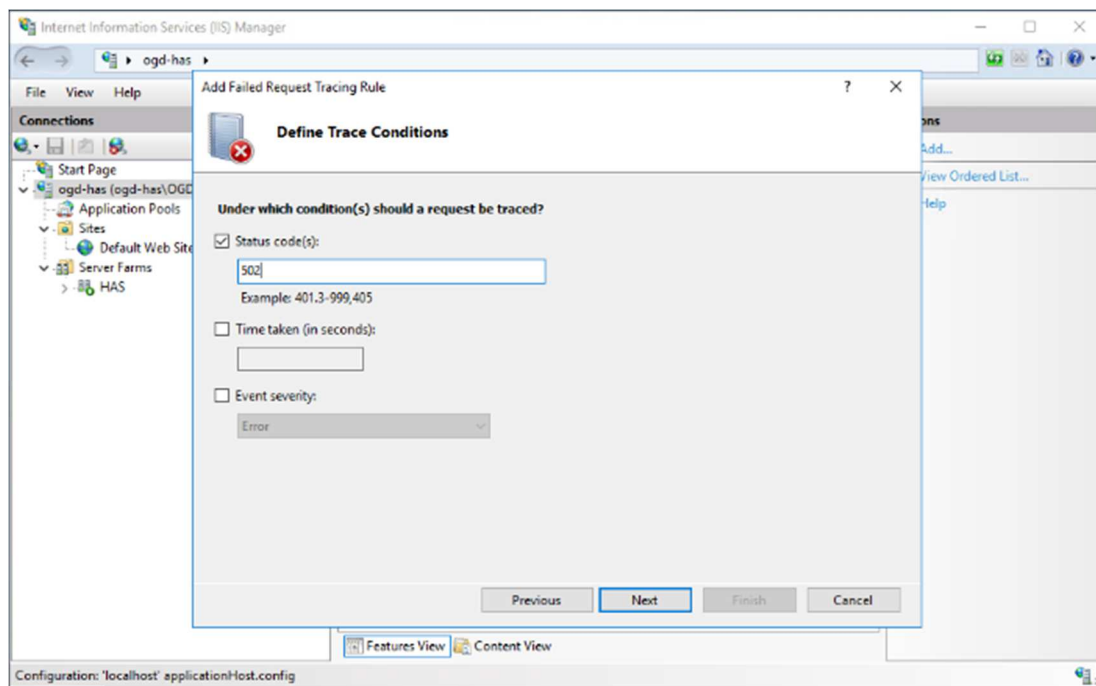
2. Double-click **Failed Request Tracing Rules**.



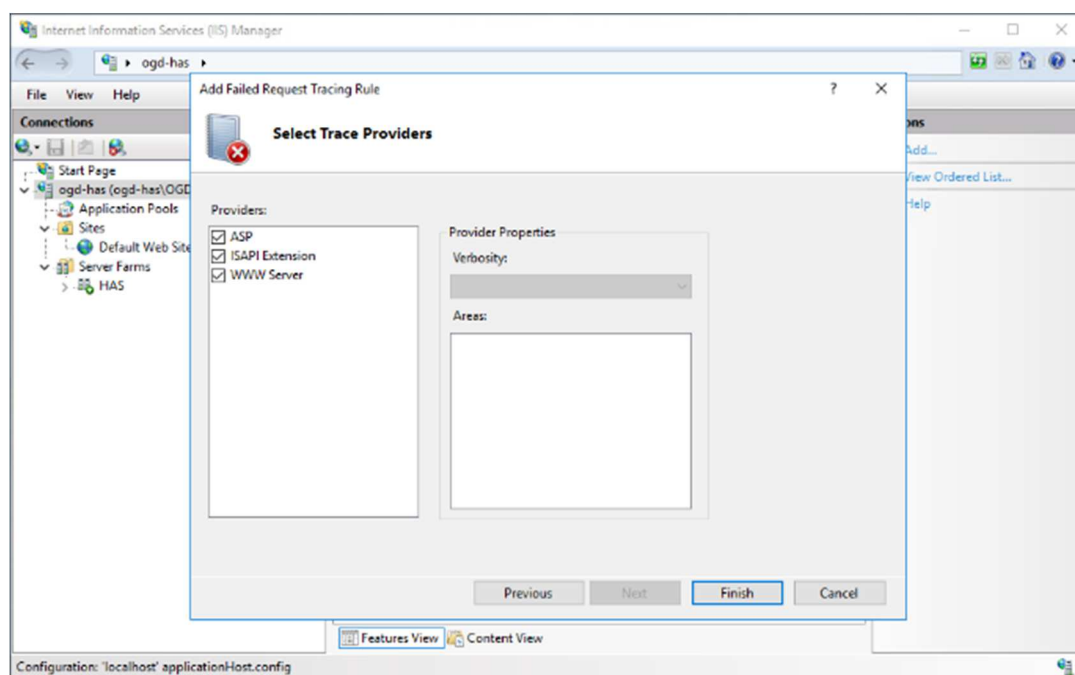
3. Right-click the list, and select **Add**.



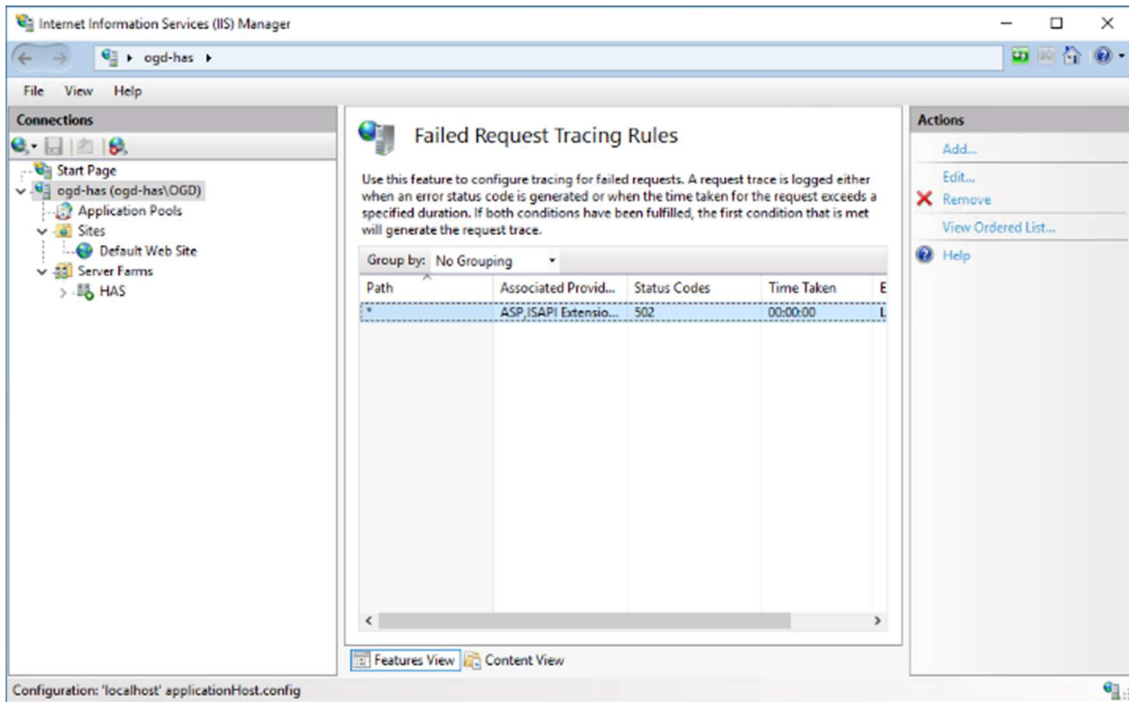
4. In the **Add Failed Request Tracing Rule**, select **All Content** and click **Next**.



5. Select **Status Code** and in the field enter "502" then click **Next**.



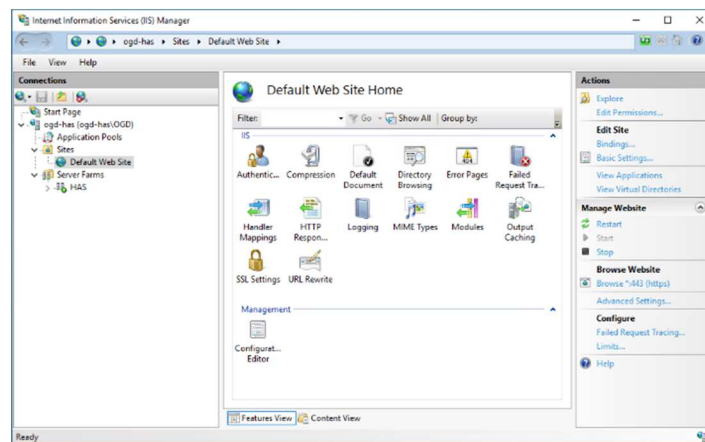
6. Click **Finish**.



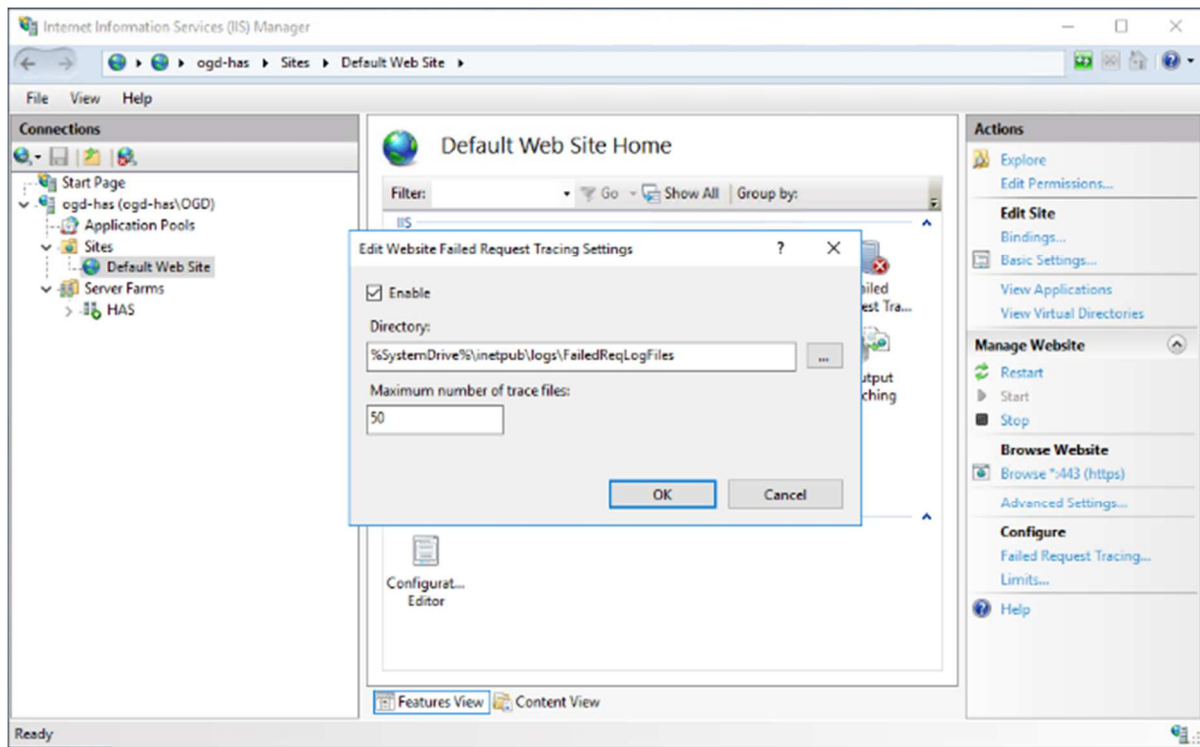
The rule for tracing HTTP 502 errors is now added. You must now enable the Tracing logs.

To enable the Tracing logs:

1. Go to **Default Web Site**.



2. In the **Actions** pane, **Manage Website** > **Configure** section, click **Failed Request Tracing**.
3. In the **Edit Website Failed Request Tracing Settings** window, select **Enabled**.
4. (If needed) In the **Directory** field, modify folder location. Default: %SystemDrive%\inetpub\logs\FailedReqLogFiles.
5. Adjust **Maximum number of trace files**. Default 50.
6. Click **OK**.

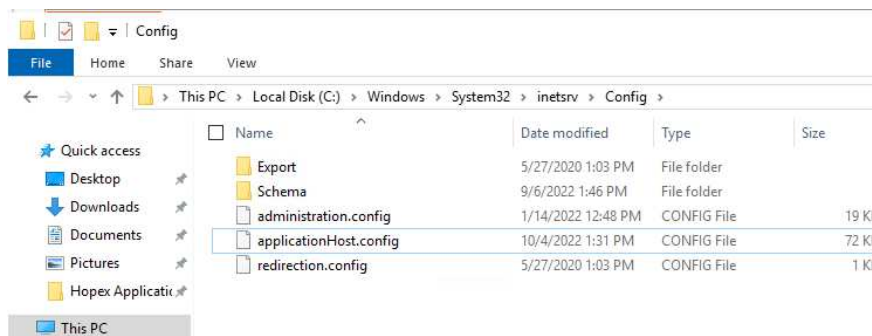


2.8.3. Checking configuration (optional)

The server farm and healthcheck configuration you did are stored by IIS in an XML file in Microsoft. This file is called **applicationHost.config**.

You can find this file here: %windir%\system32\inetsrv\config

1. Access the applicationHost.config file.



2. Go at the end of the file or search for your server name and port.
3. You can check here the port you have selected and healthcheck url.

```

C:\Windows\System32\inetsrv\Config\applicationHost.config - Notepad++ [Administrator]
File Edit Search View Encoding Language Settings Tools Macro Run Plugins Window ?
applicationHost.config
954 <add name="CGI-exe" path="*.exe" verb="*" modules="CgiModule" resourceType="File" requireAcc
955 <add name="TRACEVerbHandler" path="*" verb="TRACE" modules="ProtocolSupportModule" requireAc
956 <add name="OPTIONSVerbHandler" path="*" verb="OPTIONS" modules="ProtocolSupportModule" requi
957 <add name="ExtensionlessUrlHandler-ISAPI-4.0_32bit" path="*" verb="GET,HEAD,POST,DEBUG" moc
958 <add name="ExtensionlessUrlHandler-ISAPI-4.0_64bit" path="*" verb="GET,HEAD,POST,DEBUG"
959 <add name="ExtensionlessUrlHandler-Integrated-4.0" path="*" verb="GET,HEAD,POST,DEBUG"
960 <add name="StaticFile" path="*" verb="*" modules="StaticFileModule,DefaultDocumentModule,Dir
961 </handlers>
962 </system.webServer>
963 </location>
964 <webFarms>
965 <webFarm name="HAS" enabled="true">
966 <server address="vp-has1-v5" enabled="true">
967 <applicationRequestRouting httpPort="5000" httpsPort="5000" />
968 </server>
969 <server address="vp-has2-v5" enabled="true">
970 <applicationRequestRouting httpPort="5000" httpsPort="5000" />
971 </server>
972 <applicationRequestRouting>
973 <protocol timeout="00:02:00" />
974 <healthCheck url="https://localhost/admin/cluster/node/health" />
975 </applicationRequestRouting>
976 </webFarm>
977 <applicationRequestRouting>
978 <hostAffinityProviderList>
979 <add name="Microsoft.Web.Arr.HostNameRoundRobin" />
980 </hostAffinityProviderList>
981 </applicationRequestRouting>
982 </webFarms>

```

For more details read the Microsoft official documentation:

<https://learn.microsoft.com/en-us/iis/get-started/planning-your-iis-architecture/introduction-to-applicationhostconfig>

3. HOPEX Application Server (HAS) installation

The following installation instructions are to be applied for the First server of the farm that will behave as an "**HAS Server**".

Should you have several "HAS Server" you need to add each additional HAS Server to the cluster. Please read the cluster section.

3.1. Installing the prerequisite software

Download and install this prerequisite software technologies:

A supported web browser: Chrome, Firefox, Edge

.Net 6 Hosting Bundle x64 (latest version as more secure):

<https://dotnet.microsoft.com/download/dotnet/6.0>

. Net 6 SDK x64 (for Development server only)

.Net Framework 4.8:

<https://dotnet.microsoft.com/download/dotnet-framework>

Visual C++ Redistributable 2015 – 2022 64 bits

o vc_redist.x64.exe

<https://support.microsoft.com/en-us/help/2977003/the-latest-supported-visual-c-downloads>

ODBC Driver 17 or 18 for SQL Server X64 too if the SQL Server database is not on the same physical Windows than HAS Server.

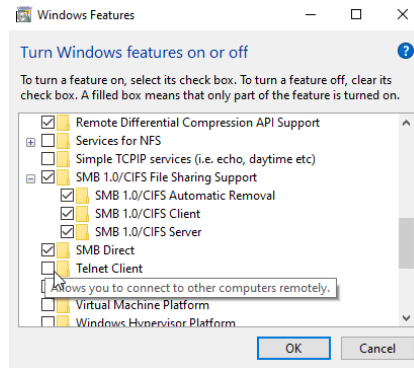
<https://docs.microsoft.com/fr-fr/sql/connect/odbc/download-odbc-driver-for-sql-server?view=sql-server-ver16>

CAUTION: ²ODBC Driver 18 is supported from V5 CP4 onward.

3.2. Configuring the file server

1. In Windows Operating System turn on File Server and SMB:

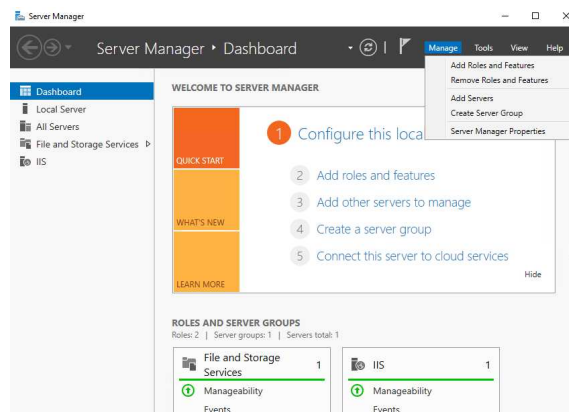
With Windows 10: from **Control Panel**: “Turn Windows features on or off”



Or

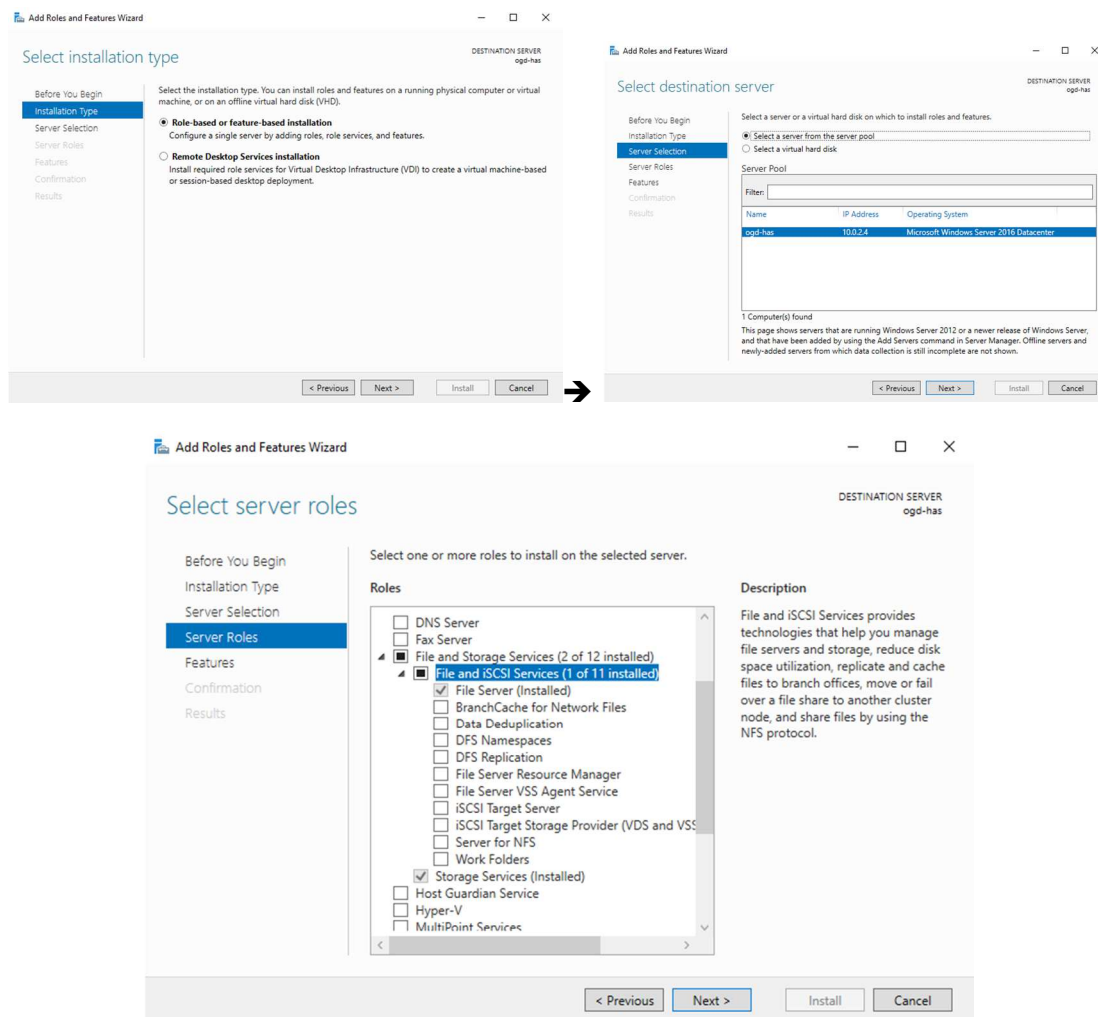
With Windows Server: from **Server Manager**: Add Roles and features
(<https://docs.microsoft.com/en-us/windows-server/administration/server-manager/server-manager#start-server-manager>)

2. Click **Manage** and select **Add Roles and features**.



3. In the pop-up Wizard, click **Next**.
The **Server Roles** page is displayed.
4. Select: **File Server**.
5. If prompted click **Add Features**.

HOPEX Application Server – Installation Guide

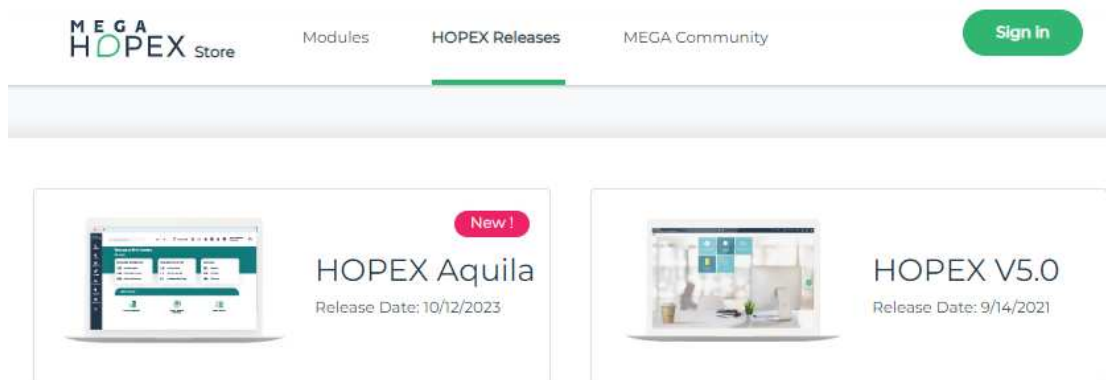


6. Click **Next** up to install.

3.3. Downloading HAS Server installer

To download the latest installer from a server/laptop that has access to internet:

1. Go to <https://store.mega.com/>.




2. In the **HOPEX Releases** page, click **HOPEX V5.0**.



3. Click **Download installer**.

The Setup file is downloaded.

 Hopex.Application.Server-1.0.118.Setup.exe

You do not need to be authenticated to download the installer.

3.4. Getting your installation key

To get your “personal” installation key:

1. Go to <https://store.mega.com/>.
2. Click **Sign in**.
3. If you have **never connected** to any MEGA website (MEGA Community, MEGA HOPEX Store, MEGA e-learning platform).

- Click “Don't have an account? **Sign up**”
- Create an Account.
- Set a new password.
- Confirm your account by clicking the email received.

If you **have already an account** on MEGA website:

- Connect with your professional e-mail and password.

4. Click your **Avatar > My Profile** to get your own personal installation key.

5. Copy the **Installation Key**.

If you fail in this process and encounter an “Access Denied”, contact your sales representative.



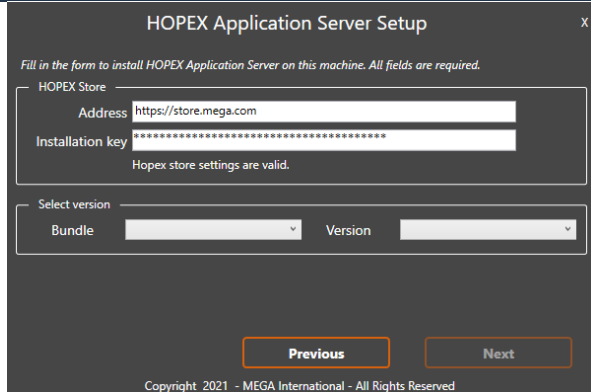
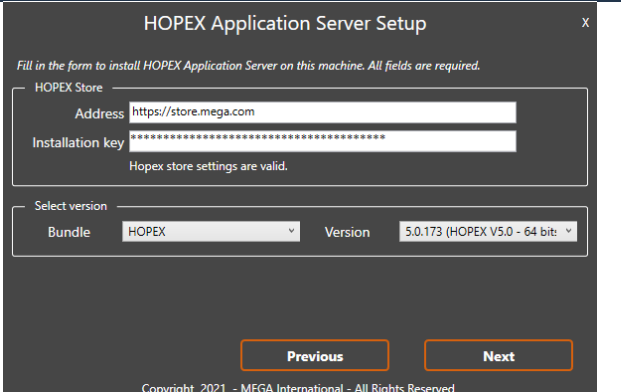
DO NOT SHARE this installation key. It is private for your organization.

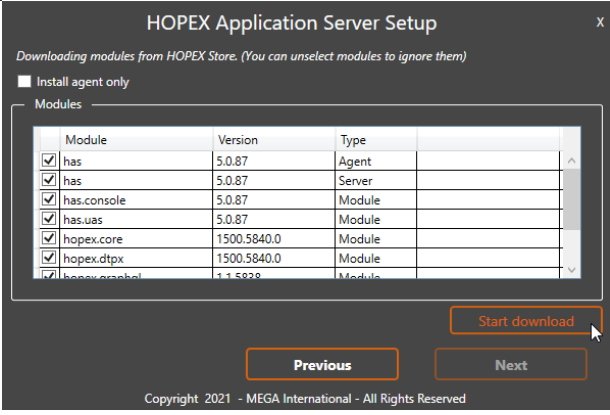
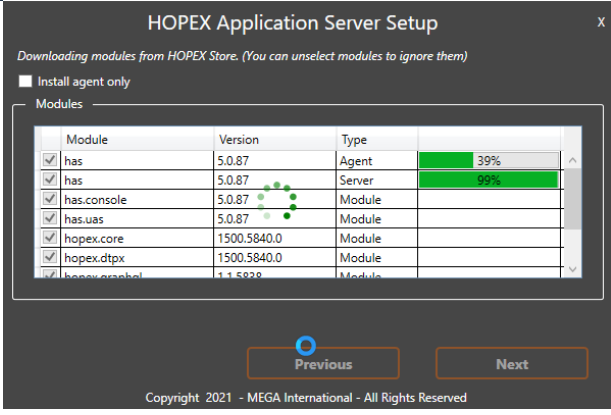
3.5. Installing HAS Instance Manager with the setup

3.5.1. First steps “online”

Launch the installer: double-click the “**Hopex.Application.Server-1.0.X.Setup.exe**”

Caution: this action must be done from a server that has online internet access to <https://store.mega.com/> You can go offline later

Step 1	Step 2
	<ul style="list-style-type: none"> • Check Accept license. • Click Next
 <p>HOPEX Application Server 1.0.70</p>	
Step 3	Step 4
<ul style="list-style-type: none"> • Enter your Installation key obtained from the MEGA HOPEX Store <p>The message “HOPEX Store settings are valid” appears when the key is correct</p>	<ul style="list-style-type: none"> • Select Bundle “HOPEX” • Selection desired Version: 5.0 • Click “Next”
	

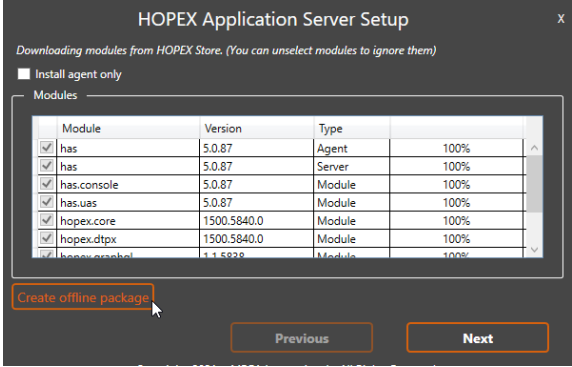
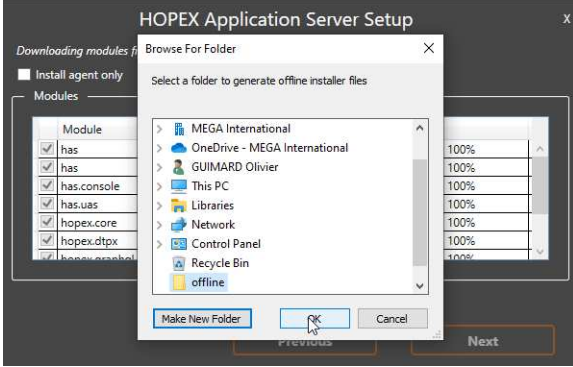
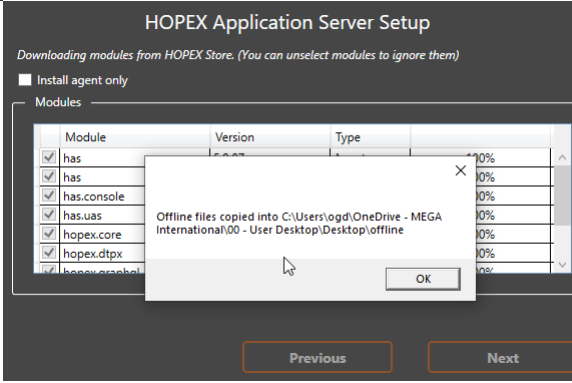
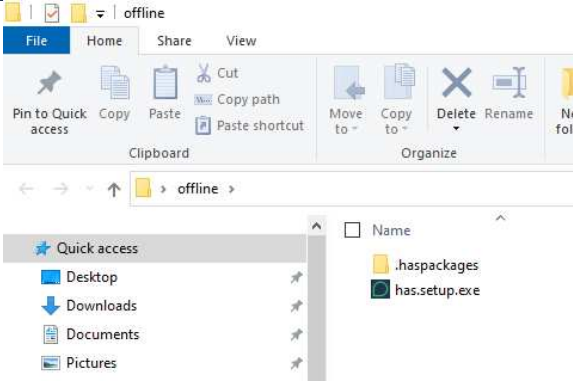
Step 5	Step 6
<ul style="list-style-type: none"> Select the module you want to download. By default "All" Click Start download <p>This may take a while. The total of all module can goes up to 2Gb.</p>	<ul style="list-style-type: none"> When all downloads are successful click "Next"
	

When you stop here nothing is installed on the server. Files are only downloaded to start deployment.

Now you can decide to:

- Go offline (step 7 to 10) if the server you want to install does not have internet access or if you want to keep the package for later use.
- Continue Setup (go directly to step 11)

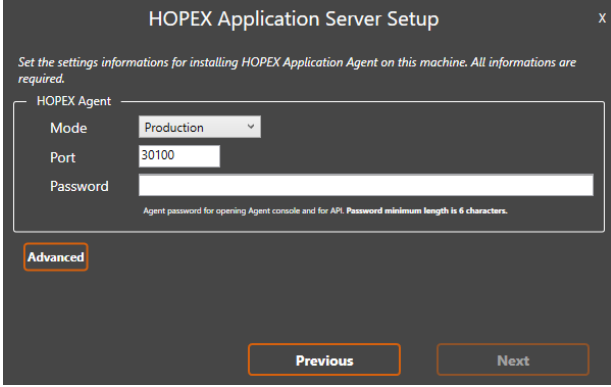
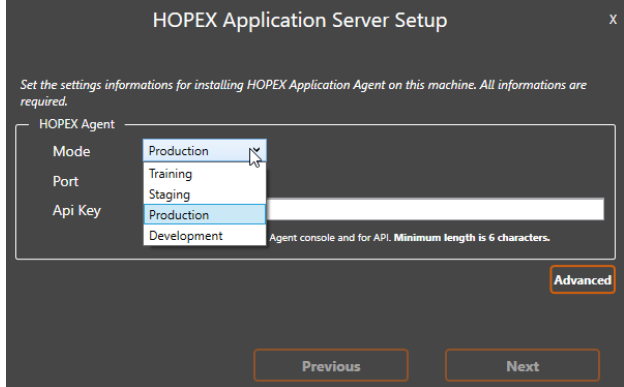
3.5.2. Go “offline”

<p>Step 7</p> <ul style="list-style-type: none"> Click the Create offline package Unfold the folder where you want to put the packages 	<p>Step 8</p> <ul style="list-style-type: none"> Prefer a C:\ location. You will be able to move the files later. Create a new folder or select an existing one for which you have the rights to write.
	
<p>Step 9</p> <ul style="list-style-type: none"> When successful a pop-up appears Offline files ready Click OK The setup is closed 	<p>Step 10</p> <ul style="list-style-type: none"> Search for the folder you have just created <p>It contains:</p> <ul style="list-style-type: none"> - an has.setup.exe file - an haspackages folder with *.haspkg file
	

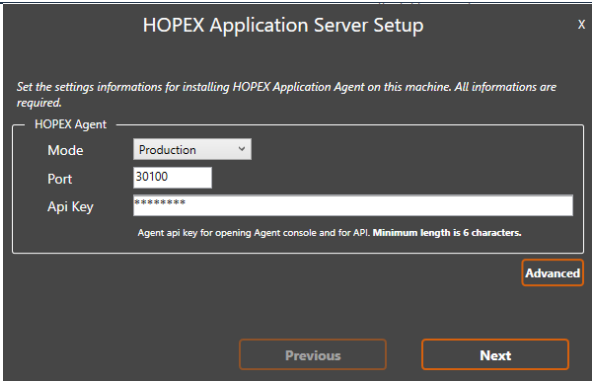
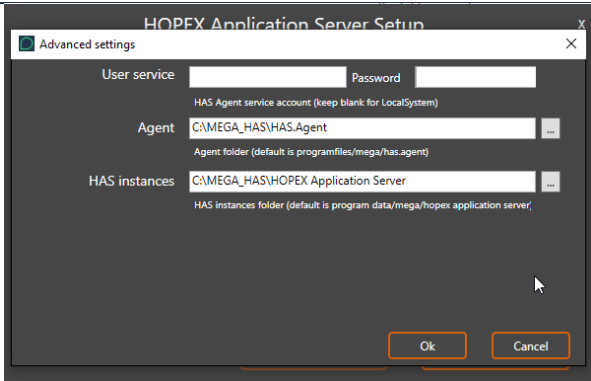
Caution: naming of folders and files should not be changed

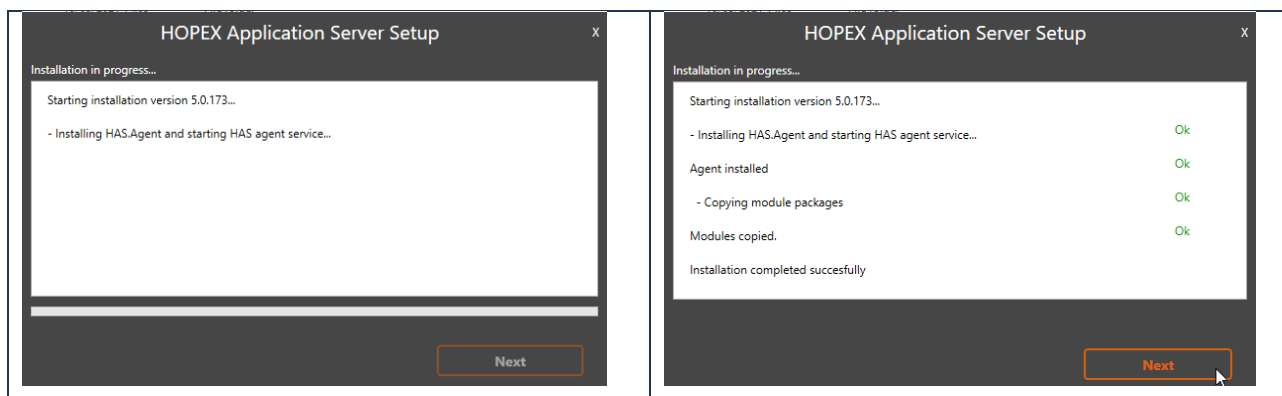
1. Copy this folder on the server where you want to continue the installation.
2. Double-click **has.setup.exe**.
3. Perform **step 1** and **step 2** again. You should arrive directly to **step 11**.

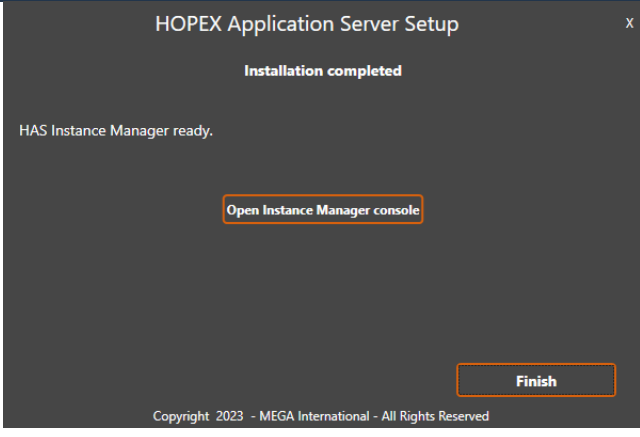
3.5.3. Continue setup

Step 11	Step 12
<p>You need to specify which server you are deploying:</p> <ul style="list-style-type: none"> • <u>Production</u>: for production server • <u>Staging</u>: for UAT and pre-production • <u>Training</u>: for training only • <u>Development</u>: for customization development 	<ul style="list-style-type: none"> • In the Mode drop-down menu select “Production” (or the other choice depending on what you are installing) • In port adjust port number. <u>Default</u> 30100 <p>Caution: do not use 80 or 443</p>
	

The Mode as an impact on modules you can deploy, features you can enable and default logs details

<p>Step 13</p> <ul style="list-style-type: none"> Give an API Key value for the HAS Instance Manager REST API and Web portal. This API Key is for server administrator only. <div style="background-color: #2c3e50; color: white; padding: 5px; text-align: center;"> Minimum 6 characters with capital letters and special characters </div> <p>You can change this API Key later if you forget it.</p>	<p>Step 14 (optional)</p> <ul style="list-style-type: none"> Should you want to change: <ul style="list-style-type: none"> Folder location <p><i>Default:</i> "C:\Program Files\MEGA" for HAS Instance Manager</p> <p>and "C:\ProgramData\MEGA" HAS for Instance</p> <ul style="list-style-type: none"> User to launch the windows service. <p>Required to access the Must License path or if there is more than 1 HAS Server</p> <p>See below 3.12 Windows User and access rights for more details</p> <p>In that case:</p> <p>Click Advanced</p> <ul style="list-style-type: none"> Adjust User service & password (if blank Local System is the default) Adjust Folder locations Click OK and Click Next
	
<p>Step 15</p> <p>The HAS Instance Manager is being installed and related packaged unzipped.</p>	<p>Step 16</p> <ul style="list-style-type: none"> When all successful (OK appears), click Next



Step 17	Step 18
<p>At that step, the process is being launched by Windows.</p> <p>A process called HAS.Instance.Manager.exe should be visible in Windows Task Manager.</p>	<ul style="list-style-type: none"> When ready, the "Open Instance Manager console" message appears. <p>Click it: it will open your web browser.</p>
	

The installation process with the setup is finished.

- Click **Finish**.

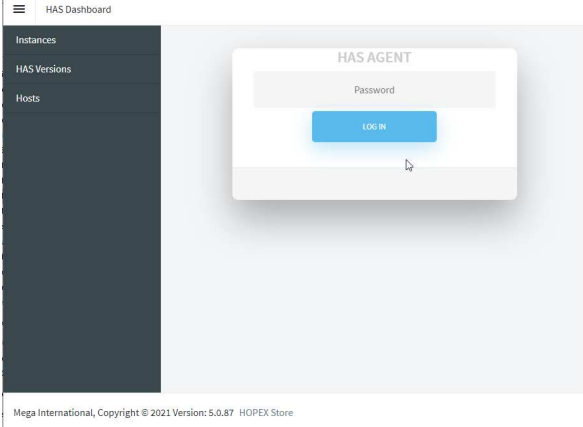
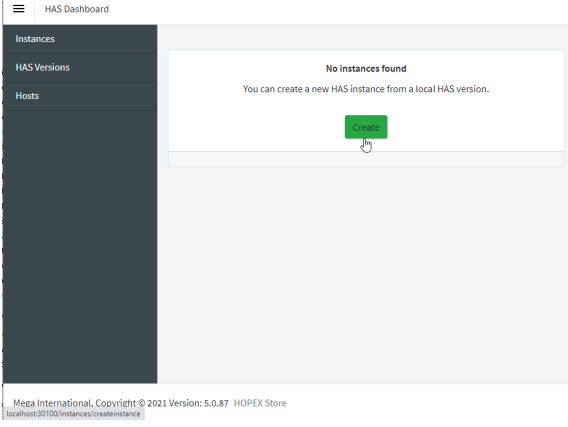
If you forgot to open the HAS Instance Manager console you can access it on: <http://localhost:30100/> (adjust port number if you have changed the default value)

Continue, to next step, to create the HAS Instance.

3.6. Creating HAS Instance

The HAS Instance Manager is now running. No HAS Server instance has been created by the setup.

- A minimum of one HAS Instance is required. Start from **Step 20**
- For cluster: see appropriate section.

Step 20	Step 21
<ul style="list-style-type: none"> • In the login page of the Instance Manager console enter the API Key created at installation. 	<ul style="list-style-type: none"> • Click New instance to create an instance
	

Step 22
<ul style="list-style-type: none"> • Give a name to the cluster. For instance, "HAS_PRODUCTION" <p>Caution: If you use default value ensure there is no existing cluster name with same name.</p> <ul style="list-style-type: none"> • Set the public URL. (Enter HTTP or HTTPS according to your case) Example: https://vp-iis1-v5.fr.mega.com • Keep Enable https selected. <p>CAUTION: Do not leave the default value with the server name if you are not installing a standalone laptop.</p>

Cluster name *
Public address (1)*

5000
https://W-HGR:5000

Used for cluster database naming
Public cluster entry point (Default is machine name with port)

Instance
Settings
Modules

Server name
Port (2)*
Mode *

W-HGR
5000
Production

HAS Version for node W-HGR

HOPEX
5.0.1+376 (HOPEX V5.0 CP1 - 64 bits [15.1.0+6025

Database connection *

server name
user name
.....
optional paramet

Cluster node communication

☒ Enable https (3)

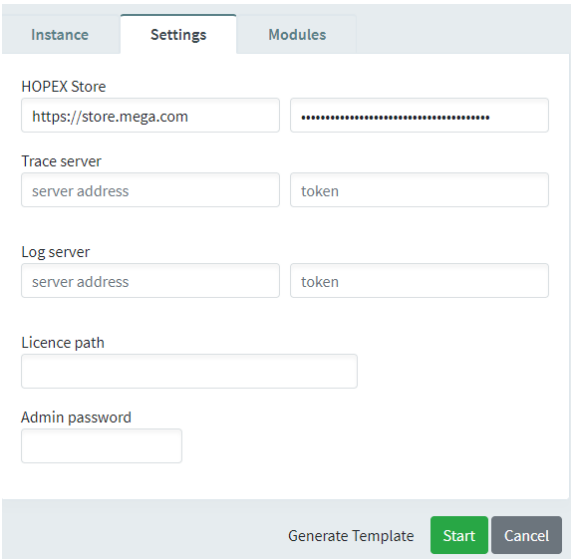
You can specify a certificate thumbprint (certificate must include the private key). If none is specified an auto-signed certificate will be created.

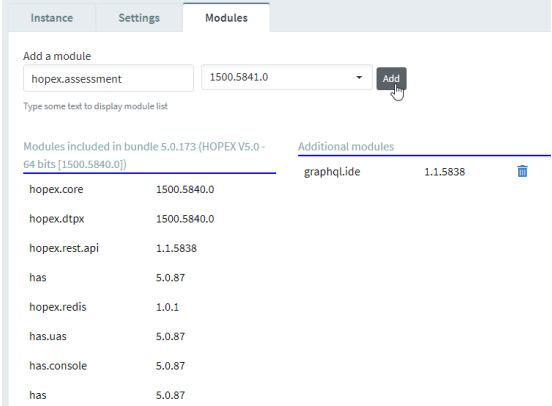
Certificate thumbprint
☐ Is Certificate Authority

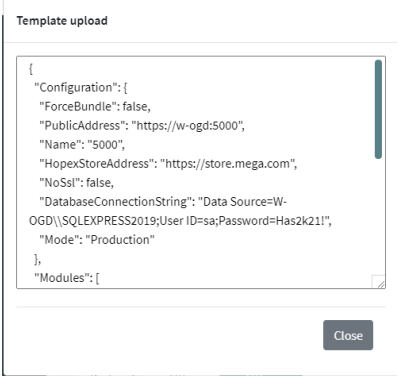
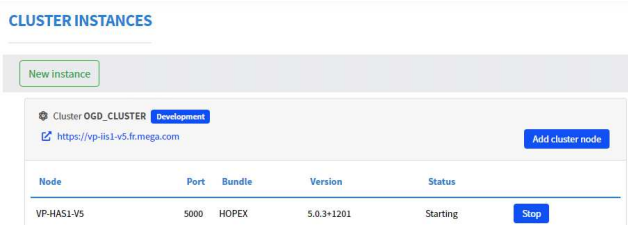
The name given to the instance will be the name of the database for HAS.

	Step 23
<div> <div> Instance Settings Modules </div> <div> <div> Server name Port (2)* Mode * </div> <div> W-HGR 5000 Production </div> </div> <div> HAS Version for node W-HGR </div> <div> HOPEX 5.0.1+376 (HOPEX V5.0 CP1 - 64 bits [15.1.0+6025 </div> </div>	<p>In the tab Instance fill in the following information:</p> <ul style="list-style-type: none"> • Select Server Name. Default: it is the server you are doing the installation on. • Set HAS Instance port. <u>Default</u> 5000 • Select an HAS Bundle. <u>Default</u> HOPEX • Select an HAS Instance version. <u>Default</u> is the one selected at setup

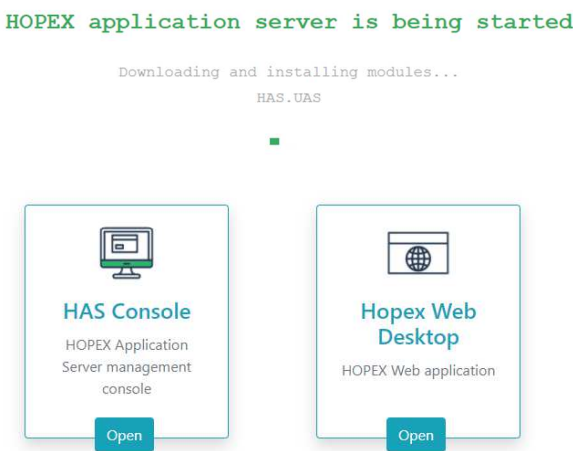
	Step 24
<div data-bbox="159 235 861 324"> <p>Database connection *</p> <div> <input type="text" value="W-HGR"/> <input type="text" value="sa"/> <input type="password" value="*****"/> <input type="button" value="optional parameters"/> </div> </div> <p>In case of Database connection error:</p> <div data-bbox="159 436 861 560"> <p>Database connection *</p> <div> <input type="text" value="W-HGR"/> <input type="text" value="sa"/> <input type="password" value="*****"/> <input type="button" value="optional parameters"/> </div> <p>Invalid database connection settings sql error code : 18456</p> </div>	<ul style="list-style-type: none"> Define the Database connection. Should you make an error in database connection an error message appears. SQL Server instance <<machine network name>>\<<SQL instance name>> SQL Server User Account User enabled to access/update SQL Server SQL Server User Password Password of the SQL server user Optional parameter <p>If You want to use the trusted connection mode put: Trusted_Connection=True</p> <p>In that case login and password should be empty.</p> <p>Please make sure you have set the user service for HAS Instance Manager see below 3.12 Windows User and access rights</p>

	Step 25
	<p>In the tab Settings fill in the following information:</p> <ul style="list-style-type: none"> The HOPEX Store installation Key. Default: it is prefilled with the information given at setup. Except if you went offline. <p><u>Optional actions</u> (that you can perform later if needed):</p> <ul style="list-style-type: none"> Log server: If you want to use SEQ add the URL and token to connect to the log server. Tracer server: If you want to use Zipkin add the URL and token to connect to the log server. License path: put here the path of the UNC for the Must license <u>Example:</u> \\W-OGD\Must Admin password: change the default password for admin user on the console. <u>Example:</u> Has2k21! <p>Please note that password must comply with complexity rules.</p>

	Step 26 (optional)
	<p>In the tab Modules you see the default module available in the bundle.</p> <p>If your server has internet access to the https://store.mega.com you can add complementary module at this step.</p> <p>Otherwise skip this step.</p> <ul style="list-style-type: none"> Select the module to add. The selection is done by the module ID Select the required version. Click Add.

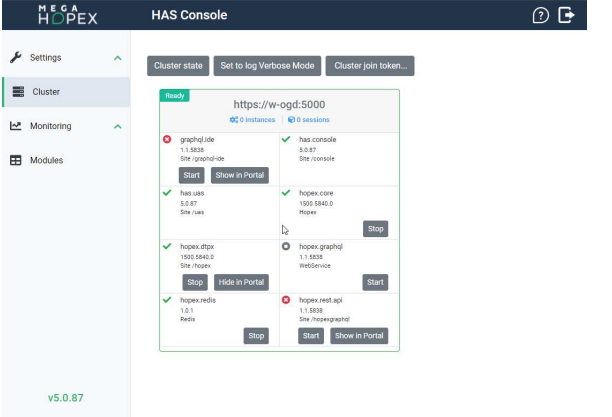
Step 27 (optional)	Step 28
<p>When your settings are correct you can save same as a template for scripting installation purposes.</p> <ul style="list-style-type: none"> click Generate template. Copy and save the generate JSON in a text file 	<ul style="list-style-type: none"> Click the Start When ready the status become "Running" Click the URL Public address to access the HAS Instance created
	

The URL visible at that stage should be the public URL. Should you see an URL such as <https://localhost:5000> or <https://servername:5000> your installation is not correct

	Step 29
	<ul style="list-style-type: none"> While loading you will see a message HAS is starting with the list of modules being deployed When ready you get redirected to the HAS portal Click the HAS console tile to enter the console.

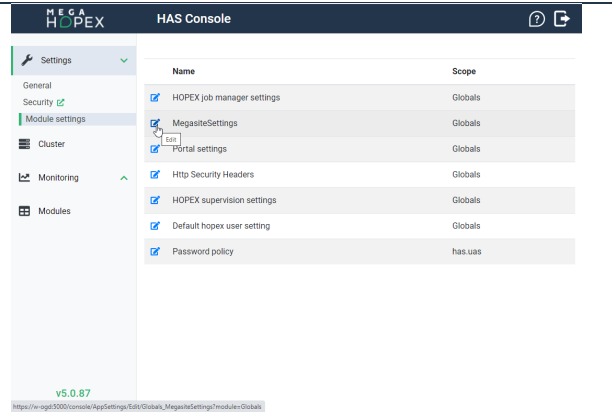
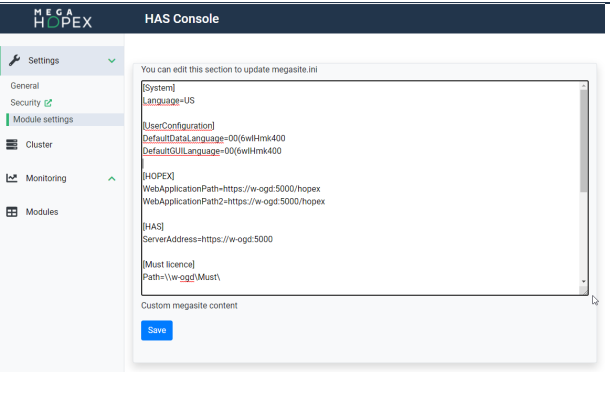
3.7. First connection to HAS Console

<p>Step 30</p> <ul style="list-style-type: none"> At first login (creation of the database HAS) on the HAS Console the default login and password are: <ul style="list-style-type: none"> Login: admin Password: Hopex (except if you did set it up on step 25) Enter the values in the fields Click Sign in. 	<p>Step 31 (optional)</p> <ul style="list-style-type: none"> Change the password as requested. Click Change password <p>The password must:</p> <ul style="list-style-type: none"> include at least 8 characters, one uppercase, one lowercase, one digit, and one special character not use any sequence of characters (e.g.: 12345, qwert) nor contextual words (e.g.: hopex, mega) be complex enough to meet your enterprise security requirements
	
<p>Step 32 (optional)</p> <ul style="list-style-type: none"> When successful a message informs you that: "Password has been changed successfully". Click Sign in with new password. 	<p>Step 33 (optional)</p> <ul style="list-style-type: none"> Login with the new password with user "Admin".
	

	Step 34
	<p>In the Console you view the modules that are installed and running</p> <p>HOPEX Core is not running because it needs:</p> <ul style="list-style-type: none"> - the Must license - One environment (SystemDB)

3.8. Adding Must license to MegaSite.ini setting

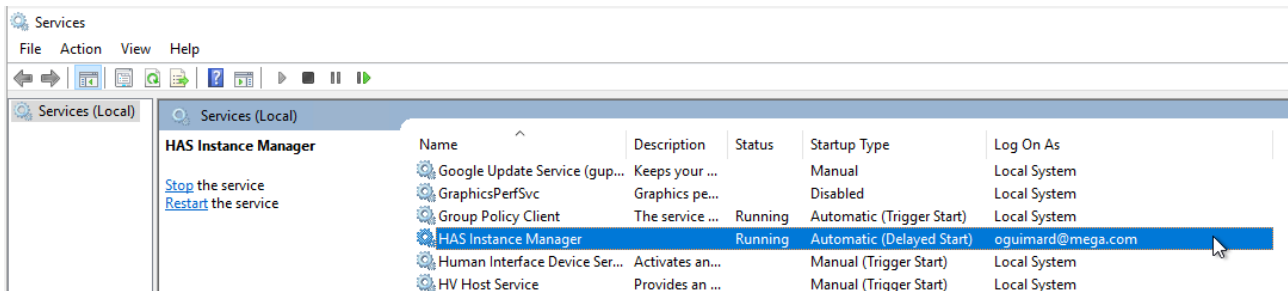
If you have set the Must license path with the Instance Manager on **Step 25** in this case you can skip and **go to step 50**.

Step 40	Step 41:
<p>Edit MegaSite.ini</p> <ul style="list-style-type: none"> Click the Module Settings menu Click the icon to edit "Megasite.ini" 	<p>Add Must settings in the text area.</p> <ul style="list-style-type: none"> Add the following section: <pre>[Must licence] Path=<<server UNC>></pre> <p>Where <<server UNC>> is the path given to sales administration when you requested your Must license file.</p> <ul style="list-style-type: none"> Click Save
	

If the license is not correct all next steps will fail. Moreover, HOPEX Core cannot start if there is no environment with a valid SystemDB.

If you did not set yet a domain user, HOPEX will not be able to access the shared drive for the license.

To verify the user used to launch HAS Instance manger go to windows services and search for HAS Instance Manager.



3.9. Creating or referencing HOPEX environment

Now you have 3 possibilities:

- **Creating** a totally new HOPEX environment: **at first installation** (new SQL Server databases)
- **Restoring** existing HOPEX environments (**recommended choice**)
 - To leverage "backup" provided in the MEGA HOPEX Store **at first installation** (restore)
 - To leverage existing databases (migration)
- **Referencing:** To leverage existing environment when you migrate from previous version.

For:

- Creating: start at step 50
- Restoring: start at step 60 → **recommended choice**
- Referencing start at step 70

3.9.1. Creating a New "HOPEX environment"

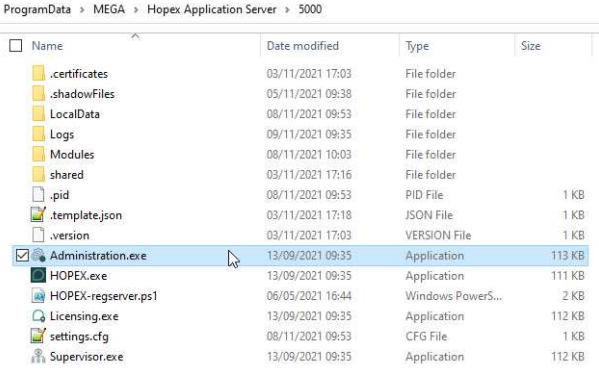
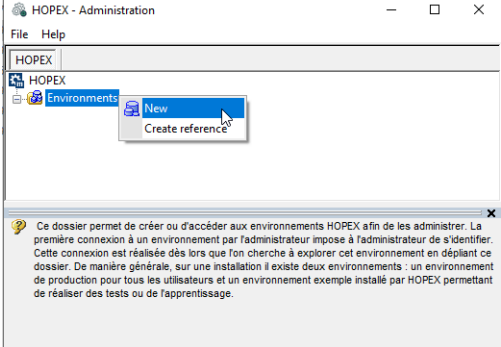
This solution may take a while as it creates all the database structure and technical content. The system will:

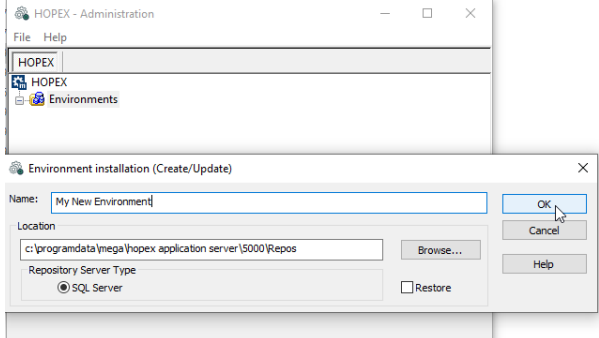
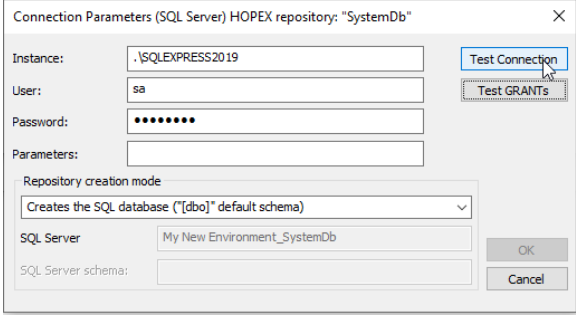
- create a SystemDB (~2h)
- create a repository (~10min)

For a faster approach go to the recommended choice.

First you must download the HOPEX Environment Installation Package V5.0 from the store and import it in HAS Console module

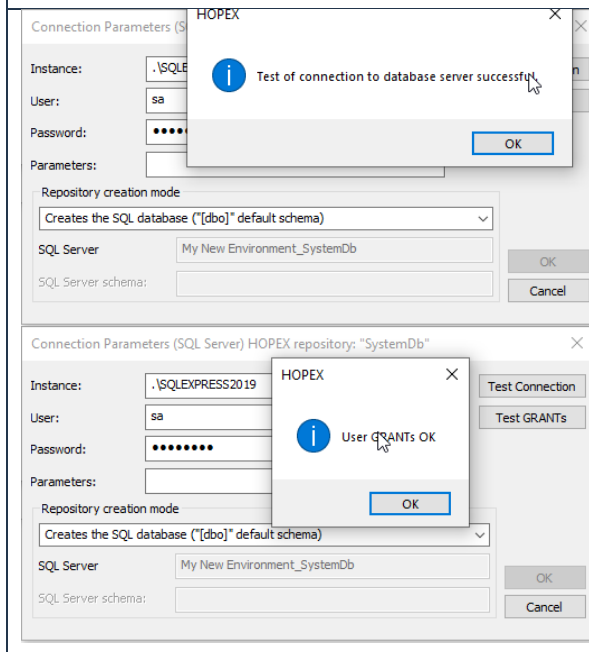
<https://store.mega.com/modules/details/hopex.core.install>

Step 50	Step 51
<ul style="list-style-type: none"> Go to HOPEX installation folder <p>Default: C:\ProgramData\MEGA\Hopex Application Server\5000</p> <ul style="list-style-type: none"> Launch Administration.exe <p>If it doesn't launch, you have:</p> <ul style="list-style-type: none"> A license issues, A HAS web access issue. 	<ul style="list-style-type: none"> Right-click "Environments" Click "New"
	

Step 52	Step 53
<ul style="list-style-type: none"> Give a name to your environment. It will create a database with the name <p><<Name>>_SystemDb</p> <ul style="list-style-type: none"> Adjust location of the folder. A set of files will be created. In case of Cluster/Farms deployment the Location should be a shared folder <p>Example: \\Environments\SharedEnvFolder</p> <ul style="list-style-type: none"> Click "OK" 	<ul style="list-style-type: none"> Enter SQL instance parameter Set the SQL user password Set the password for the SQL password Set the parameter Encrypt=no; or "yes" if you use SSL communication <p>For other SQL instance connection string please read the appropriate database setting documentation. Used Trusted Connection if you rely on domain user to authenticate to SQL Server. Leave login/password blank in that case.</p>
	

CAUTION: for ODBC Driver 18 ensure to put *Encrypt=no;* in parameter if you do not leverage SSL communication with SQL Server

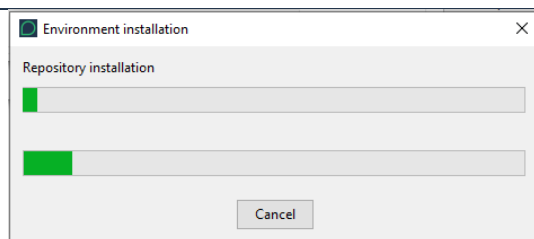
Step 54



- Click "Test Connection"
- Ensure the message says "Successful" else adjust the configuration in previous step
- Click "Test GRANTS"
- Ensure the message says "User GRANTS OK" else adjust the configuration in previous step

Step 55

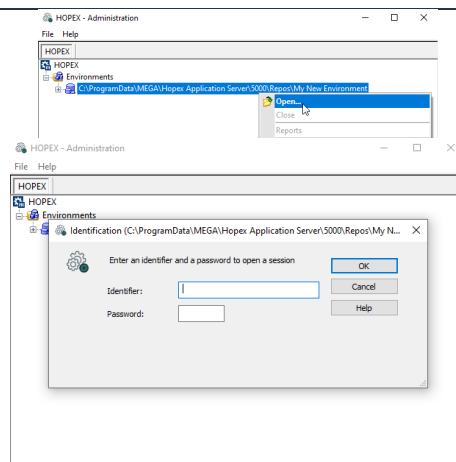
- The process is in progress. It may take a while (From 2 to 6 hours)



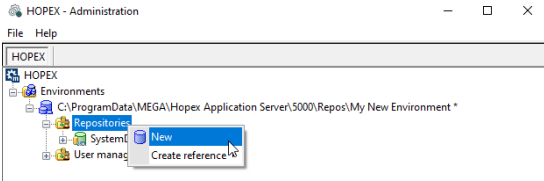
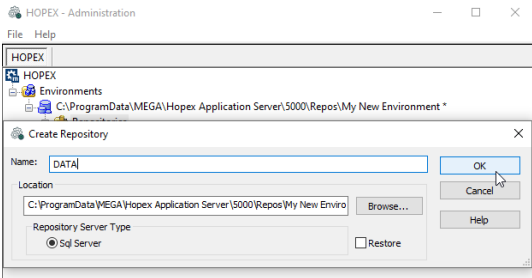
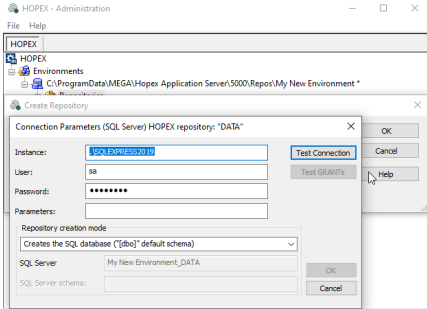
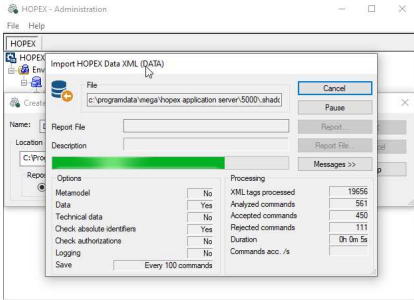
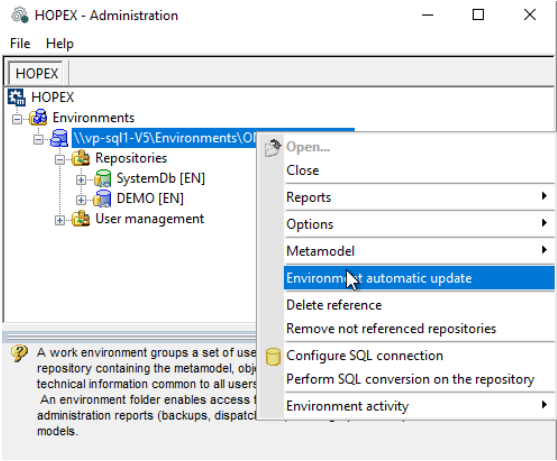
Step 56

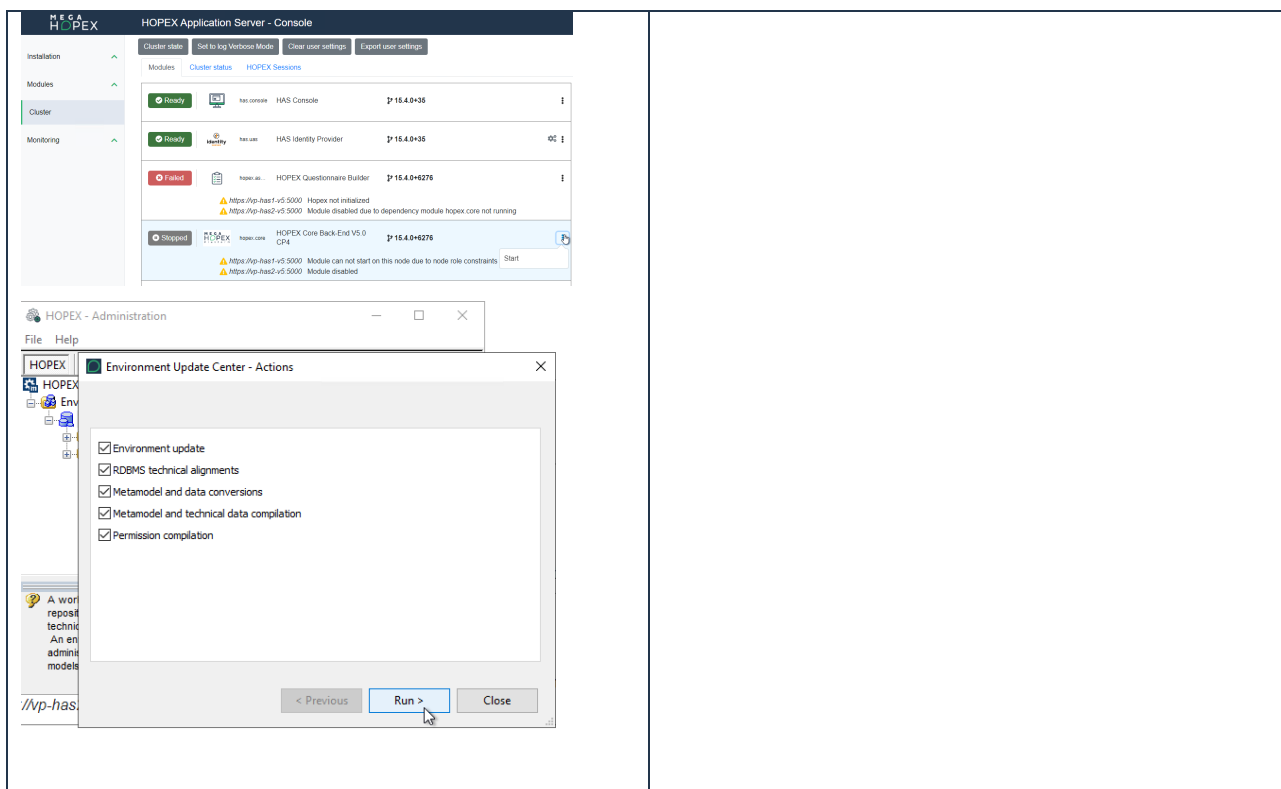
Once the environment is created:

- Right-click the environment and select **Open**
- Default Identifier: "System" with Hopex as password (or empty for previous version)
- Click **OK**



This documentation is done for an English Environment and Repositories. If you want a repository in French/Spanish/German/Italian...Ensure to compile the Metamodel in the appropriate language before creating the repository.

<p>Step 57</p> <ul style="list-style-type: none"> Expand the environment Right-click Repositories and select New Give a name to the repository "DATA" Click OK  	<p>Step 58</p> <ul style="list-style-type: none"> If prompted Test Connection and Test Grants The creation is in progress. some file will be imported automatically. <p>CAUTION: do not click Cancel or Pause</p> <p>For information: the repository language at creation is the same as the SystemDB one.</p>  
	<p>Step 59</p> <p>Once the repository is created:</p> <ul style="list-style-type: none"> Right-click the environment and select Environment automatic update <p>You may need to stop the module HOPEX Core Back-End from HAS Console and restart Administration.exe</p> <ul style="list-style-type: none"> Follow the step of the wizard by clicking Next up to Run. <p>For PRODUCTION environment:</p> <ul style="list-style-type: none"> Check "Permission compilation"



3.9.2. Restoring an existing database

Restore an existing database if you did not just create a totally new environment in previous chapter.

Two scenarios:

- You are a totally new customer:

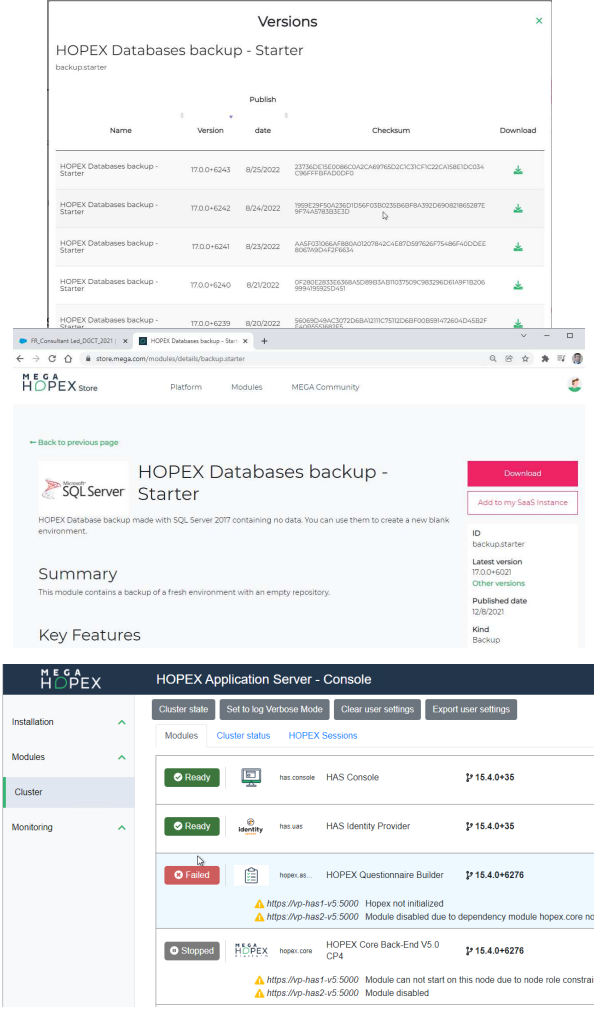
You can leverage “backup” provided by MEGA HOPEX Store

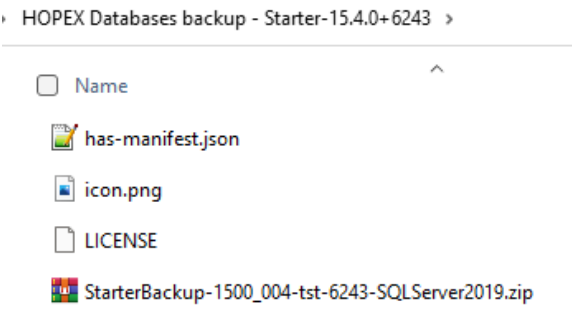
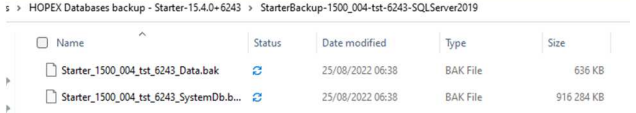
- You are an existing customer:

You have existing database (SystemDb and repositories) that you want to add to this new installation. This is common in case of migration to a newer version.

3.9.2.1. Get MEGA HOPEX Store backup

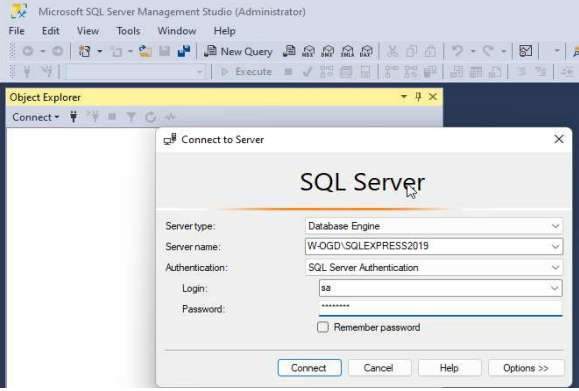
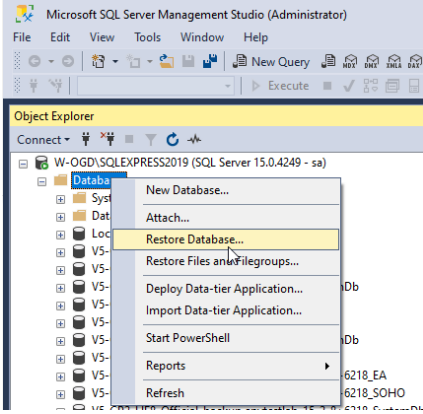
You may skip this part if you already have backup.

	Step 60																																													
 <p>HOPEX Databases backup - Starter</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Version</th> <th>date</th> <th>Checksum</th> <th>Download</th> </tr> </thead> <tbody> <tr> <td>HOPEX Databases backup - Starter</td> <td>17.0.0+6243</td> <td>8/25/2022</td> <td>23736D5E5E0086C0AC46F76502C3C3FC12C2CA58E1DC33A CWF7F8FA00D0F0</td> <td></td> </tr> <tr> <td>HOPEX Databases backup - Starter</td> <td>17.0.0+6242</td> <td>8/24/2022</td> <td>599728F0A12627C0D96F03B03205068F8A792D0K908265307E 9F7402785323C3D</td> <td></td> </tr> <tr> <td>HOPEX Databases backup - Starter</td> <td>17.0.0+6241</td> <td>8/23/2022</td> <td>A5EF03D066AF880402078A43C4E8FD597626F75486F45C0EE B030804F3F663A</td> <td></td> </tr> <tr> <td>HOPEX Databases backup - Starter</td> <td>17.0.0+6240</td> <td>8/21/2022</td> <td>0F78C1E3E203088A0C8883A8F0370C9C36329C48A9F18206 9994939323D43D</td> <td></td> </tr> <tr> <td>HOPEX Databases backup - Starter</td> <td>17.0.0+6239</td> <td>8/20/2022</td> <td>600804BAC7072D68A0217C7571D06BF00B99472604D4582F 6A03030303C3D</td> <td></td> </tr> </tbody> </table> <p>HOPEX Application Server - Console</p> <p>Cluster state: Ready Set to log Verbose Mode Clear user settings Export user settings</p> <p>Modules: Cluster status HOPEX Sessions</p> <table border="1"> <thead> <tr> <th>Module</th> <th>Status</th> <th>Version</th> </tr> </thead> <tbody> <tr> <td>has console</td> <td>Ready</td> <td>15.4.0+35</td> </tr> <tr> <td>has ihs</td> <td>Ready</td> <td>15.4.0+35</td> </tr> <tr> <td>HOPEX Questionnaire Builder</td> <td>Failed</td> <td>15.4.0+6276</td> </tr> <tr> <td>HOPEX Core Back-End V5.0 CP4</td> <td>Stopped</td> <td>15.4.0+6276</td> </tr> </tbody> </table>	Name	Version	date	Checksum	Download	HOPEX Databases backup - Starter	17.0.0+6243	8/25/2022	23736D5E5E0086C0AC46F76502C3C3FC12C2CA58E1DC33A CWF7F8FA00D0F0		HOPEX Databases backup - Starter	17.0.0+6242	8/24/2022	599728F0A12627C0D96F03B03205068F8A792D0K908265307E 9F7402785323C3D		HOPEX Databases backup - Starter	17.0.0+6241	8/23/2022	A5EF03D066AF880402078A43C4E8FD597626F75486F45C0EE B030804F3F663A		HOPEX Databases backup - Starter	17.0.0+6240	8/21/2022	0F78C1E3E203088A0C8883A8F0370C9C36329C48A9F18206 9994939323D43D		HOPEX Databases backup - Starter	17.0.0+6239	8/20/2022	600804BAC7072D68A0217C7571D06BF00B99472604D4582F 6A03030303C3D		Module	Status	Version	has console	Ready	15.4.0+35	has ihs	Ready	15.4.0+35	HOPEX Questionnaire Builder	Failed	15.4.0+6276	HOPEX Core Back-End V5.0 CP4	Stopped	15.4.0+6276	<ul style="list-style-type: none"> Go on MEGA HOPEX Store to get the HOPEX Database backup -Starter <p>https://store.mega.com/modules/details/backup.starter</p> <ul style="list-style-type: none"> Download the backup related to you version. Click "Other version" to access all versions. <p>To know you version.</p> <ul style="list-style-type: none"> Go in HAS Console Go in Cluster View Check version number for HOPEX Core Back-end module Take the same version and build 15.x.x+xxxx
Name	Version	date	Checksum	Download																																										
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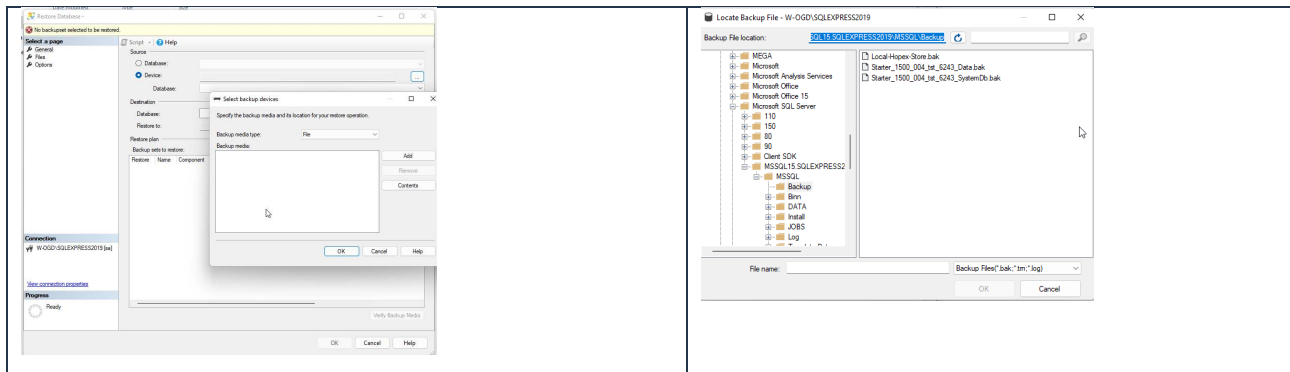
Step 61	Step 62
<ul style="list-style-type: none"> Rename extension haspk to zip or open directly with you preferred tool to extract. Unzip the downloaded file Unzip the zipped contained inside 	<ul style="list-style-type: none"> You should have 2 files with the extension ".bak" named: "Starter..._Data.bak" "Starer..._SystemDb.bak"
	

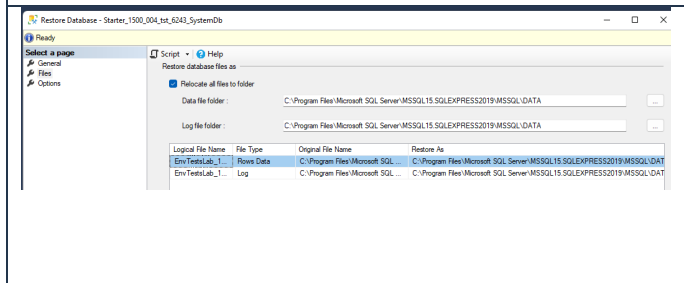
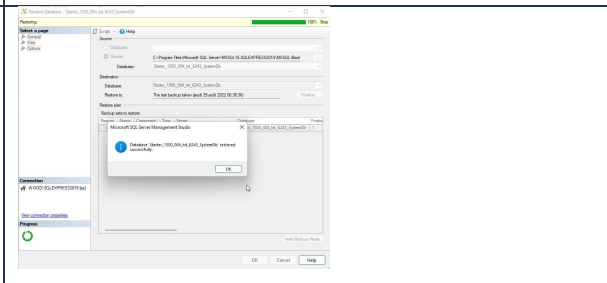
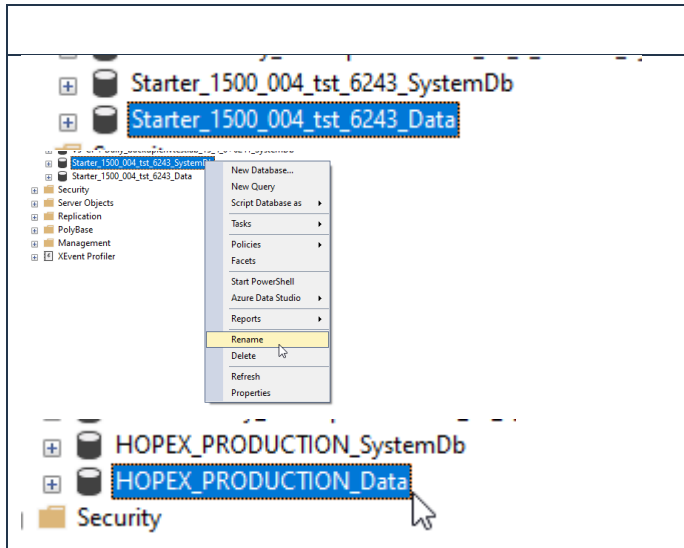
You now need to import those bak in SQL Server. Many options are possible and many tools exist to perform this action. **Use your preferred tool.**

The following step use **SQL Management Studio** as a example. You can download it here: <https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-ver16>

Step 63	Step 64
<ul style="list-style-type: none"> Launch SQL Management Studio and connect to your SQL Server Use the user account that have enough privilege. In that example "sa" 	<ul style="list-style-type: none"> Right-click Databases and select Restore Database
	

Step 65	Step 66
<ul style="list-style-type: none"> Select device Click Add 	<ul style="list-style-type: none"> Browser for the backup you want to restore



Step 67 (optional)	Step 68
<ul style="list-style-type: none"> Click Files Click Relocate all files to folder Adjust file location and name Click OK 	<ul style="list-style-type: none"> The import is in progress. Click OK when done Repeat step 64 to 68.
	
	<p>Step 69</p> <p>You should now find 2 databases</p> <ul style="list-style-type: none"> Rename to your need while keeping naming convention <p>For instance, replace "Start****" by "HOPEX_PRODUCTION"</p> <p>_SystemDB cannot be changed.</p> <p>_Data can be changed by "_****" where *** is your new name</p>

Go to 3.9.3 Referencing existing environment section.

3.9.2.1. Use Customer backup

First you must download the HOPEX Environment Migration Package V5.0 from the store and import it in HAS Console module

<https://store.mega.com/modules/details/hopex.core.migrate>

Perform the same steps with your backup as described in Get MEGA HOPEX Store backup above.

Go to 3.9.3 Referencing existing environment section.

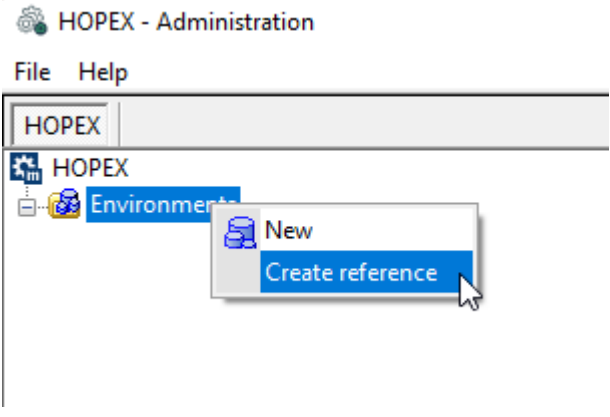
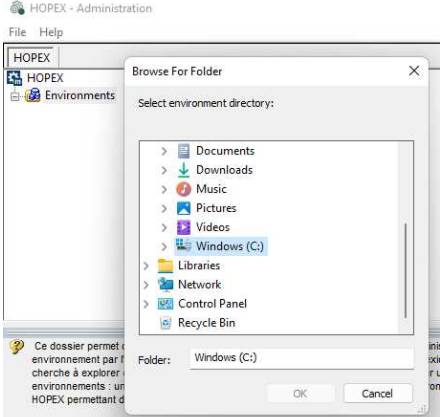
3.9.3. Referencing existing environment

	Step 70																																																																																
<div><div>ProgramData > MEGA > Hopex Application Server > 5000</div><table><thead><tr><th><input type="checkbox"/></th><th>Name</th><th>Date modified</th><th>Type</th><th>Size</th></tr></thead><tbody><tr><td></td><td>.certificates</td><td>03/11/2021 17:03</td><td>File folder</td><td></td></tr><tr><td></td><td>.shadowFiles</td><td>05/11/2021 09:38</td><td>File folder</td><td></td></tr><tr><td></td><td>LocalData</td><td>08/11/2021 09:53</td><td>File folder</td><td></td></tr><tr><td></td><td>Logs</td><td>09/11/2021 09:35</td><td>File folder</td><td></td></tr><tr><td></td><td>Modules</td><td>08/11/2021 10:03</td><td>File folder</td><td></td></tr><tr><td></td><td>shared</td><td>03/11/2021 17:16</td><td>File folder</td><td></td></tr><tr><td></td><td>.pid</td><td>08/11/2021 09:53</td><td>PID File</td><td>1 KB</td></tr><tr><td></td><td>.template.json</td><td>03/11/2021 17:18</td><td>JSON File</td><td>1 KB</td></tr><tr><td></td><td>.version</td><td>03/11/2021 17:03</td><td>VERSION File</td><td>1 KB</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Administration.exe</td><td>13/09/2021 09:35</td><td>Application</td><td>113 KB</td></tr><tr><td></td><td>HOPEX.exe</td><td>13/09/2021 09:35</td><td>Application</td><td>111 KB</td></tr><tr><td></td><td>HOPEX-regserver.ps1</td><td>06/05/2021 16:44</td><td>Windows PowerS...</td><td>2 KB</td></tr><tr><td></td><td>Licensing.exe</td><td>13/09/2021 09:35</td><td>Application</td><td>112 KB</td></tr><tr><td></td><td>settings.cfg</td><td>08/11/2021 09:53</td><td>CFG File</td><td>1 KB</td></tr><tr><td></td><td>Supervisor.exe</td><td>13/09/2021 09:35</td><td>Application</td><td>112 KB</td></tr></tbody></table></div>	<input type="checkbox"/>	Name	Date modified	Type	Size		.certificates	03/11/2021 17:03	File folder			.shadowFiles	05/11/2021 09:38	File folder			LocalData	08/11/2021 09:53	File folder			Logs	09/11/2021 09:35	File folder			Modules	08/11/2021 10:03	File folder			shared	03/11/2021 17:16	File folder			.pid	08/11/2021 09:53	PID File	1 KB		.template.json	03/11/2021 17:18	JSON File	1 KB		.version	03/11/2021 17:03	VERSION File	1 KB	<input checked="" type="checkbox"/>	Administration.exe	13/09/2021 09:35	Application	113 KB		HOPEX.exe	13/09/2021 09:35	Application	111 KB		HOPEX-regserver.ps1	06/05/2021 16:44	Windows PowerS...	2 KB		Licensing.exe	13/09/2021 09:35	Application	112 KB		settings.cfg	08/11/2021 09:53	CFG File	1 KB		Supervisor.exe	13/09/2021 09:35	Application	112 KB	<ul style="list-style-type: none">Go to HOPEX installation folder <p><u>Default:</u> C:\ProgramData\MEGA\Hopex Application Server\5000</p> <ul style="list-style-type: none">Launch Administration.exe <p>If it doesn't launch, you have:</p> <ul style="list-style-type: none">A license issues,A HAS web access issue.
<input type="checkbox"/>	Name	Date modified	Type	Size																																																																													
	.certificates	03/11/2021 17:03	File folder																																																																														
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If you are coming from 3.9.2 Restoring an existing database you most likely need to go to Step 73 in chapter "3.9.3.2 From restore step"

3.9.3.1. From existing folder

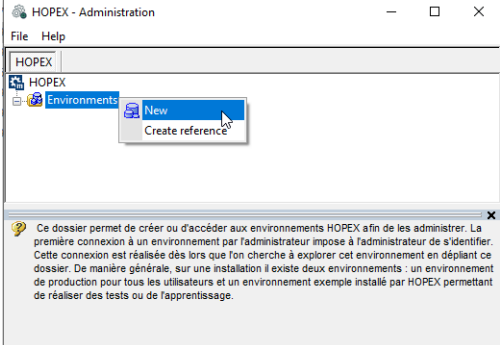
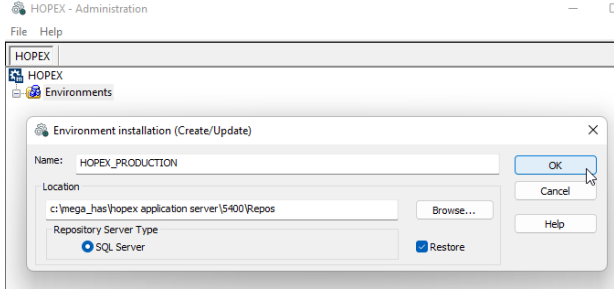
Follow this step if you have already a folder of environment and a database in SQL. You are in this situation if you are **migrating from previous version**. Otherwise go to the next chapter 3.9.3.2 From restore step

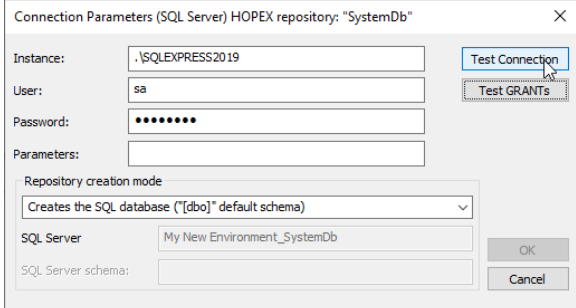
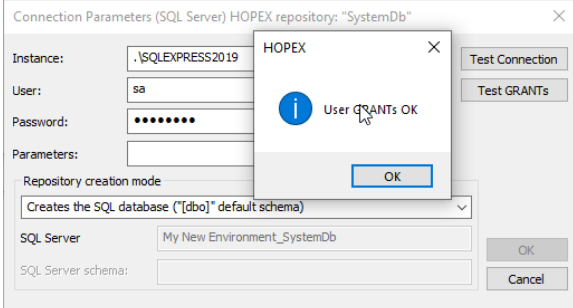
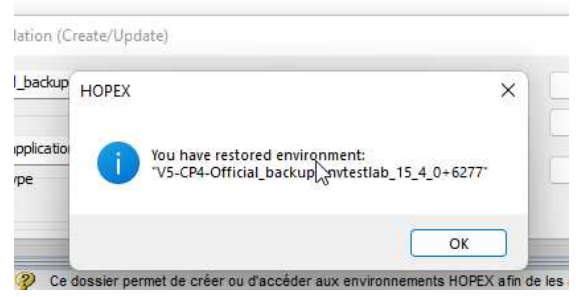
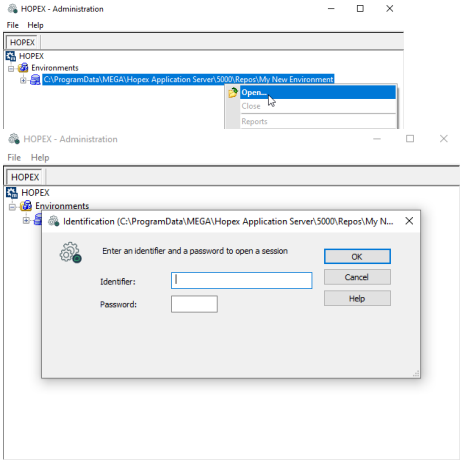
Step 71	Step 72
<ul style="list-style-type: none"> Right-click Environments and select Create Reference 	<ul style="list-style-type: none"> Select the folder that contains your environment. <p>Once you have selected a valid folder, the OK button is enabled</p>
	

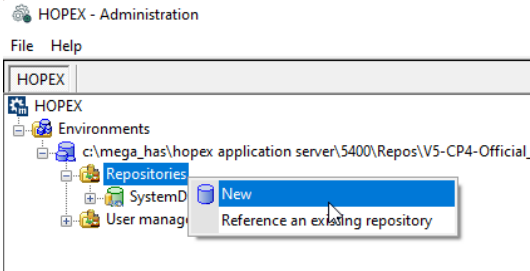
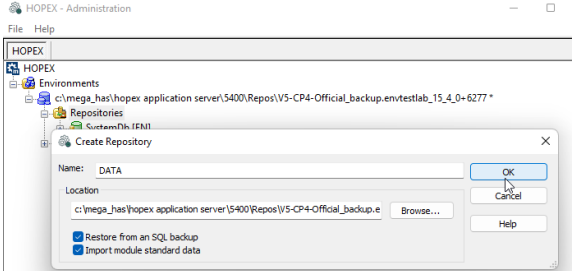
If you succeeded this step, you can now continue to 3.10 Configuring the non-interactive desktop heap

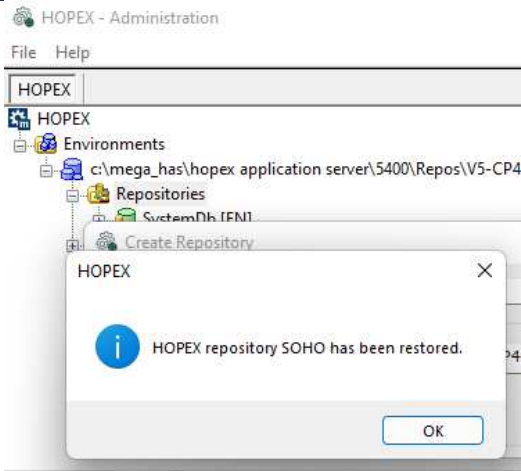
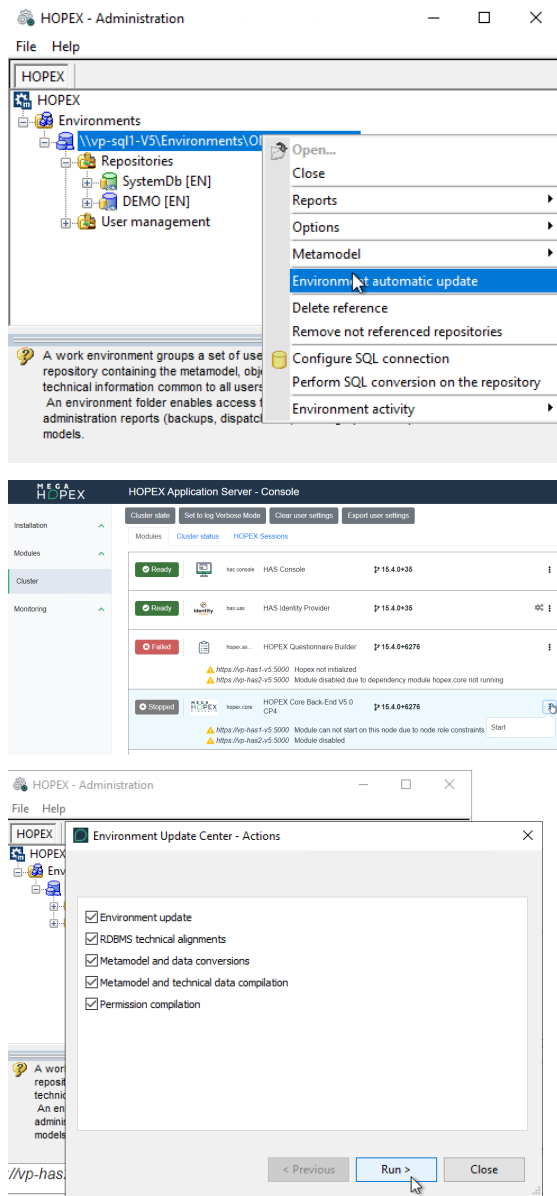
3.9.3.2. From restore step

Perform Step 70 then continue to Step 73

Step 73	Step 74
<ul style="list-style-type: none"> Right-click Environments and select New 	<ul style="list-style-type: none"> Enter the name of your environment, the one you chose on "Step 69". <p>For Example, "HOPEX_PRODUCTION"</p> <ul style="list-style-type: none"> Adjust location of the folder. A set of files will be created. In case of Cluster/Farms deployment the Location should be a shared folder <p>Example: <u>\\Environments\SharedEnvFolder</u></p> <ul style="list-style-type: none"> Check Restore Click OK
	

<p>Step 75</p> <ul style="list-style-type: none"> • Enter SQL instance parameter • Set the SQL user password • Set the password for the SQL password • Set the parameter Encrypt=no; or "yes" if you use SSL communication. <p>For other SQL instance connection string please read the appropriate database setting documentation.</p> <p>Use Trusted Connection if you rely on domain user to authenticate to SQL Server.</p>	<p>Step 76</p> <ul style="list-style-type: none"> • Click Test Connection • Ensure the message says "Successful" else adjust the configuration in previous step • Click Test GRANTS <p>Ensure the message says "User GRANTS OK" else adjust the configuration in previous step</p> <ul style="list-style-type: none"> • Click OK
	
<p>Step 77</p> <ul style="list-style-type: none"> • When successful you get a message. • Click OK 	<p>Step 78</p> <ul style="list-style-type: none"> • Once the environment is restored, right-click the environment and select Open • Default Identifier: "System" with the appropriate password. Default is Hopex. • Click OK
	

Step 79	Step 80
<ul style="list-style-type: none"> Expand Environments Right-click Repositories, and select New 	<ul style="list-style-type: none"> Select Restore from an SQL Setup Enter a Name for the repository
 <p>The screenshot shows the HOPEX - Administration window. The left sidebar has a tree view with 'Environments' expanded. Under 'Environments', there is a folder 'c:\mega_has\hopex application server\5400\Repos\V5-CP4-Official_'. Right-clicking on 'Repositories' has opened a context menu with a 'New' button. A tooltip for the 'New' button says 'Reference an existing repository'.</p>	 <p>The screenshot shows the 'Create Repository' dialog box. The 'Name' field contains 'DATA'. The 'Location' field contains 'c:\mega_has\hopex application server\5400\Repos\V5-CP4-Official_backup.e'. The 'Restore from an SQL backup' checkbox is checked. The 'Import module standard data' checkbox is also checked. The 'OK' button is highlighted.</p>

Step 81	Step 82
<ul style="list-style-type: none"> Repeat Step 75 and 76 Click OK when successful. 	<ul style="list-style-type: none"> Once the repository is restored, right-click the environment and select Environment automatic update <p>You may need to stop the module HOPEX Core Back-End from HAS Console and restart Administration.exe</p> <ul style="list-style-type: none"> Follow the step of the wizard by clicking Next up to Run. <p>For PRODUCTION environment:</p> <ul style="list-style-type: none"> Check "Permission compilation"
	

3.10. Configuring the non-interactive desktop heap

The Desktop Heap is an internal memory of Windows. It is used by HOPEX. It is thus mandatory to update this value.

- For more information about desktop heap, see official Microsoft documentation: <https://docs.microsoft.com/en-us/troubleshoot/windows-server/performance/desktop-heap-limitation-out-of-memory>.

A minimum value of **8192** is required for optimal usage. This modification is performed in the Windows Registry.

To configure the non-interactive desktop heap:

1. Open Windows registry: "regedit.exe".
2. Search for value name in:

HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Session Manager\SubSystems.

3. Edit the value data: there is a long string for this value that looks similar to:

%SystemRoot%\system32\csrss.exe ObjectDirectory=Windows SharedSection=1024,20480,**8192**
Windows

In the **Shared Section** part, the three values are, in order:

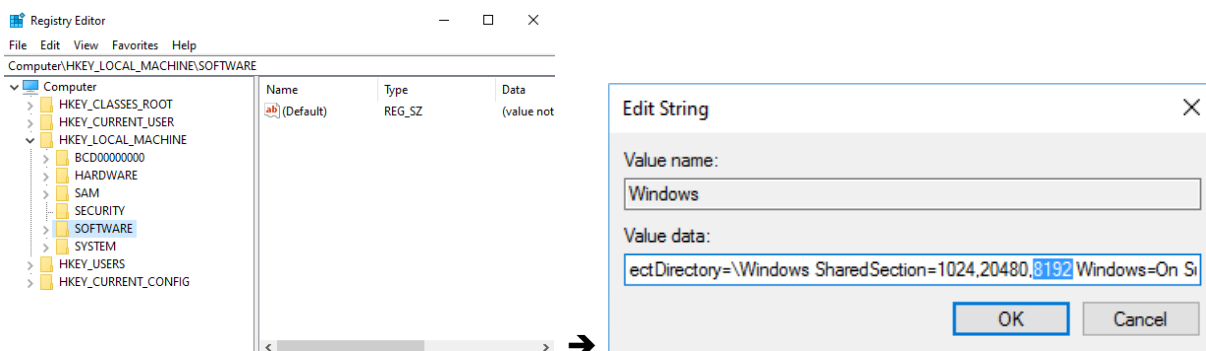
- the shared heap,
- the interactive desktop heap, and
- the non-interactive desktop heap.

They are expressed in KB. Default values vary significantly between Windows versions.

4. You might need to modify **the non-interactive desktop heap**.

Be careful of not using excessive values, as this could stop you from logging into your server.

It is therefore recommended to change this value using small increments. The recommended value is: **8192**.



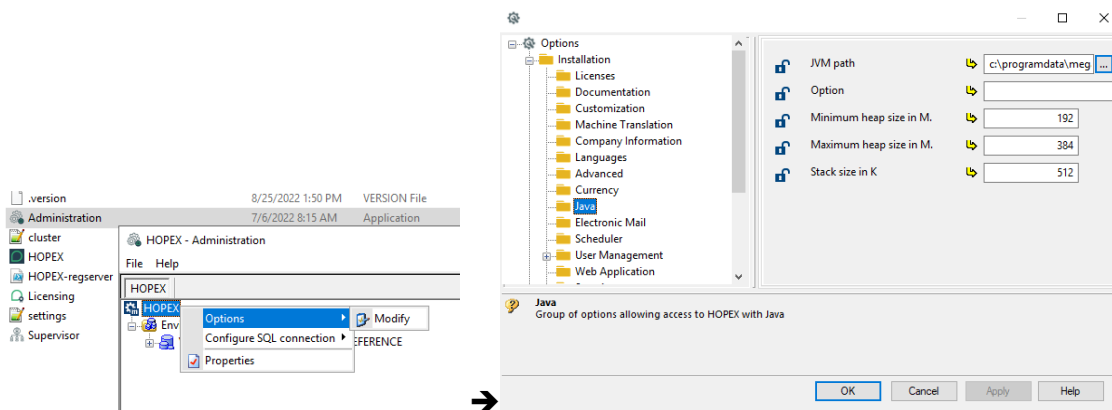
3.11. Configuring Java Heap size (optional)

HOPEX Platform embeds an internal JVM. When running HOPEX some reports might generate huge consumption of JAVA object and therefore consume a lot of memory.

Change this option only if you have hit the limit of memory consumption of JAVA.

1. Launch Administration.exe
2. At the root level, right-click **HOPEX**, and select **Options > Modify**.
3. Select **Installation > Java**.
4. Edit **Maximum heap size** or **Stack size**.

Recommendation increase by a factor 2: 192, 384, 768... or 512, 1024...



3.12. Windows User and access rights

You can skip this step if you are a developer, consultant or partner doing a standalone.

When installing MEGA HOPEX, a **domain user** is required to manage access to:

- Must license file and folder
- Shared environment UNC

It is recommended not to execute the HAS Instance manager with the default **Local System** account. You will therefore need a domain user with sufficient privilege.

Please note that a **domain user is required for cluster** deployment.

The minimum required privilege of this domain user:

- Read/Write access on the shared folder of the Must license
- Read/Write access on the shared folder of the HOPEX environment folder
- Execute/Read/Write access on all the installation folders

Additional requirement:

- This domain user can be used to access the database in case you use the connection trusted configuration for SQL Server. It should be properly configured in SQL Server.
- You should enable Read/Write in the certificate store to import HAS self-signed certificate. If you don't allow it a complementary step to import manually the **root.pfx** located in C:\...\HOPEX Application Server\...\certificates

Ideally this domain user is Administrator of the server.

3.12.1. Changing the user domain

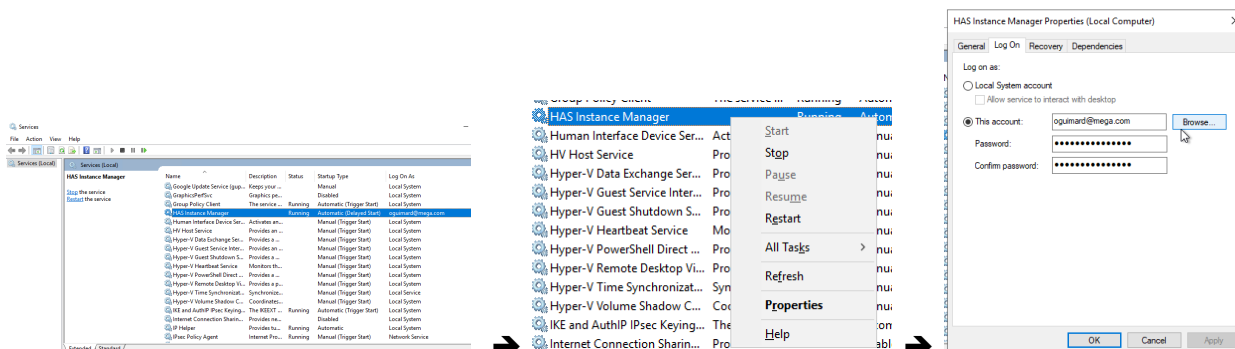
To change the user please ensure to:

- Stop running instance



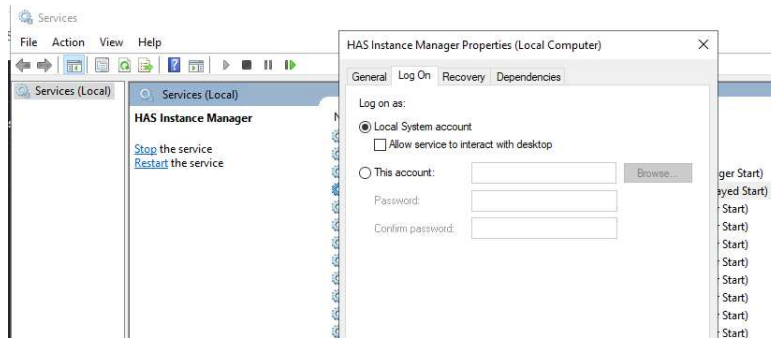
- Stop HAS Instance

1. Go to windows Services.exe
2. Right-click **HAS Instance Manager** and select **Properties**.
3. Click **Log on** tab.
4. Select **This account** and click **Browse**.
5. Enter the domain user and password.



3.12.2. Keeping Local system

What is the impact of keeping local system?



In that case:

- The Must license shared folder must be shared to “Everyone” with full control
- The environment folder should be on C:\ drive or shared with “Everyone”
- You cannot configure “Trusted Connection” with SQL server
- You cannot **run in cluster**

3.13. Installing a DEV server

When installing a server for “Development” purposes it is mandatory to:

- install .net 6 SDK
- download “**HOPEX Application Server Customization**” module and import it in HAS Instance
- install HAS nuget package on the server as explained in the module custom. Please README.MD and HOW-TO.MD file the custom module
- ensure you have the right to execute powershell script:

Set-ExecutionPolicy -ExecutionPolicy RemoteSigne

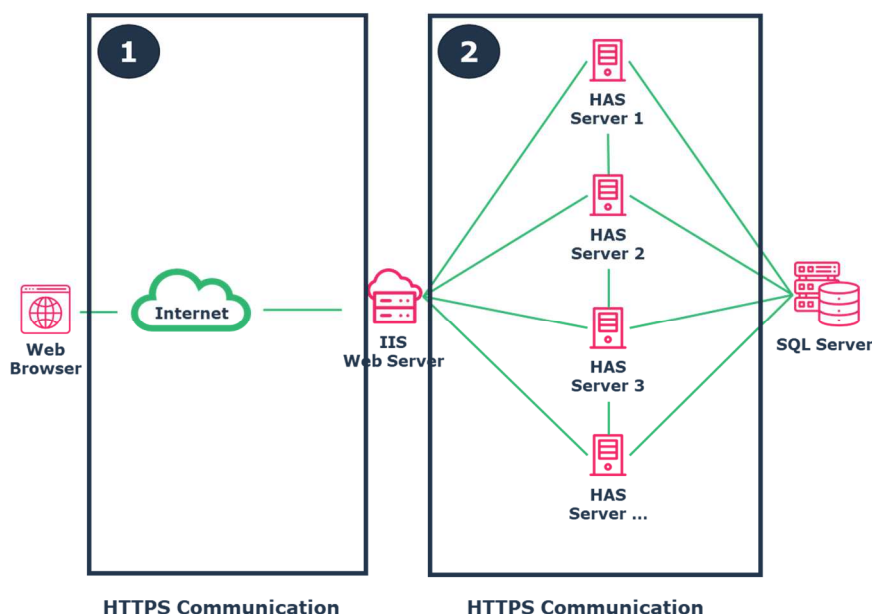
4. SSL Certificates configuration

Read carefully this chapter if:

- you have chosen a secured deployment with HTTPS protocol.
- you have more than 1 server

There are 2 layers of communication for HTTPS:

- 1: HTTPS Communication between the web browser and IIS Web Server
- 2: HTTPS Communication between the IIS web Server to HOPEX Application server and between HAS Server themselves.

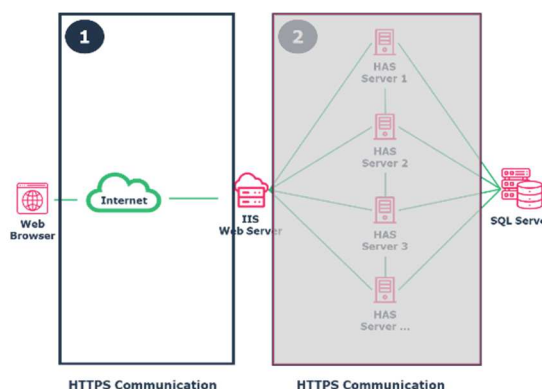


Each layer/path has its own SSL Certificate.

4.1. Configuring public SSL Certificate (1)

This certificate is **generated by the customer**. Ensure that the generated certificate has:

- a Certificate Authorities and a Certificate Chains that are valid with Trusted Authorities.
- a Certification path that corresponds to the chosen DNS
- a set of Subject Alternative Name that corresponds to the chosen DNS.



To have a valid deployment you must import this SSL Certificate in all servers (IIS+HAS).

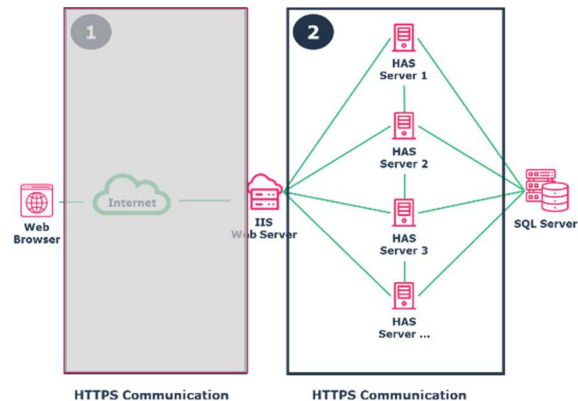
Perform the following task:

- Generate your own SSL signed certificate.
- For **each server (IIS+HAS)**, repeat the step "4.3 Adding certificate on the server" where you had this certificate.

4.2. Configuring HAS Cluster node SSL Certificate (2)

This certificate is **generated by HAS at first launch by the first server.**

- This is a self-signed certificate with a 30-year validity
- This certificate is named **root.pfx** and is available on the first HAS Server of the farm
- This root certificate is used to generate a **node.pfx** certificate for each HAS node. This node.pfx is generated automatically.



To have a valid deployment you must import this **root.pfx** SSL Certificate in all servers (IIS+HAS). This certificate has no password.

Perform the following tasks:

1. Access the first HAS server installed.
2. Go to C:\...\HOPEX Application Server\<<port>>\.certificates folder.
3. Search for **root.pfx** file.
4. Copy and keep this file.
5. For **each server (IIS+HAS)**, repeat the step "4.3 Adding certificate on the server" using the **root.pfx** certificate you copied.
6. If prompted for a password, leave it blank, as this certificate has no password.

4.3. Adding certificate on the server

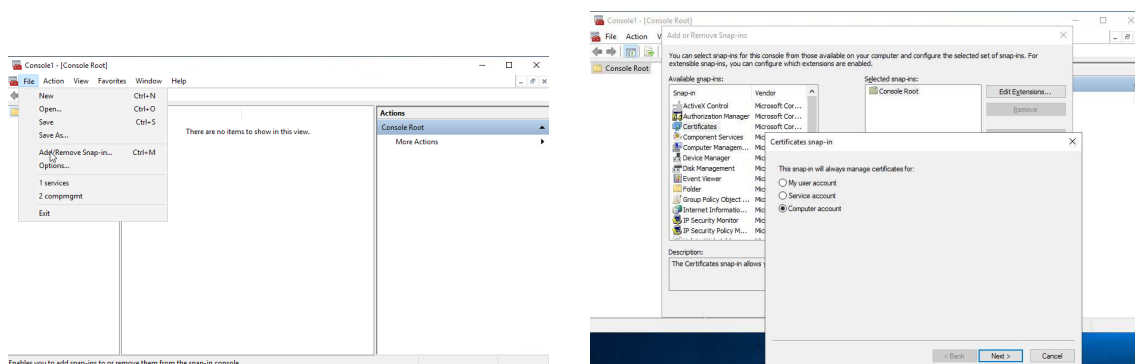
Follow the instruction provided by Microsoft to install the certificate in the local computer store:

<https://docs.microsoft.com/en-us/troubleshoot/windows-server/windows-security/install-imported-certificates>

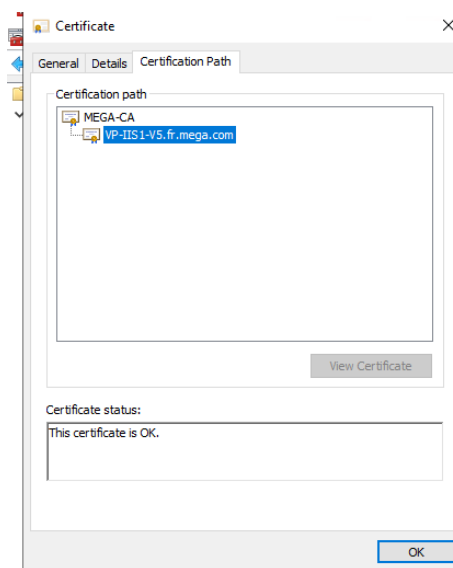
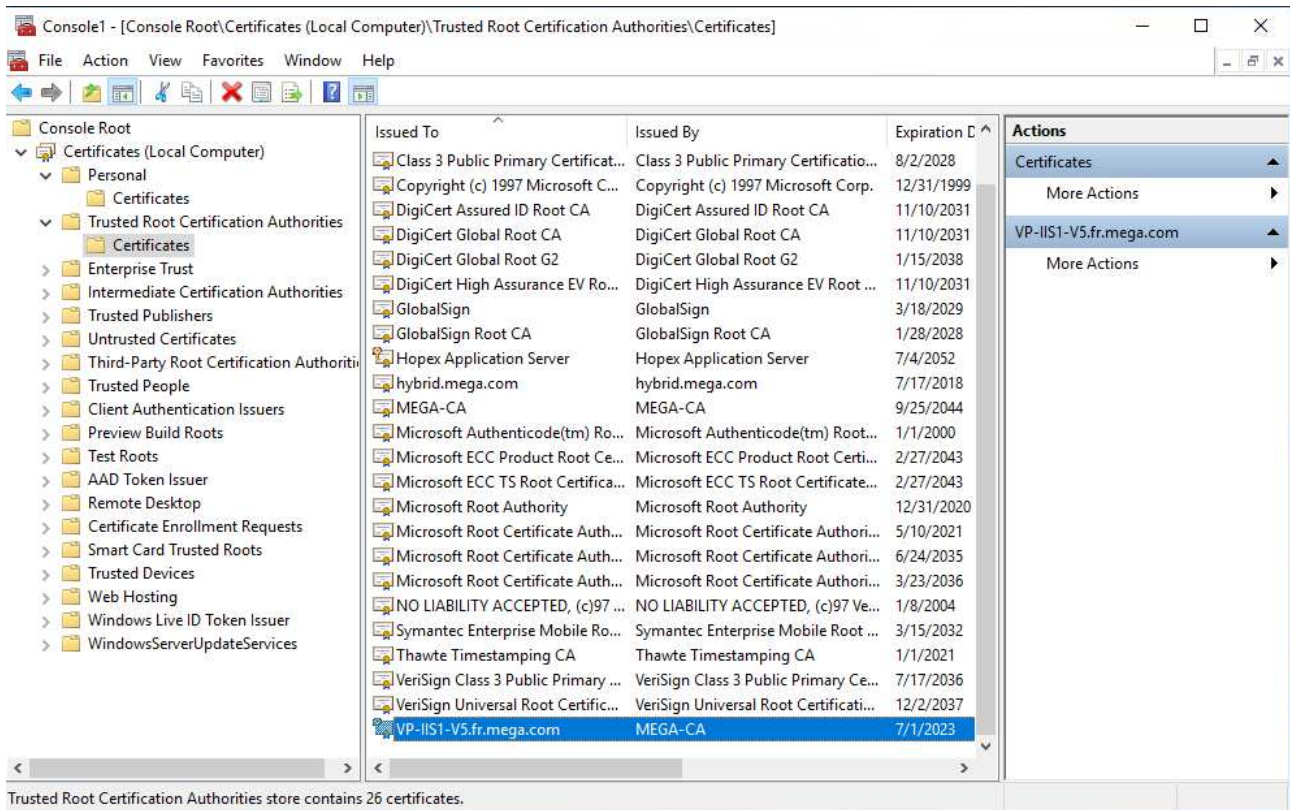
1. In the search box, type mmc, and then click **OK**.
2. On the **File** menu, select **Add/Remove snap-in**.
3. In the Add/Remove Snap-in dialog box, select **Add**.
4. In the Add Standalone Snap-in dialog box, select **Certificates**, and then select **Add**.

5. In the Certificates snap-in dialog box, select **Computer account**, and then select **Next**.
6. In the Select Computer dialog box, select **Local computer**: (the computer this console is running on), and then click **Finish**.
7. In the Add Standalone Snap-in dialog box, click **Close**.
8. In the Add/Remove Snap-in dialog box, click **OK**.
9. In the left pane of the console, double-click **Certificates** (Local Computer).
10. Right-click **Trusted Root Certification Authorities**, point to All Tasks, and then select **Import**.
11. On the Welcome to the Certificate Import Wizard page, click **Next**.
12. On the File to Import page, click **Browse**, locate your certificate file, and then click **Next**.
13. If the certificate has a password, enter the password on the Password page, and then click **Next**.
14. On the Certificate Store page, select Place all certificates in the following store, and then click **Next**.
15. Click **Finish**, and then click **OK** to confirm that the import was successful.

Some Screenshots of the process:



In this example the public certificate is named "VP-IIS1-V5.fr.mega.com".



If the certificate is not signed by a trusted authority, ensure that this certificate is present in all servers and laptops that will use the website.

Make sure that the certificate path is also present on all of the servers. Should one certificate path appear with a "red cross" fix it.

4.4. Creating and using a custom cluster SSL certificate

This SSL certificate is only for the communication between cluster nodes. This is not the public SSL certificate.

This is an optional step to performed **only if requested by your security team because self-signed certificate is not allowed.**

4.4.1. Creating a custom SSL certificate

Caution: this sub-chapter does not intent to present best practices in term of security to create an SSL certificate but only to show an example that works with required elements.

To create a valid root.pfx certificate you must comply with the following constraints:

- The certificate must be trusted and belong to a hierarchy of trusted certificate. Ideally owned by the customer.
- The certificate must embed its private key.
- The certificate must be CA Authority

1. Create a file called ca.cfg that will contain the required characteristic of your SSL certificate.

Adjust settings based on your company constrains.

ca.cfg file content

```
[req]
default_bits = 4096
default_keyfile = db.key
distinguished_name =
req_distinguished_name
req_extensions = v3_ca
extensions = v3_ca
prompt = no
[req_distinguished_name]
C = FR
ST = Paris
L = Paris
O = mega.com
OU = mega.com
CN= localhost
emailAddress =
contact@mega.com
[v3_ca]
basicConstraints =
CA:TRUE
```

2. Create the certificate with these elements. Here is a sample script using openssl to create the certificate.

Create the certificate private key and save it in the file rootCA.key

```
openssl genrsa -out rootCA.key 4096
```

Create a crt file

```
openssl req -x509 -new -nodes -key rootCA.key -days 1024 -config ca.cfg -extensions v3_ca -out rootCA.crt
```

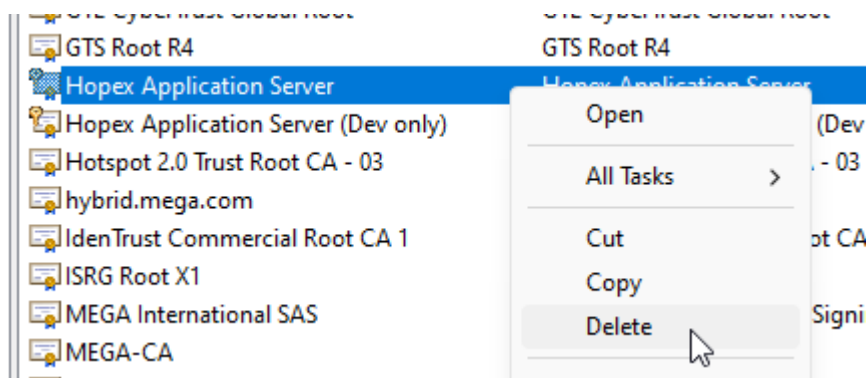
Create an PFX file to be imported in all server of the cluster (HAS+IIS)

```
openssl pkcs12 -export -out root.pfx -inkey rootCA.key -in rootCA.crt
```

4.4.2. Using the custom cluster certificate.

To use the newly created certificate:

1. Clean existing self-signed root.pfx/node.pfx certificate. You may skip this step if you have never installed in HTTPS the cluster.
 - From the HAS Instance Manager stop all cluster instances/nodes.
 - For each **IIS** server and **HAS server** of the cluster:
 - a) Delete file **node.pfx** and **root.pfx** located in the default location here: C:\...\HOPEX Application Server\...\certificates
 - b) From MMC console under **Certificates>Trusted Root Certification Authorities** delete the existing certificate called "HOPEX Application Server" and/or "HOPEX Application Server (Dev Only)"

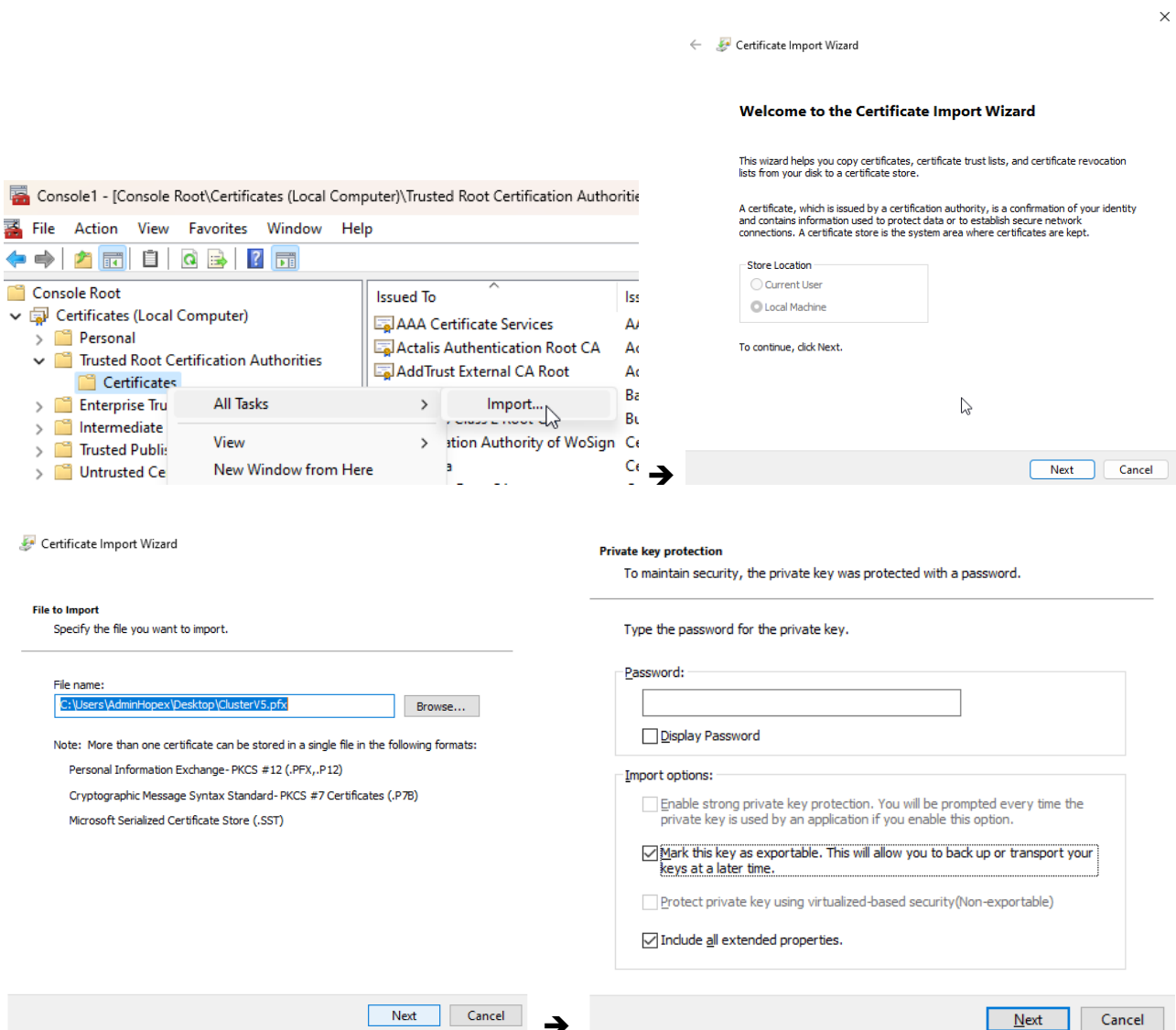


2. Import your new certificate.

For each **IIS** server and **HAS server** of the cluster:

- a) Access **Certificates > Trusted Root Certification Authorities > Certificates** menu, right-click and select **All tasks > Import**. Make sure you import with a user that will give enough privilege to the certificate to be read by HAS later.

- b) Click **Next**.
- c) Browse and select the PFX file you just created.
- d) Click **Next**.
- e) When prompted enter the password for the private key if you have set one (in this example there is no password).
- f) (optional) You may want to select "Mark this key as exportable. This will allow you to back up or transport your keys at a later stage" for future use if you lose the original file.
- g) When prompted make sure to place this certificate in "Trusted Root Certification Authorities".



Certificate Store

Certificate stores are system areas where certificates are kept.

Windows can automatically select a certificate store, or you can specify a location for the certificate.

- ☐ Automatically select the certificate store based on the type of certificate
☒ Place all certificates in the following store

Certificate store:

Trusted Root Certification Authorities

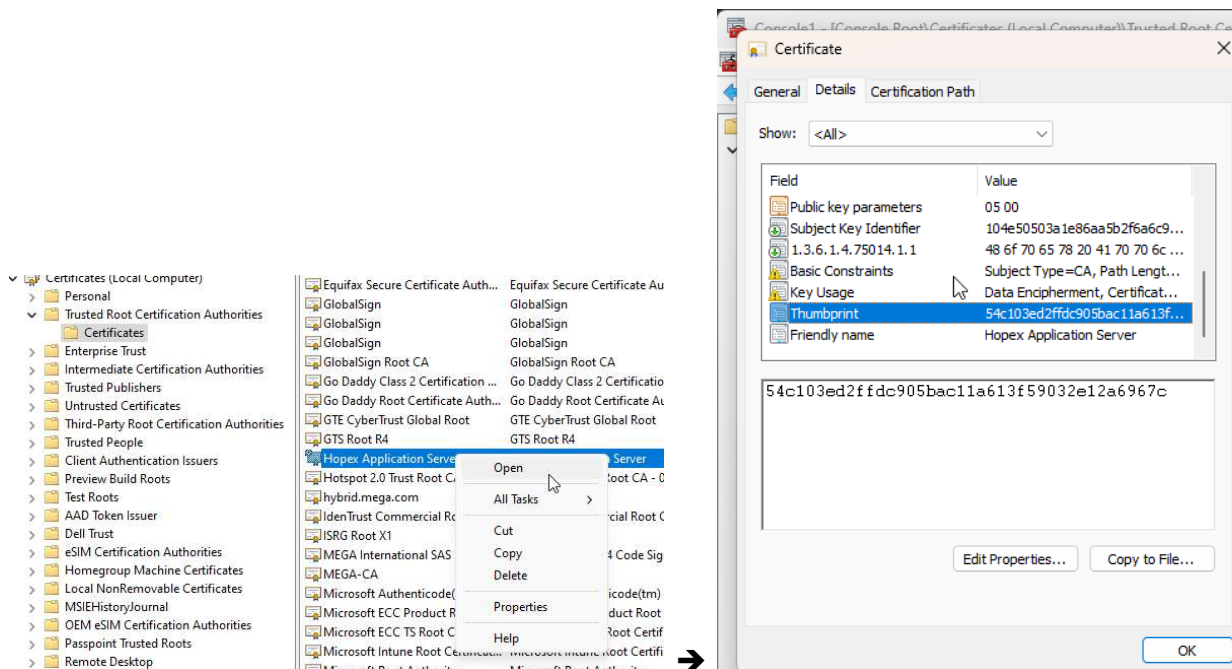
Browse...

Next

Cancel

3. Get the thumbprint of your certificate.

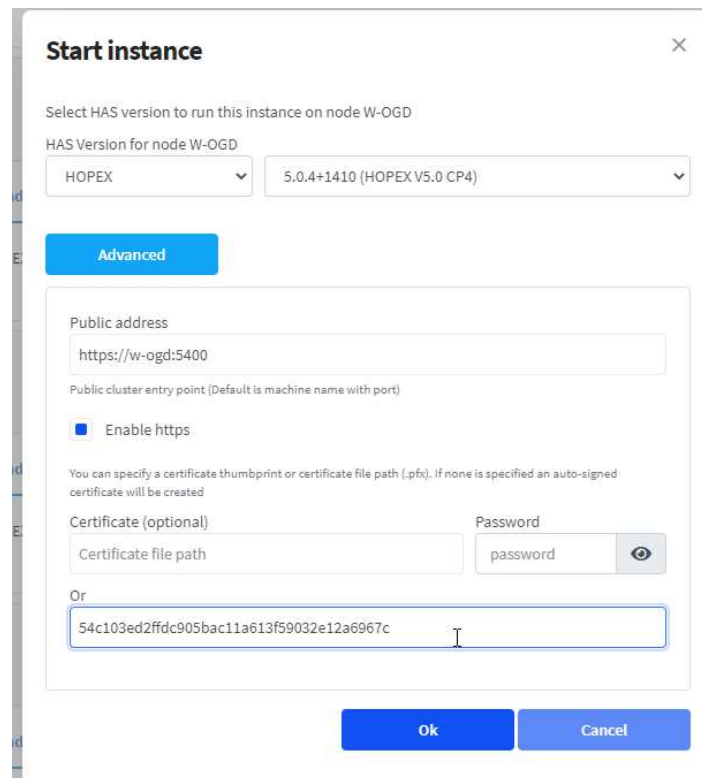
- From the MMC Console, search for your certificate.
- Right-click the certificate and select Open.
- In the **Details** tab, scroll down to **Thumbprint**.
- Copy and save its **Value** for later use.



4. Use the thumbprint within the HAS Instance Manager:

- Connect to HAS Instance manager.
- Click the start button of the first node of the cluster.
- Click **Advanced**.
- Past your thumbprint in the area planned for these purposes. Make sure the certificate file path and password are empty.

- e) Click **OK**.
- f) Wait for the first node to be fully running. Do not continue if this fails.
- g) Repeat the operation on each node of the cluster.



Start instance

Select HAS version to run this instance on node W-OGD

HAS Version for node W-OGD

HOPEX 5.0.4+1410 (HOPEX V5.0 CP4)

Advanced

Public address
https://w-ogd:5400

Public cluster entry point (Default is machine name with port)

☒ Enable https

You can specify a certificate thumbprint or certificate file path (.pfx). If none is specified an auto-signed certificate will be created

Certificate (optional) Password

Certificate file path password

Or

54c103ed2ffdc905bac11a613f59032e12a6967c

Ok Cancel

5. Check everything is OK:

- a) Ensure all HAS instances are running for each node.
- b) Open the settings.cfg files of each node and ensure you see the certificate thumbprint.

```

1 {
2   "instanceId": "bf0ed6ac71cc4f299475e3a65fde24d2",
3   "databaseConnectionString": "$2z8KumUGDmSuYH6Zz9AuQWpZJtprlWXmzsiB6WzPX6SVF2CqauLmcyfr9r6DGI",
4   "mode": "Development",
5   "name": "V5-CP4-Official",
6   "publicAddress": "https://w-ogd:5400",
7   "hopexStoreToken": "$4mkN9wsst4FaB8tAAALAvBMtFkJmeEFfmdaWs4M45LTWse5twjmtBdHuYRkYQQT15z",
8   "hopexStoreAddress": "https://store.mega.com",
9   "certificate": "54c103ed2ffdc905bac11a613f59032e12a6967c",
10  "noSsl": false,
11  "dataFolder": "c:\\MEGA_HAS\\HOPEX Application Server",
12  "webSettings": {
13    "sessionExpirationTime": 20
14  }
15 }
```

4.5. Disabling vulnerable cypher suites

In Windows Server 2019, TLS 1.0 and 1.1, which have known vulnerabilities, are activated by default.

It is highly recommended to disable vulnerable protocols by removing **Schannel** and **cipher suite** from the Windows registry.

You can use one of the following:

- directly from the **Windows registry**

To remove the Schannel and Cipher directly from the Windows registry, see Windows documentation.

- using **IIS Crypto** (**recommended**)

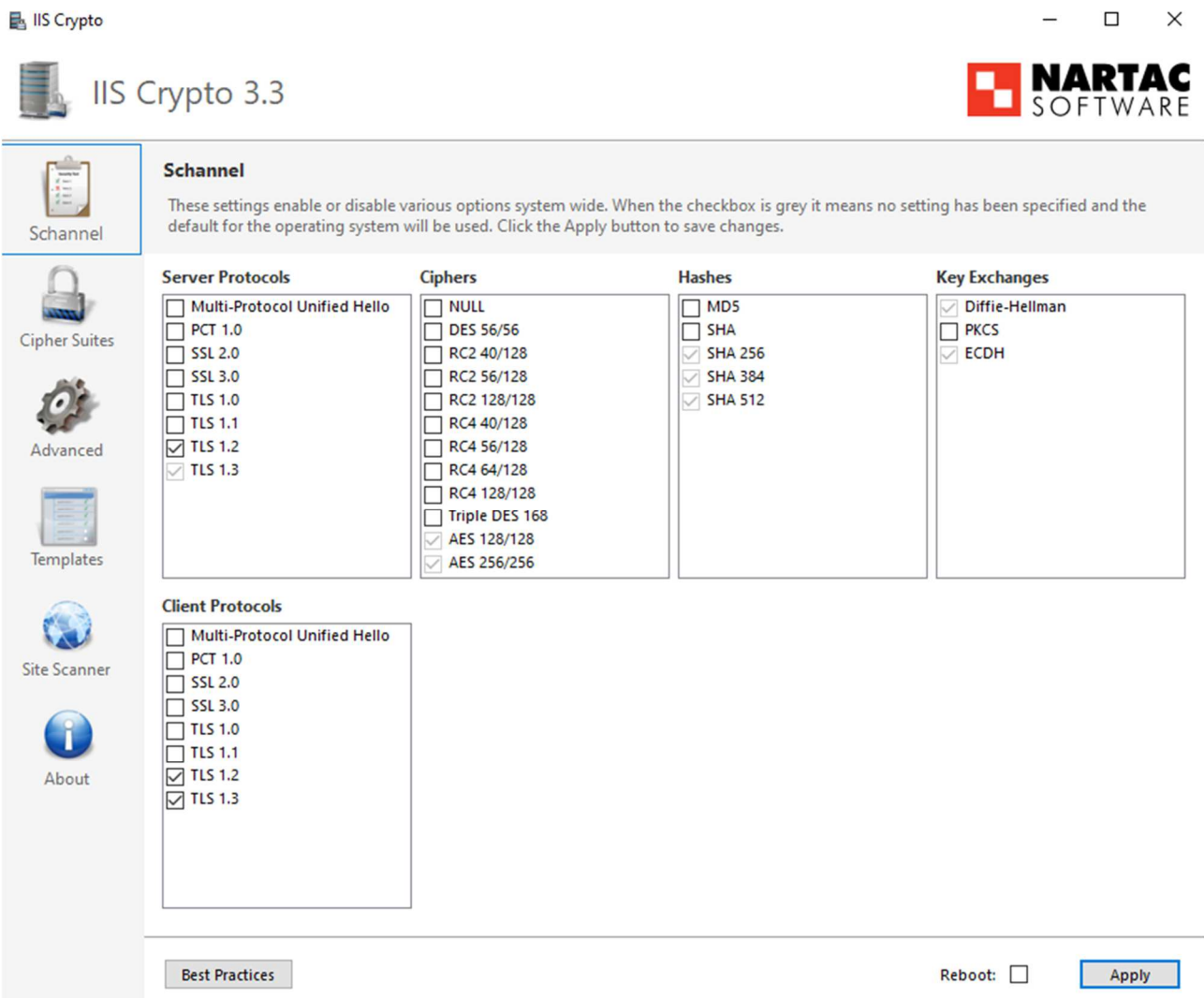
To download IIS Crypto:

<https://www.nartac.com/Products/IISCrypto/Download>.

- using **script**

4.5.1. Disabling vulnerable cypher suites with IIS Crypto

1. Download IIS Crypto: <https://www.nartac.com/Products/IISCrypto/Download>.
2. Connect to **IIS Crypto**.
3. In **Schannel**, disable the vulnerable algorithms and protocols: TLS below 1.2, PKCS, MD5, SHA, DES, and RC4.



The screenshot shows the IIS Crypto 3.3 application window. The title bar reads "IIS Crypto" and "IIS Crypto 3.3". The NARTAC SOFTWARE logo is in the top right corner. The left sidebar contains icons for Schannel, Cipher Suites, Advanced, Templates, Site Scanner, and About. The main area is titled "Schannel" and contains a description: "These settings enable or disable various options system wide. When the checkbox is grey it means no setting has been specified and the default for the operating system will be used. Click the Apply button to save changes." Below this are four sections: Server Protocols, Ciphers, Hashes, and Key Exchanges. Each section contains a list of protocols/ciphers with checkboxes. The "Client Protocols" section is also visible at the bottom. At the bottom right, there are "Best Practices", "Reboot:", and "Apply" buttons.

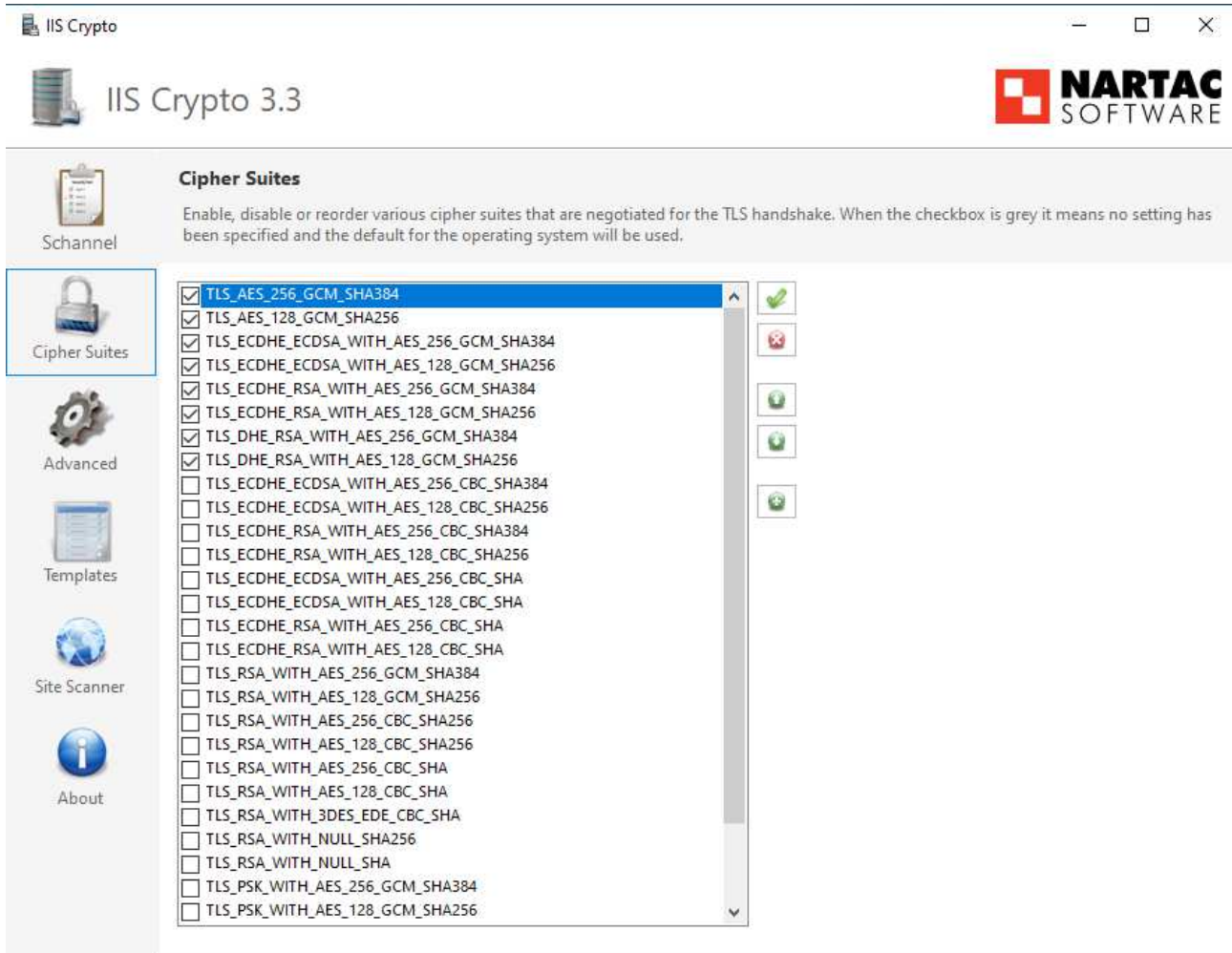
Server Protocols	Ciphers	Hashes	Key Exchanges
<input type="checkbox"/> Multi-Protocol Unified Hello	<input type="checkbox"/> NULL	<input type="checkbox"/> MD5	<input checked="" type="checkbox"/> Diffie-Hellman
<input type="checkbox"/> PCT 1.0	<input type="checkbox"/> DES 56/56	<input type="checkbox"/> SHA	<input type="checkbox"/> PKCS
<input type="checkbox"/> SSL 2.0	<input type="checkbox"/> RC2 40/128	<input checked="" type="checkbox"/> SHA 256	<input checked="" type="checkbox"/> ECDH
<input type="checkbox"/> SSL 3.0	<input type="checkbox"/> RC2 56/128	<input checked="" type="checkbox"/> SHA 384	
<input type="checkbox"/> TLS 1.0	<input type="checkbox"/> RC2 128/128	<input checked="" type="checkbox"/> SHA 512	
<input type="checkbox"/> TLS 1.1	<input type="checkbox"/> RC4 40/128		
<input checked="" type="checkbox"/> TLS 1.2	<input type="checkbox"/> RC4 56/128		
<input checked="" type="checkbox"/> TLS 1.3	<input type="checkbox"/> RC4 64/128		
	<input type="checkbox"/> RC4 128/128		
	<input type="checkbox"/> Triple DES 168		
	<input checked="" type="checkbox"/> AES 128/128		
	<input checked="" type="checkbox"/> AES 256/256		

Client Protocols

<input type="checkbox"/> Multi-Protocol Unified Hello
<input type="checkbox"/> PCT 1.0
<input type="checkbox"/> SSL 2.0
<input type="checkbox"/> SSL 3.0
<input type="checkbox"/> TLS 1.0
<input type="checkbox"/> TLS 1.1
<input checked="" type="checkbox"/> TLS 1.2
<input checked="" type="checkbox"/> TLS 1.3

Best Practices Reboot: ☐ Apply

4. In **Cipher Suites**, disable other weak cipher suites:



For information about cipher suite and vulnerability see: <https://ciphersuite.info/>.

The best hardening is to disable all cipher suites with **cbc** or **no key exchange**. (others were already disabled by **SChannel** configuration).

4.5.2. Disabling vulnerable cypher suites using script

You need to disable those by running the:

- TLS1.0.reg
- TLS1.1.reg
- Triple DES 168.reg
- PCKS.reg
- RC4 128-128.reg

By default others are disabled

These scripts keep some “good but not perfect cipher-suite” suites like some with CBC (no PFS).

Download these scripts from the “Secure server toolkit.zip”.

Make sure the .Net layer will accept to use TLS 1.2:

1. Through the Startup menu, go to “Run” and enter:
regedit.exe
2. Browse through the registry until you reach the following key:

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\.NETFramework\v4.0.30319
3. In that key, create an entry of type DWORD (32 bit) with the following details:

Name: SchUseStrongCrypto
Value: 1

Reboot the server to take everything into account.

5. SQL Server configuration

5.1. Character encoding

Once the database is created, check that "Collation" is set to "**SQL_Latin1_General_CP1_CS_AS**". If the database is created from the HOPEX application (see 3.9.1 Creating a New "HOPEX environment"), the appropriate encoding is automatically configured.

5.2. Database user

You can connect to the database with 2 modes:

- **Native account** → **easier choice**

The connection to SQL server for HAS Instance and HOPEX Core module is done with this user/password from SQL server.

- **Windows/Domain account:** Trusted Connection

The connection is made with the domain user that launch the process. Ensure all users that will launch the desktop application will be defined in SQL Server as well.

5.3. Database connection string

- If you are on a native account, you will use the login/password of SQL.
- If you are on the Windows/Domain account, you will add Trusted_Connection=true in the parameter.
- If you use a secure SQL connection you will need to had TrustServerCertificate=True in the parameter.
- Set the parameter Encrypt=false; or "true" if you use SSL communication. For ODBC Driver 18 the syntax "Encrypt=false;" is mandatory if you do not have SSL communication.

Caution: the value is either true/false or yes/no; In HAS Console the value are true/false in Administration.exe the value are yes/no

5.4. User grants

To run HOPEX Application server the database users need the following privilege and roles.

Common actions performed	<ul style="list-style-type: none"> • Create/Delete Database • Create/Update/Read/Write database structure (tables, procedures, index...) • Read/Write data access
Server roles	dbcreator(1) db_ddladmin db_datawriter db_datareader
Database roles	db_owner or public(2)
Server permissions	view server state

Should you restrict the role of database creation the DBA must create the databases manually following naming convention

(1) for Windows domain account we recommend you remove the db_creator role.

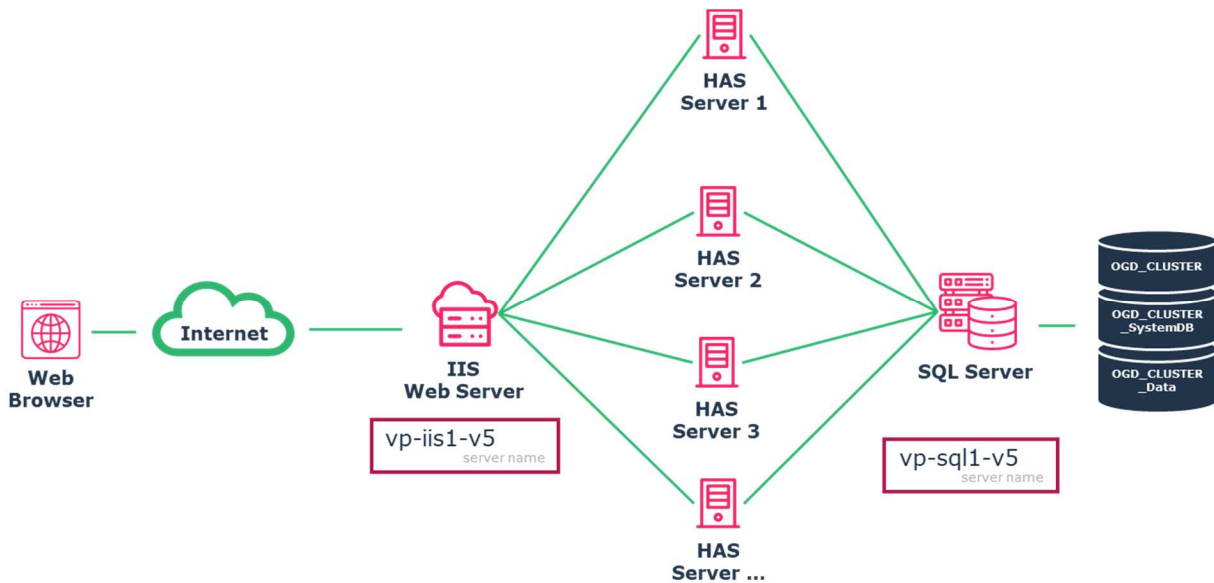
(2) Give public role to restrict access rights

6. Cluster installation

If you are not in a cluster, meaning you have only 1 Server (excluding database) you can skip this chapter.

6.1. Multiple HAS Server

This section details how to define a farm of servers for HAS. This schema represents the deployment to be considered:



This chapter explains the case where you have:

- No load balancer
- 1 server with IIS
- 2 servers for HAS.
- 1 SQL server

Should you have more than 2 HAS servers, repeat the same operation for each additional HAS Server.

Perform the following steps:

- Configure IIS
- Install HAS Server 1 as if it was alone and create the instance with this HAS Server 1
- Install HAS Server 2. Ensure you set the same password for the HAS Instance manager for all HAS Server of the cluster
- On each additional server Join the cluster
- Adjust IIS configuration to add each HAS Server part of the cluster

6.1.1. Step A: Configure IIS

Perform the steps described in chapter:

- 2 [IIS Web Server as if there was only 1 HAS Server](#)

6.1.2. Step B: Install HAS Server 1

Perform the steps described in chapter:

- 3 [HOPEX Application Server \(HAS\) installation](#)
- 4 [SSL Certificates configuration](#)

Ensure that you can perform all the tests described in this chapter:

- 7 [Installation](#)

If any of those web front end does not work (HAS Console, HOPEX Web Front-End), fix it before proceeding.

6.1.3. Step C: Install additional HAS Server 2

Repeat the following actions for each additional HAS Server.

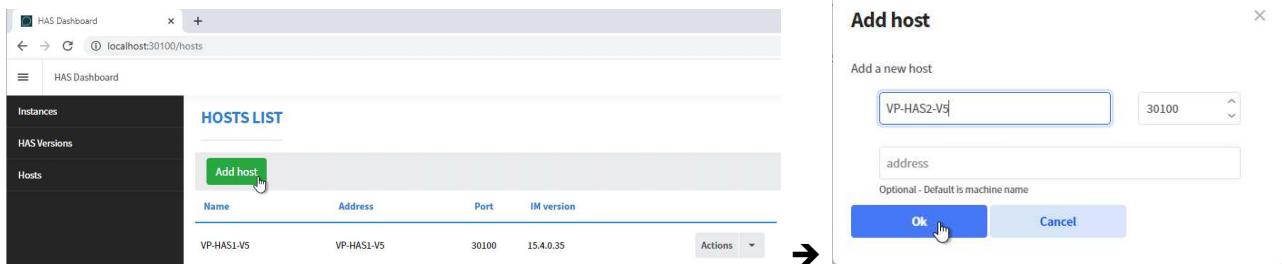
1. Access the additional HAS Server 2.
2. Perform **step 1 to 18** as described section [Installing HAS Instance Manager with the setup](#).
3. Ensure you set the **same api-key password for the instance manager** for all HAS Servers.
4. Ensure you use the **same domain user** to launch HAS Instance Manager.

Do not create any HAS Instance from HAS Instance manager on Server 2

6.1.4. Step D: Join the cluster for each additional HAS Server

Repeat the following actions for each additional HAS Server.

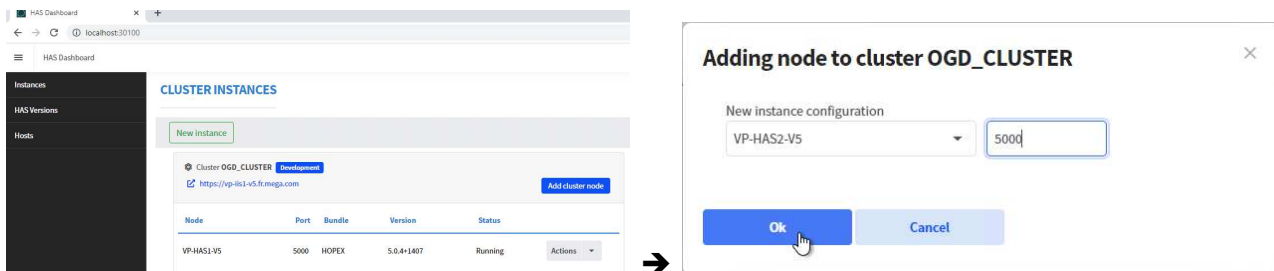
1. Access the HAS Server 1 (the first server you installed).
2. Click **Hosts > add host**.
3. Enter the name of the server HAS Server 2 (no IP address). Keep the same HAS Instance manager port (default 30100).
4. Click **OK**.



5. Click **Instances**

6. Select your installed Instance and click **Add cluster node**

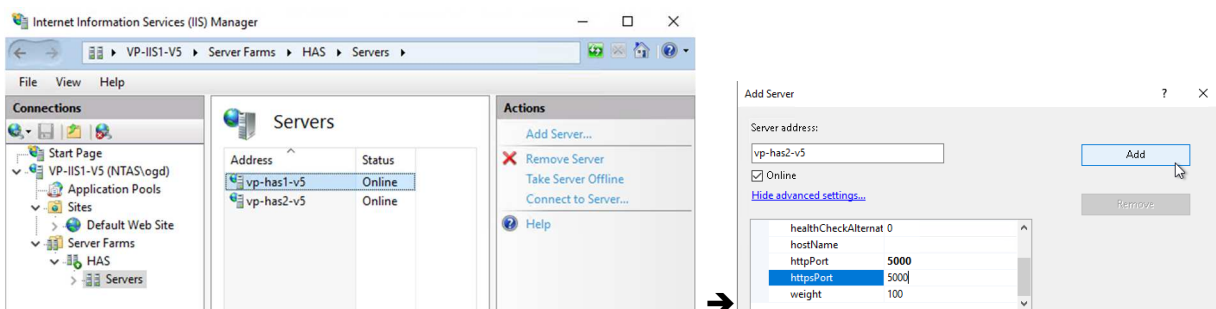
7. Select the HAS Server 2 and port number (use the same port for all cluster node 5000)



6.1.5. Step E: Adjust IIS configuration

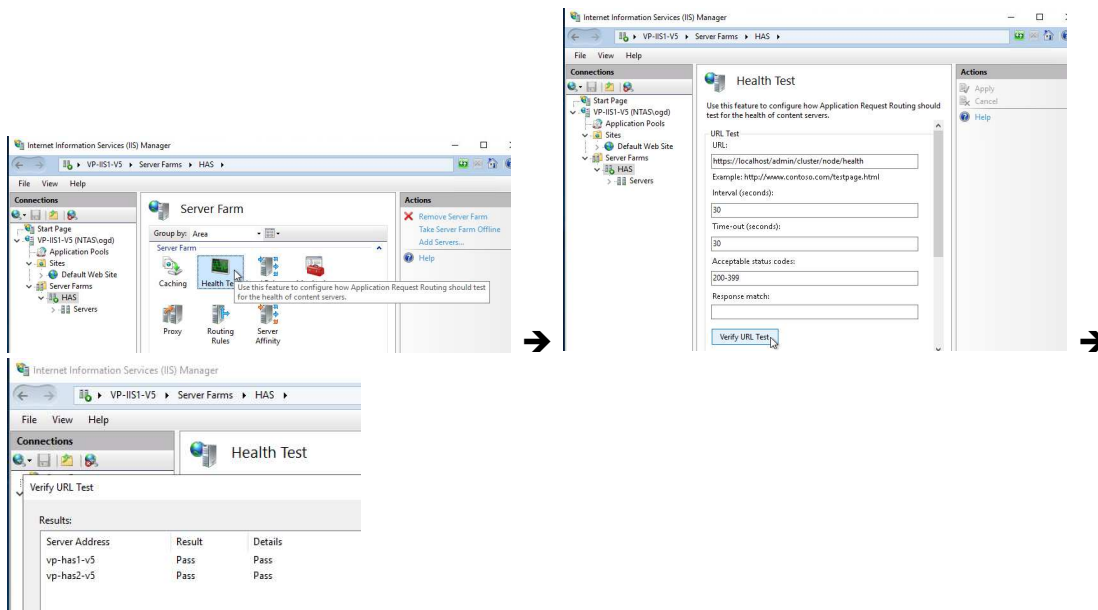
Repeat the following actions for each additional IIS Server.

1. Access the **IIS Server**.
2. Open **IIS Manager**.
3. Expand **Server Farms**.
4. Expand the HAS server farm you have created in previous step.
5. Click **Server**.
6. Click **Add Server** to "HAS Server 2". In that example "vp-has2-v5"
7. Repeat the step described section 2.6.1 Creating a Server farms
8. **Error! Reference source not found.** Scroll to **always put both port** (HTTP/HTTPS).
 - a. Click **Add**.
 - b. Click **Finish**.



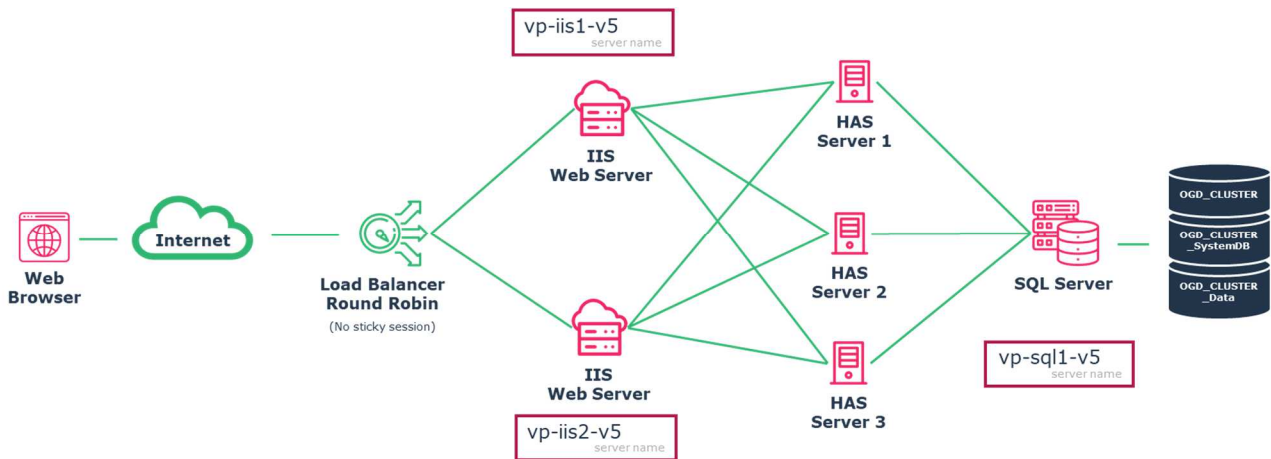
9. Check that all servers of the Cluster passes the **Health Test**.

- Click **Verify URL Test**



6.2. Multiple IIS Server

This chapter details how to define a cluster with multiple IIS. This schema shows the deployment to be considered:



When you have multiple IIS Web Servers, you must add a **load balancer** in front.

You have multiple IIS Web servers because:

- You have IT constraints of redundancy for **high availability**
- You have **thousands of concurrent** users.

If you are not in this situation, you should reconsider having multiple IIS Servers.

Should you have more than 2 IIS Web server, repeat the same steps for each additional IIS Web Server:

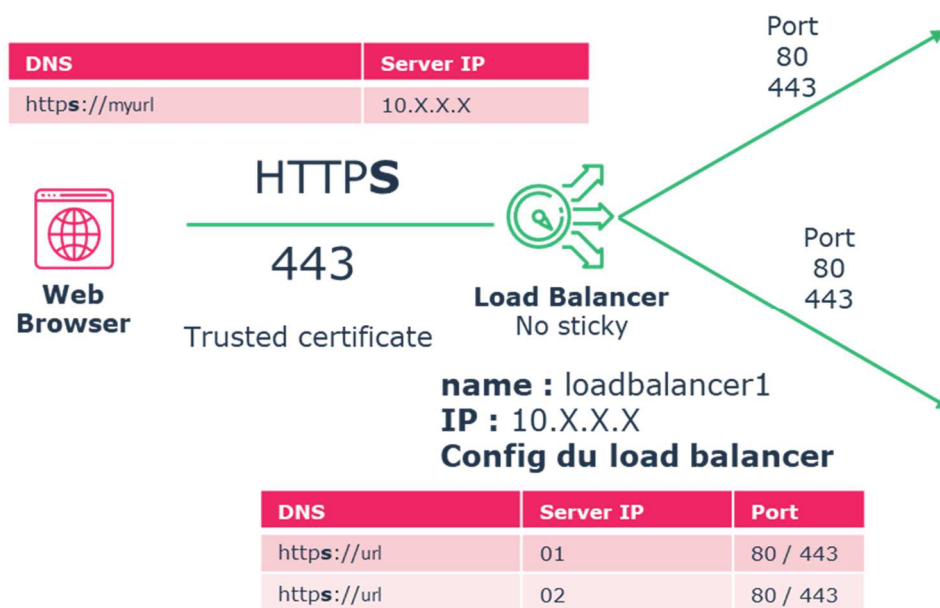
1. Perform the step A to E described in section “6.1 Multiple HAS Server”. Repeat Step E for each IIS Server
2. Configure the load balancer

6.2.1. Configuring the load balancer

Configuration of the load balancer may depend on the chosen load balancer.

Ensure the following steps have been performed:

- The DNS URL is pointing toward the load balancer
- The load balancer has the list of all IIS Web server
- For easiness of deployment, have your load balancer pointing on port 80 and 443 on IIS Web Server.
- The load balancer is set to no sticky session mode.



6.3. Multiple SQL Server

For such High availability of SQL Server, refer to Microsoft documentation about Always on deployment.

With HOPEX there are two main ways the SQL availability features can be used:

- High availability
- Disaster recovery

CAUTION: These are advance configurations for which only SQL Server expert will be able to guide you through such configuration.

For more information see: <https://learn.microsoft.com/en-us/sql/database-engine/sql-server-business-continuity-dr?view=sql-server-ver16>

7. Installation errors and tests

If you have followed the previous chapter about the installation your installation should work properly. Nonetheless, there are area that can prevent the installation to be successful. Follow the steps described below to ensure your installation is good.

All screenshots, in this documentation, are performed with Google Chrome. Error message may vary on Firefox or Edge.

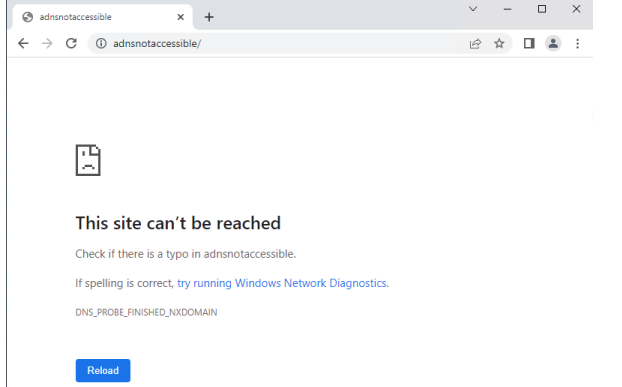
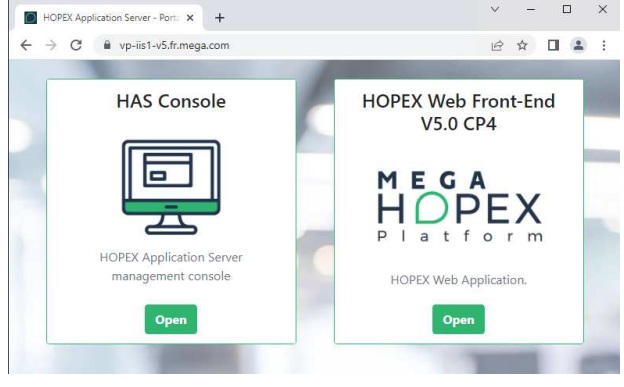
Ensure that:

- all servers of the cluster (IIS+HAS) have access to the public DNS
- all servers of the cluster (IIS+HAS) have valid SSL public certificate otherwise the public certificate must be on all servers.
- the root.pfx certificate is replicated on all servers.
- the file cluster.cfg is identical on each HAS server
- each HAS Instance Manager is launched by the same domain user.

7.1. Testing URL DNS

Ensure that the public DNS is accessible from all servers.

1. Go on **all servers (HAS+IIS)** in RDP session
2. From this RDP session open a **supported web browser**: Chrome, Firefox, Edge.
3. Type your public URL. In this example <https://vp-iis1-V5.fr.mega.com>

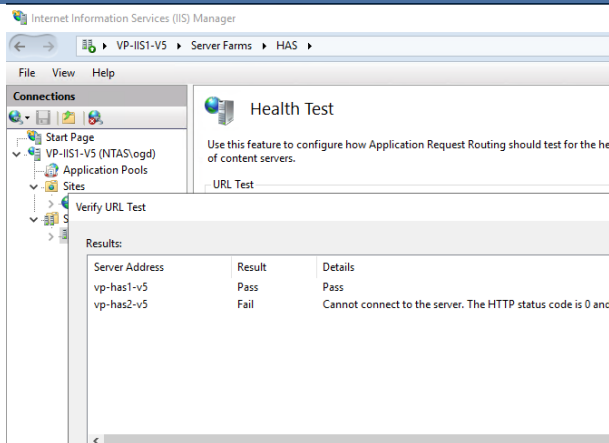
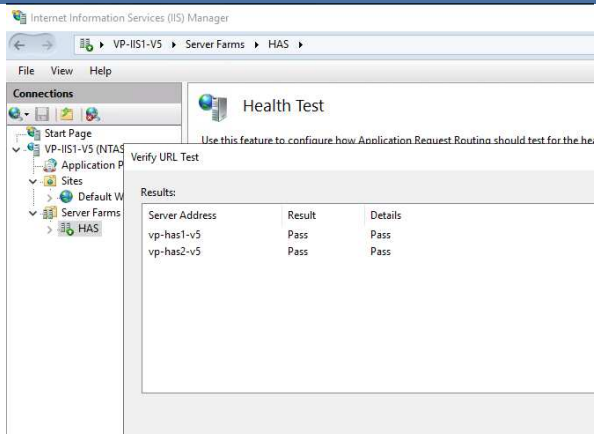
Test Failed	Test Successful
	
<p>This server cannot access your public DNS thus HOPEX will not work properly. Fix it before proceeding.</p>	<p>If you get a 502 error this test is successful, but some other configurations are invalid: see Checking communication between servers.</p>

7.2. Checking communication between servers

7.2.1. From IIS to HAS Servers

Ensure that all HAS Server nodes can be visible from IIS:

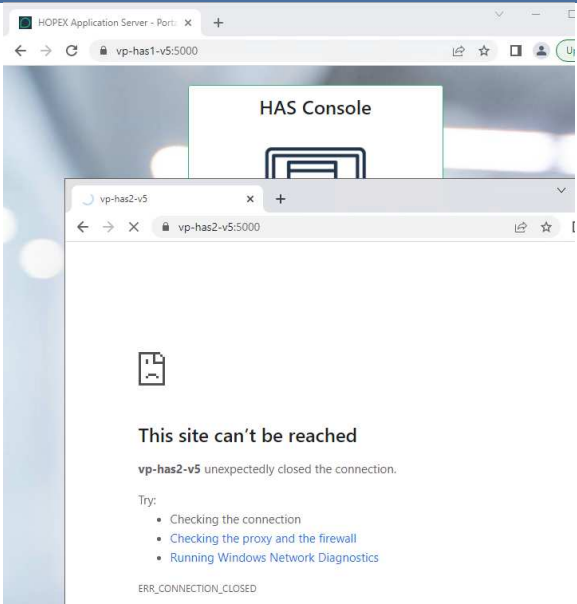
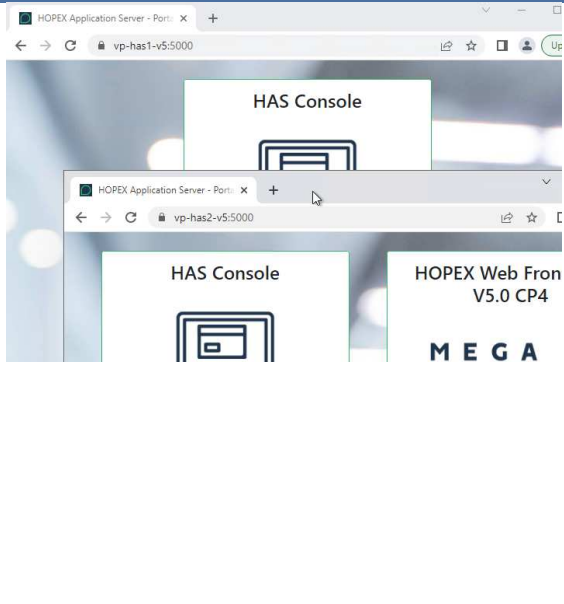
1. Access **each IIS Web Server**.
2. Launch **IIS Management Console**.
3. Go on the **Server Farms**.
4. Go on **Health Test**.

Test Failed	Test Successful																		
 <p>The screenshot shows the IIS Manager 'Health Test' window. The 'Verify URL Test' results table shows:</p> <table><thead><tr><th>Server Address</th><th>Result</th><th>Details</th></tr></thead><tbody><tr><td>vp-has1-v5</td><td>Pass</td><td>Pass</td></tr><tr><td>vp-has2-v5</td><td>Fail</td><td>Cannot connect to the server. The HTTP status code is 0 and</td></tr></tbody></table>	Server Address	Result	Details	vp-has1-v5	Pass	Pass	vp-has2-v5	Fail	Cannot connect to the server. The HTTP status code is 0 and	 <p>The screenshot shows the IIS Manager 'Health Test' window. The 'Verify URL Test' results table shows:</p> <table><thead><tr><th>Server Address</th><th>Result</th><th>Details</th></tr></thead><tbody><tr><td>vp-has1-v5</td><td>Pass</td><td>Pass</td></tr><tr><td>vp-has2-v5</td><td>Pass</td><td>Pass</td></tr></tbody></table>	Server Address	Result	Details	vp-has1-v5	Pass	Pass	vp-has2-v5	Pass	Pass
Server Address	Result	Details																	
vp-has1-v5	Pass	Pass																	
vp-has2-v5	Fail	Cannot connect to the server. The HTTP status code is 0 and																	
Server Address	Result	Details																	
vp-has1-v5	Pass	Pass																	
vp-has2-v5	Pass	Pass																	
<p>If one of the servers has a Result "Fail":</p> <p>➔ Ensure the HTTP/HTTPS is properly configured.</p>	<p>If all of the servers of the farm have a Result "Pass":</p> <p>➔ The communication is successful.</p>																		

7.2.2. Servers to HAS Servers

If you are in a cluster scenario and have several HAS Server.

1. Go on **all servers (HAS+IIS)** in RDP session
2. From this RDP session open a **supported web browser**: Chrome, Firefox, Edge.
3. Open 2 tabs in your web browser and on each tab enter the server internal address. In this example (adjust to your case):
 - Server 1: <https://vp-has1-V5:5000>
 - Server 2: <https://vp-has2-V5:5000>

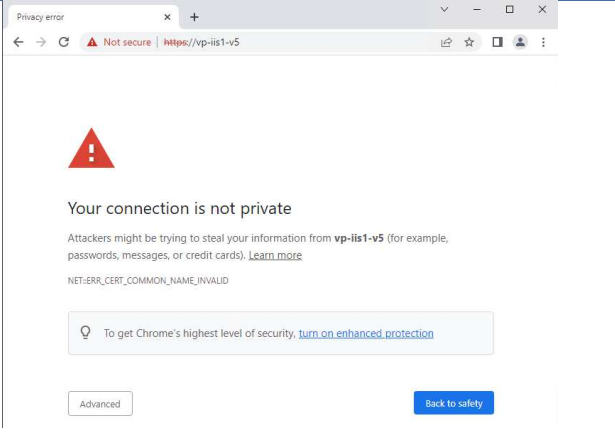
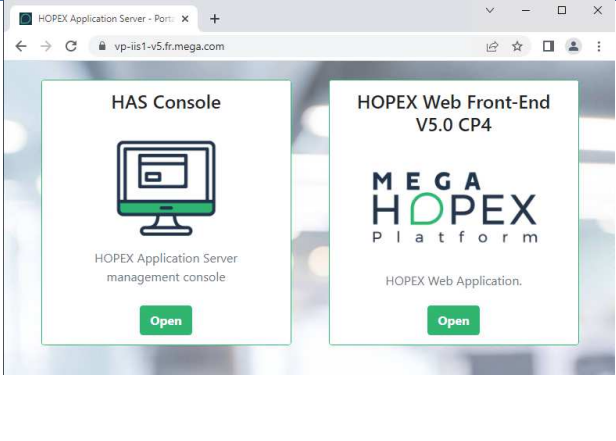
Test Failed	Test Successful
	
<p>➔ Ensure server are visible from each other on the chosen port (default 5000)</p>	<p>➔ This allows you to check that each server is independently started properly</p>

7.3. Testing SSL Certificates

7.3.1. Testing public certificate

To validate that the certificate generated by the customer is valid:

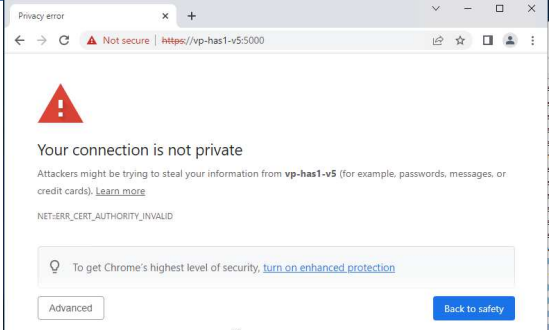
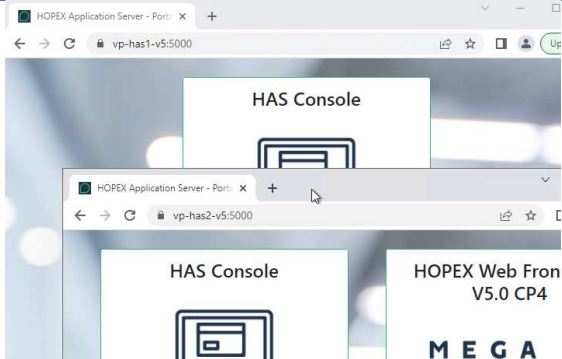
1. Access **all servers (HAS+IIS)** in RDP session
2. From this RDP session open a **supported web browser**: Chrome, Firefox, Edge.
3. Enter your public URL (In this example <https://vp-iis1-V5.fr.mega.com>).

Test Failed	Test Successful
	
<p>If you get this message:</p> <ul style="list-style-type: none"> • Ensure that the URL entered in the web browser is the same as the one defined in the SSL certificate. • Ensure that the SSL certificate is properly imported on all servers (HAS+IIS) windows certificate store. 	

7.3.2. Testing self-signed HAS certificate

To validate that the root.pfx certificate has been properly imported on all servers and that each server has the same root.pfx certificate:

1. Access **IIS Web Server** in RDP session
2. From this RDP session open a **supported web browser**: Chrome, Firefox, Edge.
3. Open 2 tabs in your web browser and on each tab enter the server internal address. In this example (adjust to your case):
 - Server 1: <https://vp-has1-V5:5000>
 - Server 2: <https://vp-has2-V5:5000>

Test Failed	Test Successful
	
<p>If one of the HAS Servers returns a Not Secure certificate:</p> <p>➔ You must fix it.</p>	

4. Repeat the operation:

- Go on HAS Server 1 and test HAS Server 2 access
- Go on HAS Server 2 and test HAS Server 1 access

If any fails to fix it:

1. Stop all HAS Servers.

2. Delete from all servers:

- the file **root.pfx** located in C:\...\MEGA\Hopex Application Server\5000\.certificates
- the certificate called "Hopex Application Server" imported in windows from the **mmc console**

3. Start HAS Server 1.

4. Repeat steps described in section "4.2 Configuring HAS Cluster node SSL Certificate (2)"

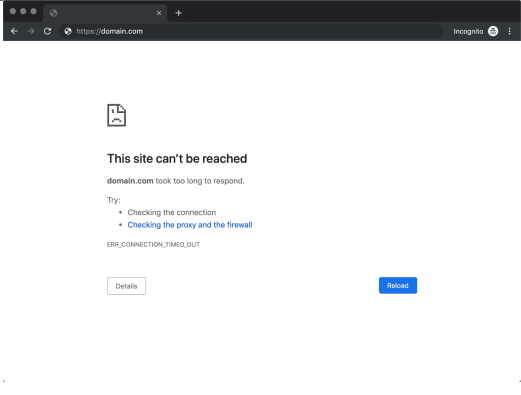
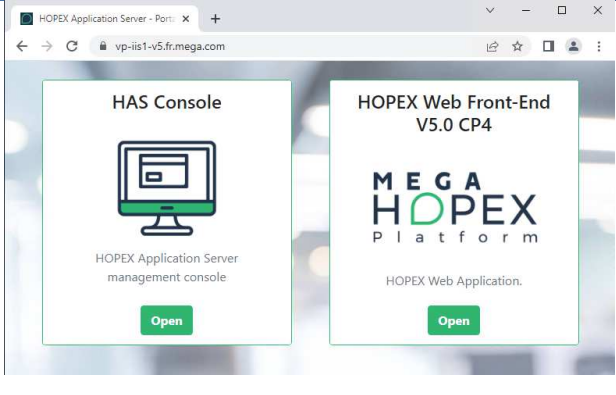
7.4. Testing HAS

7.4.1. Checking port 5000 is available

You may encounter situation where port 5000 is either blocked by a firewall or already in use.

To check port 5000:

1. Open your web browser.
2. Access the private server URL.
 - Server 1: <https://vp-has1-V5:5000>

Test Failed	Test Successful
	
<p>➔ To fix, delete the instance and select another port number.</p>	

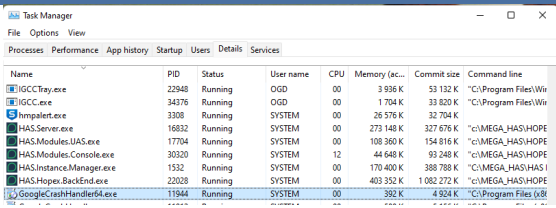
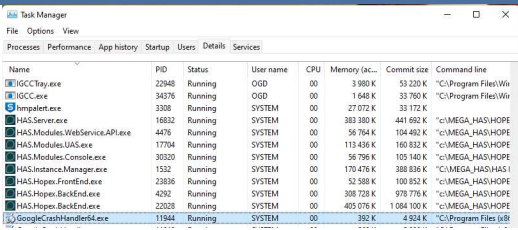
7.4.2. Checking running processes

When successfully running an instance should contain the following windows processes running:

- HAS.Instance.Manager.exe
- HAS.Server.exe
- HAS.Modules.Console.exe
- HAS.Modules.UAS.exe
- HAS.Hopex.BackEnd.exe
 - There should be two of type O and one of type J
- HAS.Hopex.FrontEnd.exe
- HAS.Modules.WebService.API.exe

To check the running processes:

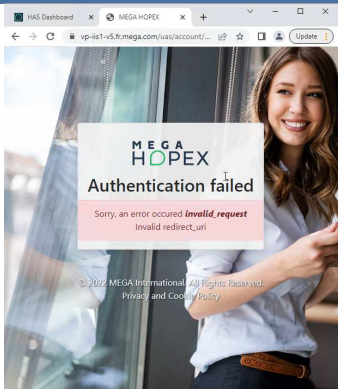
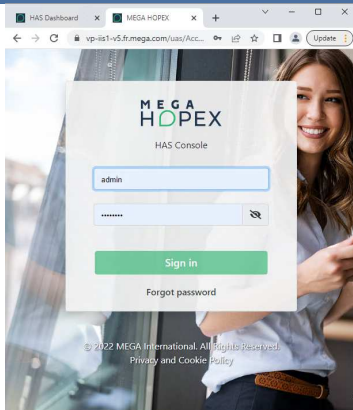
1. Open the **Windows Task Manager**.
2. Select **Details** tab.
3. Ensure you have the **Command line** column enabled.
4. Ensure you have waited enough time to let the processes launched.

Test Failed	Test Successful
 <p>Task Manager screenshot showing failed processes. The list includes: igcc.exe, igcc.exe, hmpa.exe, HAS.Server.exe, HAS.Modules.UAS.exe, HAS.Modules.Console.exe, HAS.InstanceManager.exe, HAS.Hopex.BackEnd.exe, and GoogleCrashHandler64.exe. The status for most processes is 'Running', but the command line for GoogleCrashHandler64.exe is highlighted in blue.</p>	 <p>Task Manager screenshot showing successful processes. The list includes: igcc.exe, igcc.exe, hmpa.exe, HAS.Server.exe, HAS.Modules.WebServiceAPI.exe, HAS.Modules.UAS.exe, HAS.Modules.Console.exe, HAS.InstanceManager.exe, HAS.Hopex.BackEnd.exe, and GoogleCrashHandler64.exe. The status for all processes is 'Running'.</p>
<p>➔ Read the HAS log to understand why the other processes did not start.</p>	

7.4.3. Checking login page

To test the installation

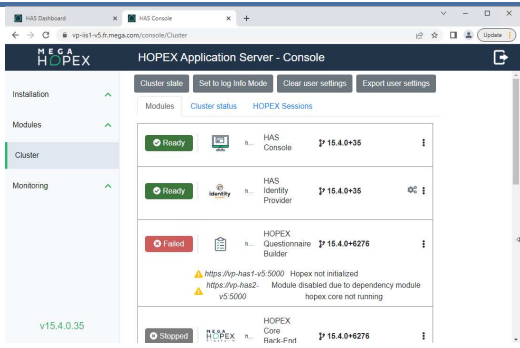
1. Open a **supported web browser**: Chrome, Firefox, Edge. From anywhere you can access the URL (not from the server itself)
2. Enter your public URL. In this example <https://vp-iis1-V5.fr.mega.com>
3. On the portal select either:
 - the HAS Console <https://vp-iis1-V5.fr.mega.com/console>
 - HOPEX Web Front End <https://vp-iis1-V5.fr.mega.com/hopex>

Test Failed	Test Successful
 <p>Screenshot of the MEGA HOPEX Authentication failed page. The message says: 'Authentication failed. Sorry, an error occurred Invalid_request Invalid redirect_uri'. The footer mentions '© 2022 MEGA International. All Rights Reserved. Privacy and Cookie Policy'.</p>	 <p>Screenshot of the MEGA HOPEX HAS Console login page. It shows a login form with fields for 'admin' and a password, a 'Sign in' button, and a 'Forgot password' link. The footer mentions '© 2022 MEGA International. All Rights Reserved. Privacy and Cookie Policy'.</p>
<p>➔ Ensure the URL you wrote in the web browser is the same</p> <p>➔ Ensure the SSL certificate is valid</p> <p>➔ Ensure your SSO configuration is valid</p>	

7.4.4. Login to HAS Console

To conclude that your installation is valid from an **HAS point of view** (regardless of functional modules):

1. Open a **supported web browser**: Chrome, Firefox, Edge. From anywhere you can access the URL (not from the server itself).
2. Enter your public URL. In this example <https://vp-iis1-V5.fr.mega.com>
3. On the portal select:
 - the HAS Console <https://vp-iis1-V5.fr.mega.com/console>

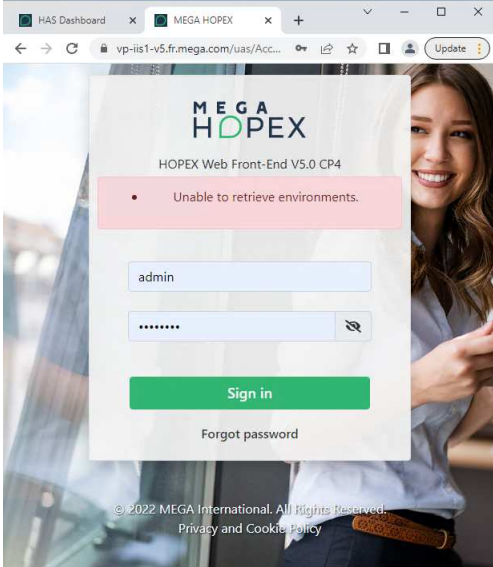
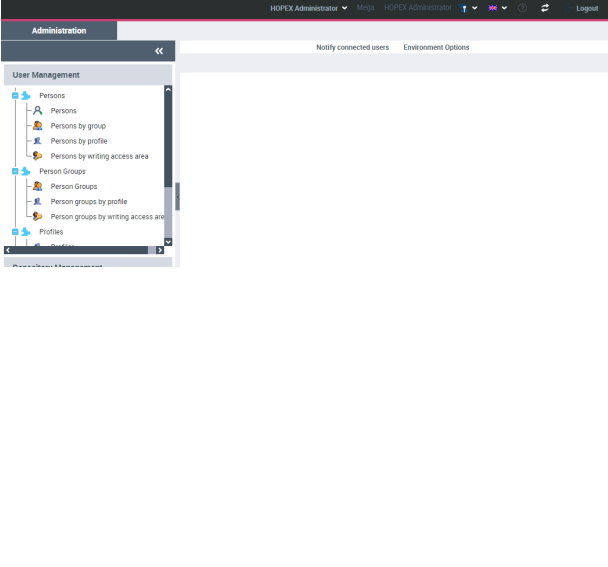
Test Failed	Test Successful
	
→ If you are unable to connect read the log.	

7.5. Testing Web HOPEX

7.5.1. Login to Web Front End

To conclude that your installation is valid from an **end-user point of view**:

1. Open a **supported web browser**: Chrome, Firefox, Edge. From anywhere you can access the URL (not from the server itself)
2. Type your public URL. In my example <https://vp-iis1-V5.fr.mega.com>
3. On the portal select either
 - a. the HAS Console <https://vp-iis1-V5.fr.mega.com/hopex>
4. As a login use "Mega" with default password "Hopex"
5. If prompted select HOPEX Administrator profile.

Test Failed	Test Successful
	
<ul style="list-style-type: none"> ➔ If you are unable to connect read the log. ➔ If you get Unable to retrieve environments, ensure the domain user has the right password or access right to shared folder. 	

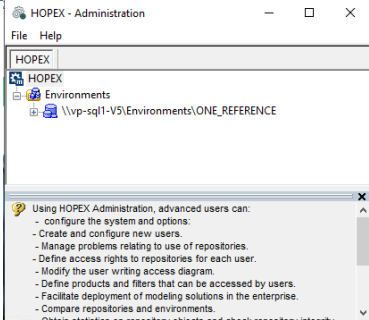
7.6. Testing Desktop client

Complementary to testing the Web part you need to test the Desktop part as well. This desktop part is used mainly for development platform. if it doesn't work it can be a sign of an improper installation.

7.6.1. Login to Administration.exe

This is to validate that HAS Server node has been properly configured.

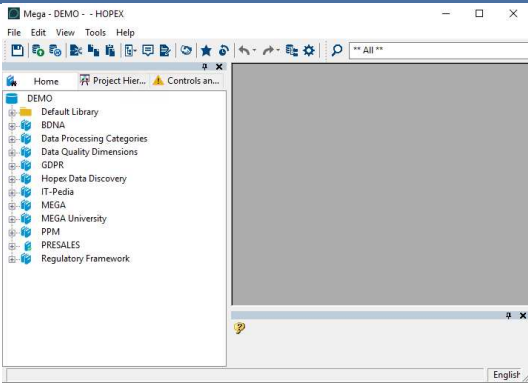
1. Go on **all HAS servers** in RDP session.
2. Go in the installation folder. Default: C:\...\HOPEX Application Server\5000
3. Launch Administration.exe

Test Failed	Test Successful
<p>The process does not launch and closes immediately</p> <p>Or</p> <p>The process launches with error message</p>	
<ul style="list-style-type: none"> ➔ Read Windows Event logs ➔ Read megaerrr logs ➔ Ensure HAS Server is up and running ➔ Ensure access to must license works 	

7.6.2. Login to HOPEX.exe

To validate that HAS Server node has been properly configured:

1. Go on **all HAS servers** in RDP session.
2. Go in the installation folder. Default: C:\...\HOPEX Application Server\5000
3. Launch HOPEX.exe.
4. Login "Mega" with default password "Hopex".

Test Failed	Test Successful
<p>The process does not launch and closes immediately</p> <p>Or</p> <p>The process launches with error message</p>	
<ul style="list-style-type: none"> ➔ Read Windows Event logs ➔ Read megaerrr logs ➔ Ensure HAS Server is up and running ➔ Ensure access to must license works 	

8. Installation in multi-tenant scenarios

HOPEX supports multi-tenant at infrastructure level. A same server can be used to host several customers.

Multi-tenant capability is not supported at the following levels:

- database

Each database is independent and do no share tables/columns/data.

➔ This ensures highest security for our customers' data.

- application

Each deployment is autonomous and do not share exe or dll.

➔ This enables to have customers in different versions and updates.

Multi-tenant capabilities are available to manage:

- multiple environments or instance.
- multiple versions on the same server.

8.1. Multi-environments – Multi-instances

HOPEX V5 supports multiple installations on the same server. This type of deployment is useful when you:

- want to put the PRED-PROD and PROD on the same server.
- have several HOPEX Environments (SystemDb) for historical reason.

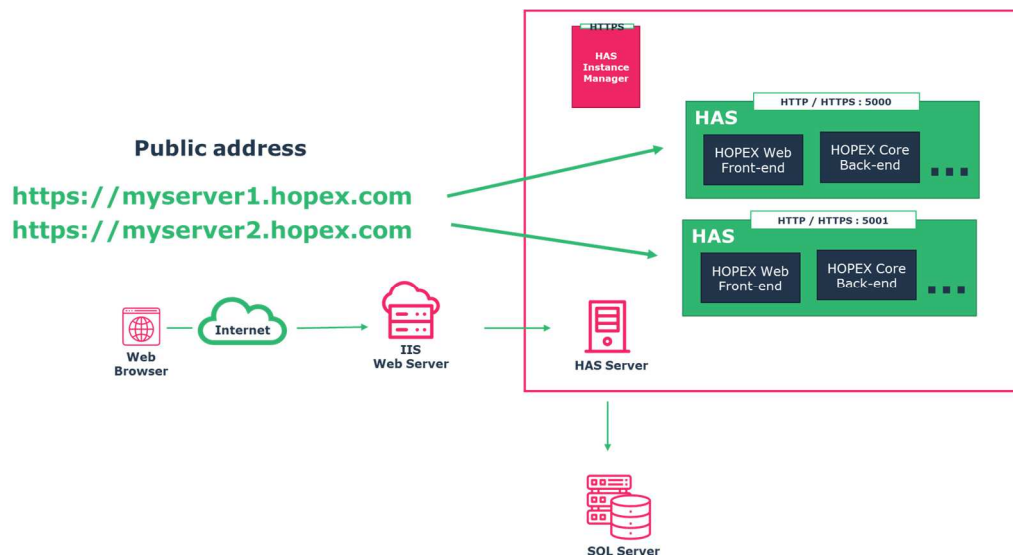
For new customer, this scenario is not recommended.

When doing so you need to adjust IIS configuration to run properly this type of deployment.

Moreover, make sure you size the server accordingly. Each additional instance on a server requires a minimum of 8Gb of RAM.

The architecture pattern of such installation is the following:

- each Instance as a dedicated DNS
- each instance as a dedicated port allocated



The installation of HAS Server:

- is the same process as described in previous chapters.
- You may need to adjust the IIS configuration described from previous chapter as described below.

8.1.1. Configure IIS

8.1.1.1. Public DNS and SSL for each instance

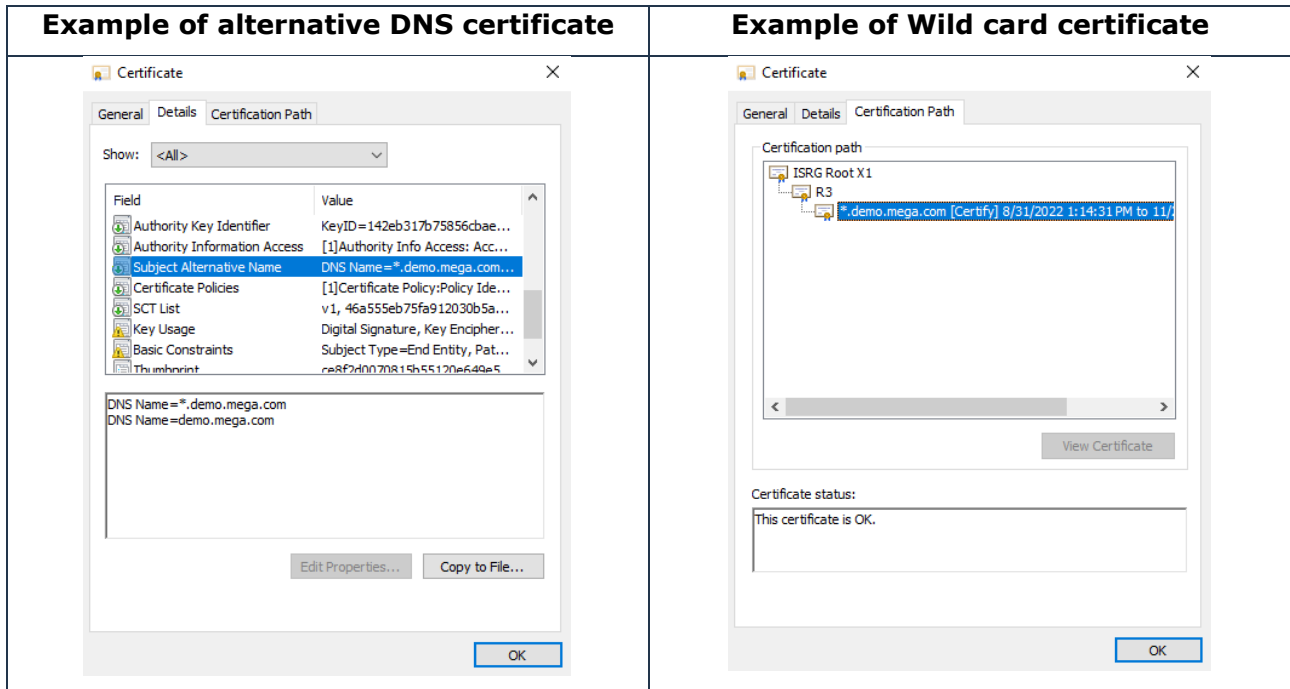
For each instance you must have a DNS.

For example:

- Instance 1 – PROD: <https://prod.hopex.com>
- Instance 2 – PRE-PROD: <https://preprod.hopex.com>

Moreover, your SSL Certificate must be valid for both DNS, so either you have:

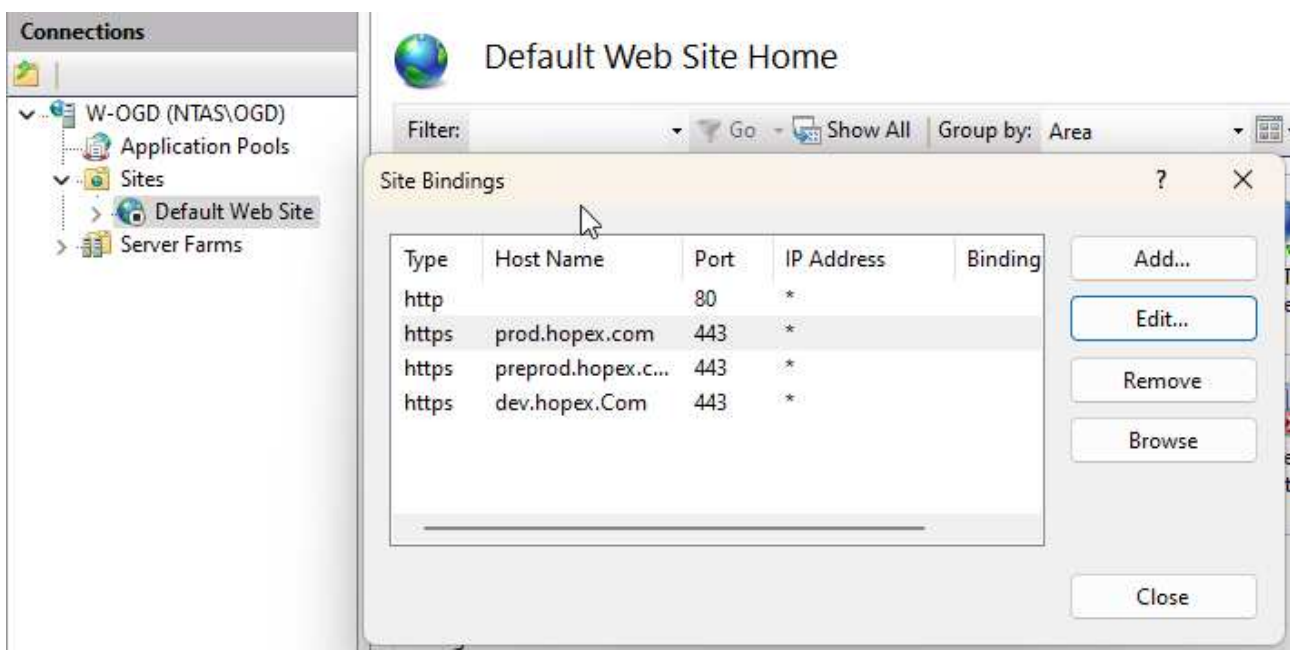
- a wild card SSL certificate. Example: *.hopex.com
- all the alternative DNS name defined in your certificate prod.hopex.com, preprod.hopex.com...



If you do not have a wildcard certificate you need to add extra binding in your IIS website. In that case:

1. Go on your Default Web site.
2. Right-click and Edit Binding.
3. Add a binding for each URL.
4. Enter a Hostname for each URL that matches the SSL Certificate.

Example:



8.1.1.2. Create a server Farm for each instance

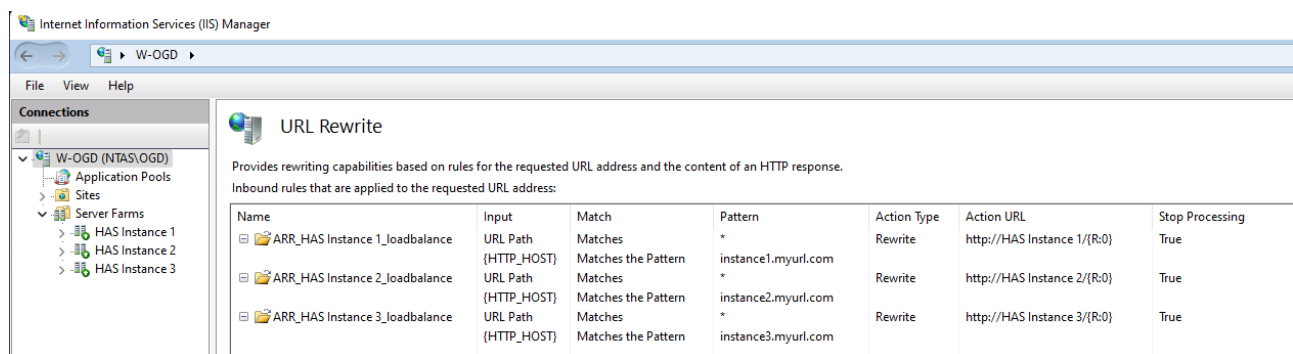
For each Instance you must create a server farm as described section "2.6 [Configuring Server Farm - ARR](#)"

Make sure you enter the right port number. In doubt check the IIS config file as described section "2.8.3 [Checking configuration \(optional\)](#)"

8.1.1.3. Create a rewrite rule for each instance

For each Instance, you have an URL Rewrite rule that you need to ensure has the proper condition.

Example with 3 instances. You can see 3 farms, 3 URL Rewrite rule that each have a condition.



The screenshot shows the IIS Manager console with the 'URL Rewrite' feature selected. The left pane shows the tree structure: W-OGD (NTAS\OGD) > Application Pools > Sites > Server Farms > HAS Instance 1, HAS Instance 2, HAS Instance 3. The right pane displays a table of inbound rules.

Name	Input	Match	Pattern	Action Type	Action URL	Stop Processing
ARR_HAS Instance 1_loadbalance	URL Path (HTTP_HOST)	Matches	*	Rewrite	http://HAS Instance 1/(R:0)	True
ARR_HAS Instance 2_loadbalance	URL Path (HTTP_HOST)	Matches the Pattern	instance1.myurl.com	Rewrite	http://HAS Instance 2/(R:0)	True
ARR_HAS Instance 3_loadbalance	URL Path (HTTP_HOST)	Matches the Pattern	instance2.myurl.com	Rewrite	http://HAS Instance 3/(R:0)	True
	URL Path (HTTP_HOST)	Matches the Pattern	instance3.myurl.com	Rewrite		

8.1.2. Domain users

The domain user used is the same for all the instances. So, this domain user must have access to:

- all HOPEX Environment shared folders and Must license
- the database in case of Trusted Connection.

8.2. Multi-version scenario

This scenario concerns the following situation:

- If you are migrating or want to preview some features without changing you existing version.
- If you are a partner or a developer, you may need to work alternatively with different version of HOPEX. In that context you may want to have several versions installed: V5 CP2, V5 CP3, V5 CP4...

This installation of this scenario is the same as the multi-environment / multi-instance.

Just ensure the **HAS Instance manager is its latest version** and that you have all the prerequisites that correspond to each version you want to use.

HAS Dashboard

Instances
HAS Versions
Hosts

CLUSTER INSTANCES

New instance

Cluster V5-CP0-Official
Development
<https://w-ogd:5000>
Add cluster node

Node	Port	Bundle	Version	Status	
W-OGD	5000	HOPEX	5.0.0+710	Stopped	Actions

Cluster V5-CP1-Official
Development
<https://w-ogd:5010>
Add cluster node

Node	Port	Bundle	Version	Status	
W-OGD	5010	HOPEX	5.0.1+384	Stopped	Actions

Cluster V5-CP2-Official
Development
<http://w-ogd:5020>
Add cluster node

Node	Port	Bundle	Version	Status	
W-OGD	5020	HOPEX	5.0.2+768	Stopped	Actions

MEGA International, Copyright © 2022 Version: 15.5.0.4 [HOPEX Store](#)

Recommendations:

- Give explicit name to the cluster
- Give port number to ease understanding which version you are looking at.

For example, set port 5100 for V5 CP1, 5200 for V5 CP2, 5210 for V5 CP1 HF1...
Caution some port may be already in use by other applications.

9. Other installation topics

This section corresponds to specific use case.

9.1. Using Server API

If you are coming from a previous MEGA HOPEX version, you might have used our server API. This server API in VB, JAVA or C# enables to run external programs and communicate with HOPEX. If you have not used this **Server API**, use our **REST API** and ignore this section.

To enable this Server API, you must reference your installation in Windows registry.

CAUTION: There can be only one instance reference in the registry at a time.

Steps to perform:

1. Go in your installation folder. Default: C:\ProgramData\HOPEX Application Server\5000
2. Run the PowerShell script "HOPEX-regserver.ps1". You must run it with sufficient privilege:
 - Rights to run PowerShell script
 - Rights to write in the Windows Registry.
3. Repeat this operation each time you install an HF / CP or major version.

9.2. Publishing Static Website

Read this section if you are creating and publishing static website with HOPEX.

In HOPEX V5 you can publish a static website:

- directly in HOPEX Application Server → **recommended choice**.
- in IIS as a web application

9.2.1. Publish In HAS Instance

For this scenario either:

- From the **HOPEX Store**, download the Enterprise Portal Application package <https://store.mega.com/modules/details/website.static.navigator.bundle>
- From the **HAS Console > Modules**, install the "Enterprise Portal Application package" module.

Follow the instruction from the store and read the Read.me file located here
C:\...\HOPEX Application Server\...\shadowFiles\website.static.content

When your static website is generated, it can be accessed from the HAS portal or directly from the URL <https://www.myurl.com/website.static.navigator>

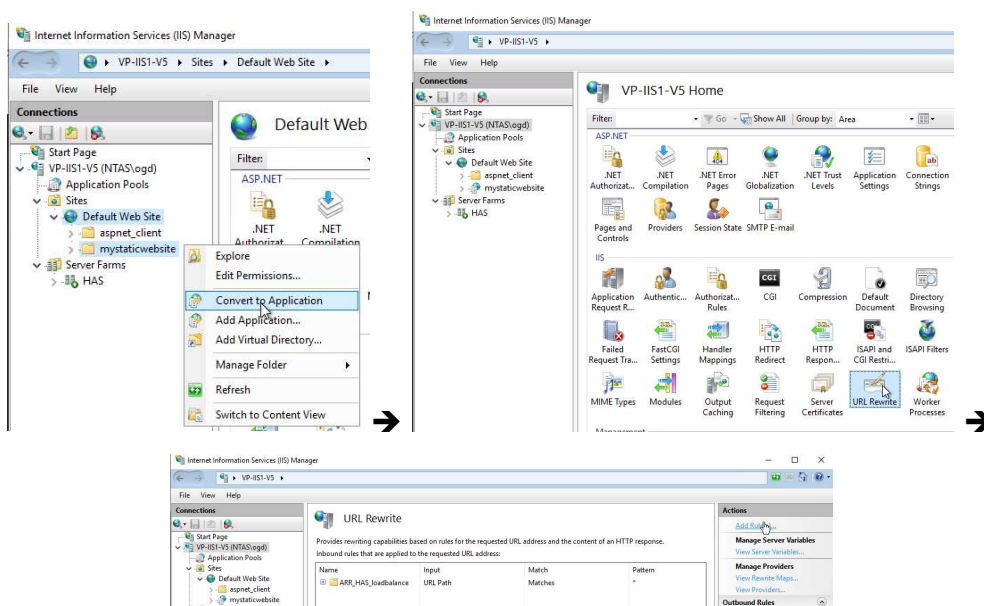


9.2.2. Publish In IIS

In this scenario you generate your static website and then manually publish it on IIS. You need to configure IIS to enable user to access this website.

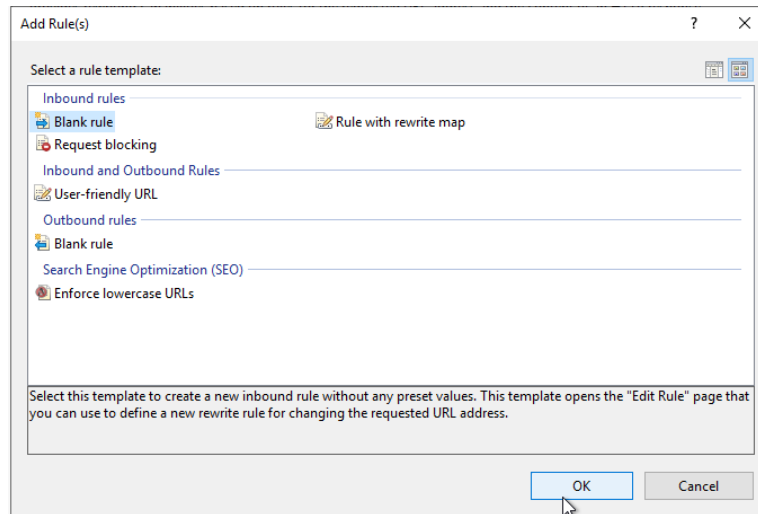
To configure IIS:

1. Create your IIS Application from the folder by concerting it to Application.
2. Go to root level in IIS and double-click **URL Rewrite**.
3. Click **Add Rule**.



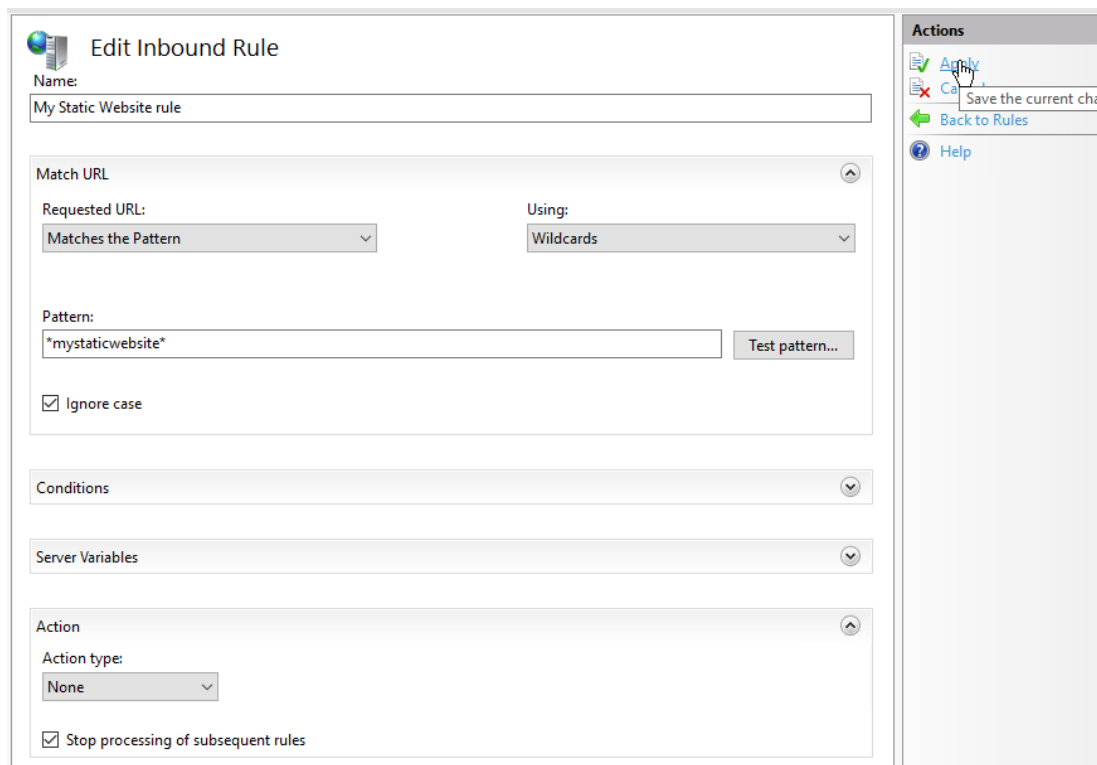
4. Select **Blank Rule**.

5. Click **OK**.

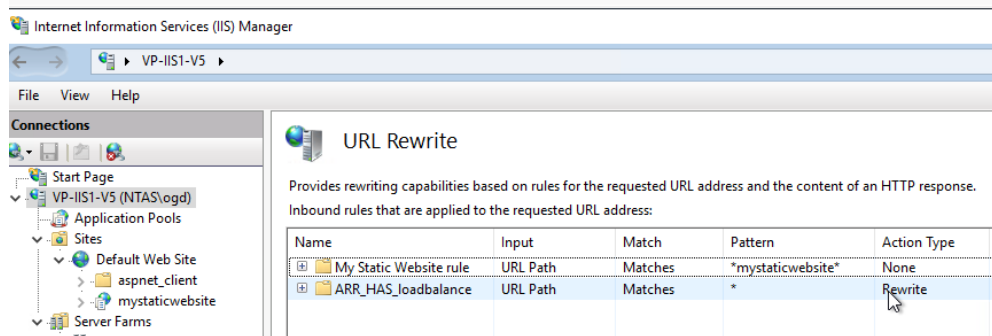


6. Fill in the rule

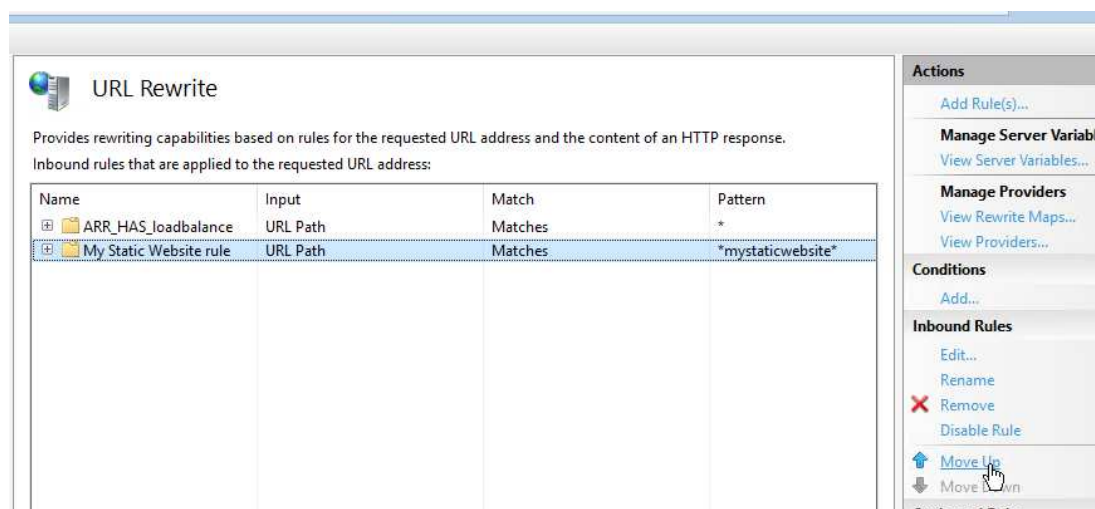
- **Name**
- **Using:** "Wildcard"
- **Pattern:** "*mystaticwebsite*" where mystaticwebsite is the name of the folder in IIS of your website
- **Action Type:** "None"
- Select **Stop processing subsequent rule**.
- Click **Apply**.



7. In the list of rules select the rule you just created.



8. Click **Move Up** until your rule is at the top of the list.
9. Access your static website from your preferred web browser. For example: <https://www.myurl.com/mystaticwebsite>



10. Post installation checklist

Review this checklist before calling MEGA support.

Ensure each line is marked as “**done**”. For each item where the status is “**not done**”, refer to the appropriate section to fix it.

	Layer	Action to check	Status
1	SQL Server	Microsoft SQL Server version: 2019 or 2022	
2	SQL Server	The port used by SQL Server: TCP 1433 UDP1434	
3	SQL Server	Does SQL Server use encrypt connection?	
4	SQL Server	Does SQL user is properly defined?	
Repeat for each server			
10	IIS Server	Windows Server version: 2016 or 2019 or 2022	
11	IIS Server	SSL Certificate validity date (<i>if HTTPS/SSL</i>)	
12	IIS Server	URL based on certificate is the same as on the web browser	
13	IIS Server	IIS Default Website Binding port is 80 or 443	
14	IIS Server	HAS Server farm exist	
15	IIS Server	All HAS Server are present in the HAS Server Farm	
16	IIS Server	Health test URL is defined	
17	IIS Server	Proxy timeout value is set to 120s	
18	IIS Server	There is a URL rewrite rule for the server farm	
19	IIS Server	There is an URL rewrite rule condition with HTTP_HOST	
20	IIS Server	The URL rewrite rule is in HTTP or HTTPS	
21	IIS Server	Ensure HTTP(S) is the same on URL Rewrite, Binding and Health	
22	IIS Server	Testing the URL DNS work as described in chapter 7.1	
23	IIS Server	Testing server communication work as described in chapter 7.2	
243	IIS Server	Testing SSL Certificate works as described in chapter 7.3	
Repeat for each server			
30	HAS Server	Windows Server version: 2016 or 2019 or 2022	
31	HAS Server	.net 6 Hosting Bundle is installed	
32	HAS Server	.net 6 SDK is installed for DEV Server	
33	HAS Server	.net Framework 4.8 is installed	
34	HAS Server	C++ Redistributable x64 2015-2022 is installed	
35	HAS Server	Ensure SMB is enabled / File Server	
36	HAS Server	ODBC Driver 17 or 18 for SQL Server x64 is installed	
37	HAS Server	non-interactive Desktop Heap min. value: 8192	
38	HAS Server	The server has access to the store web URL (optional)	
39	HAS Server	HAS Instance Manager service in present	
40	HAS Server	HAS Instance Manager service is launched by domain user or Local System	
41	HAS Server	HAS Instance Manager is accessible http://localhost:30100	
42	HAS Server	The domain user is local Administrator of the server	
43	HAS Server	The domain user as access to share folder (license & Env.)	
44	HAS Server	The instance is created and running in Instance Manager	
45	HAS Server	The instance is properly deployed in 5000 folder.	
46	HAS Server	The instance internal URL is responding	
47	HAS Server	The public URL written in the web browser is the same as in the SSL certificate and the same as in the settings.cfg	
48	HAS Server	All settings.cfg file are identical across all HAS Server	
49	HAS Server	All cluster.cfg file are identical across all HAS Server	
50	HAS Server	Testing HAS work as described in chapter 7.4	
51	HAS Server	Testing Web client work as described in chapter 7.5	
52	HAS Server	Testing Desktop client work as described in chapter 7.6	
60	Client Laptop	You have Chrome/Firefox/Edge in supported version	

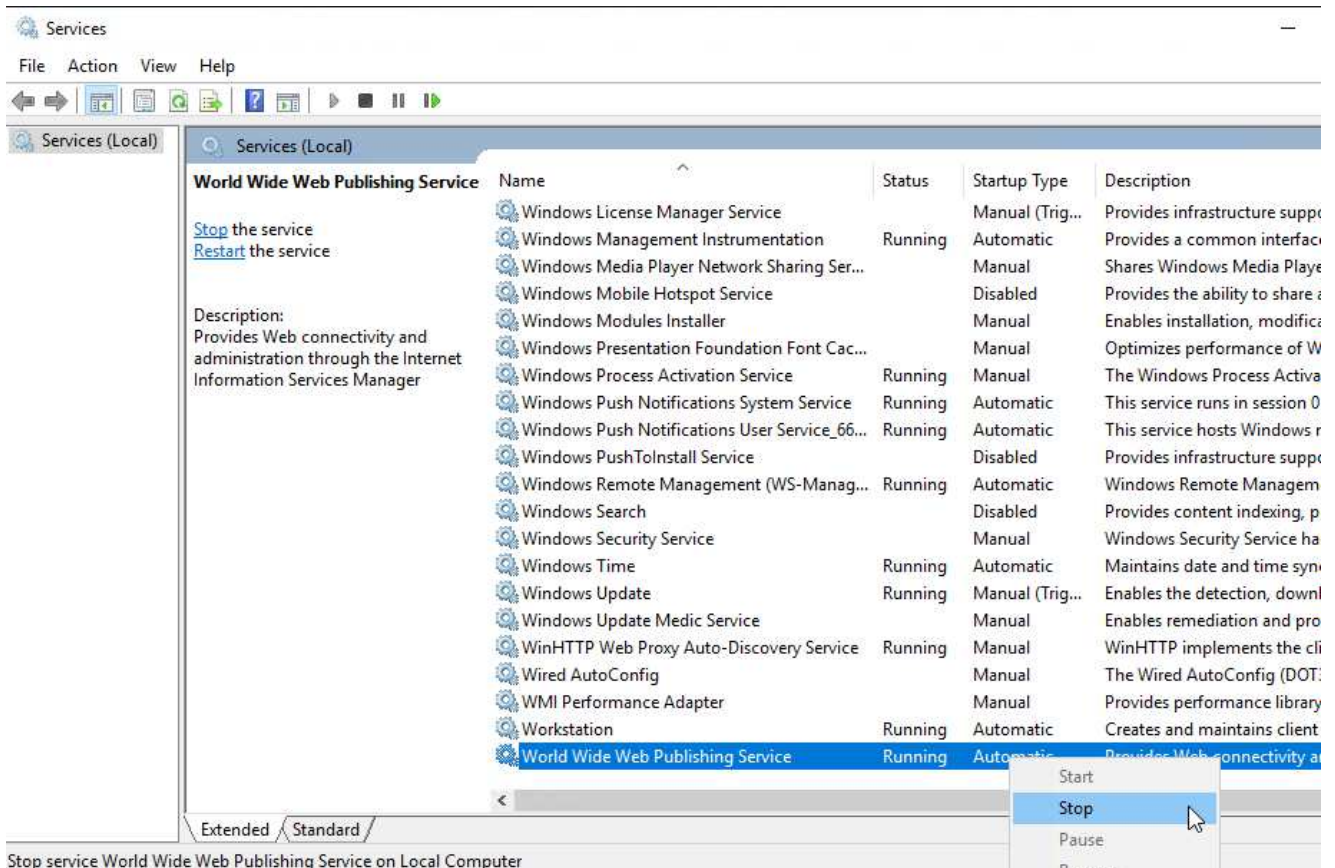
	Layer	Action to check	Status
61	Client Laptop	You have Office tools Word (optional)	

11. Uninstallation procedure

Should you want to remove HOPEX to make a clean re-install please follow the instructions below.

11.1. Removing IIS

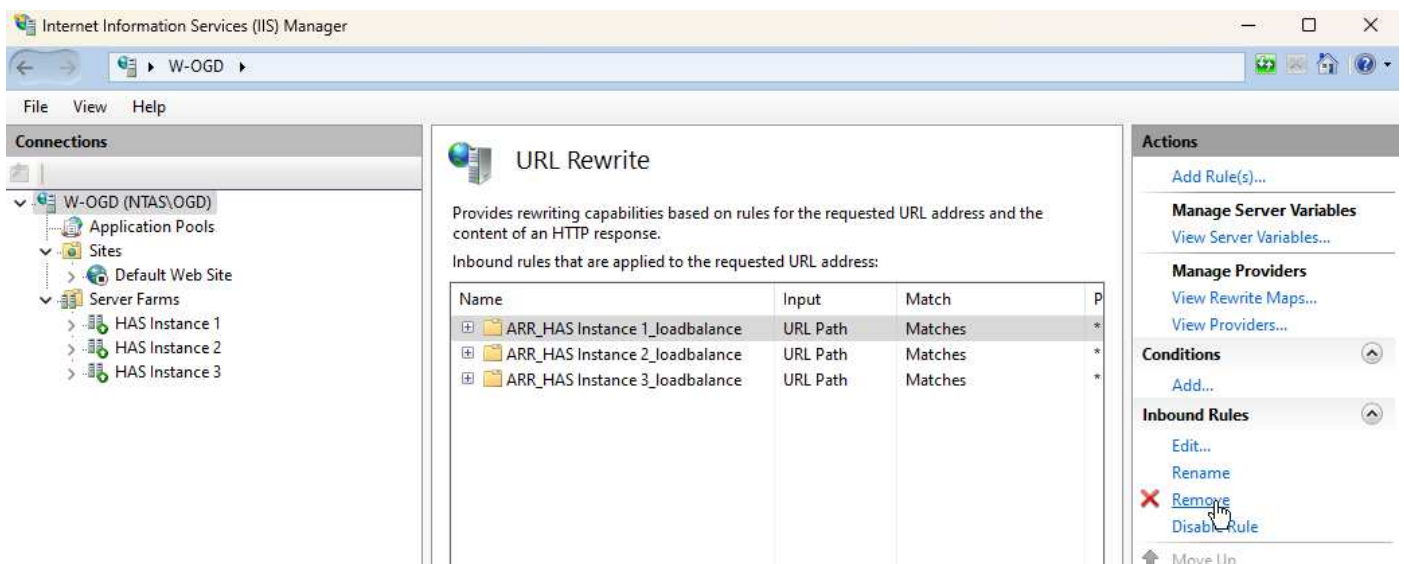
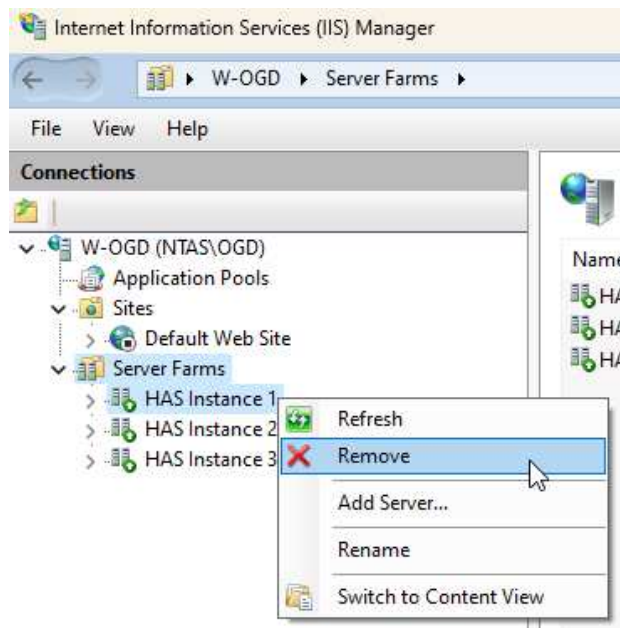
Ensure IIS service is stopped prior to start these steps.

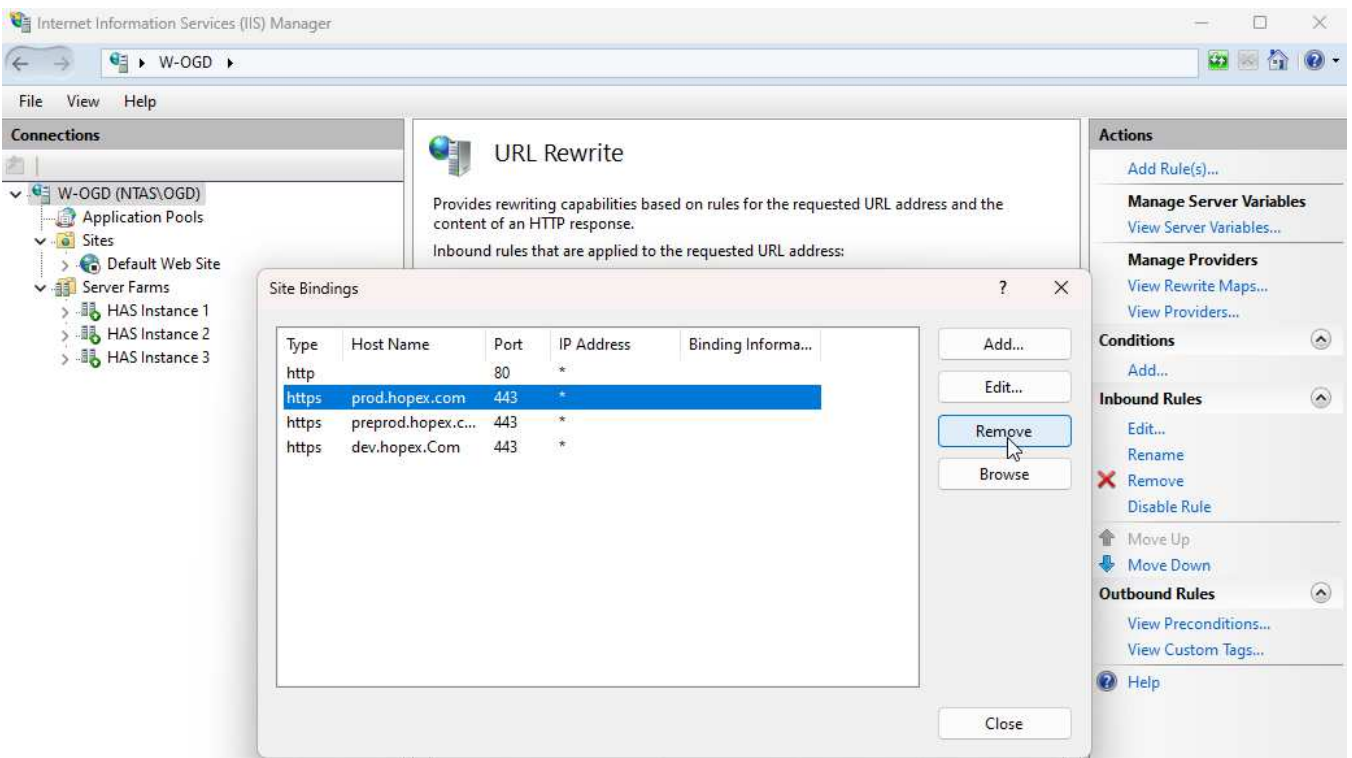


11.1.1. Configuration removal

From IIS Manager remove all configurations that you have performed:

- Remove the server Farms
- Remove any rewrite rules you have created
- Remove any custom binding you have set



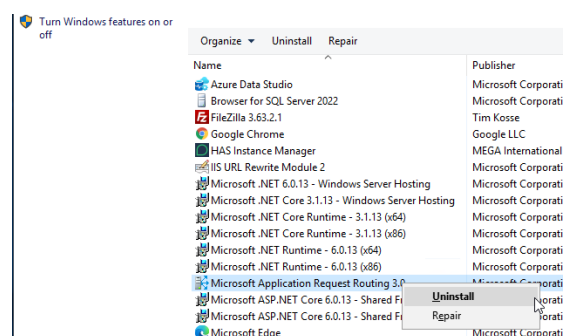
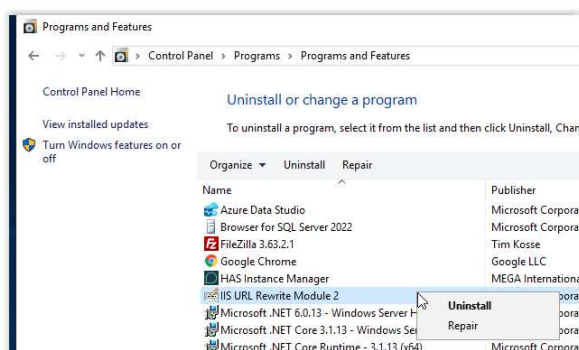


11.1.2. Prerequisite removal (optional)

Should you want to fully reset the prerequisite component installed you can:

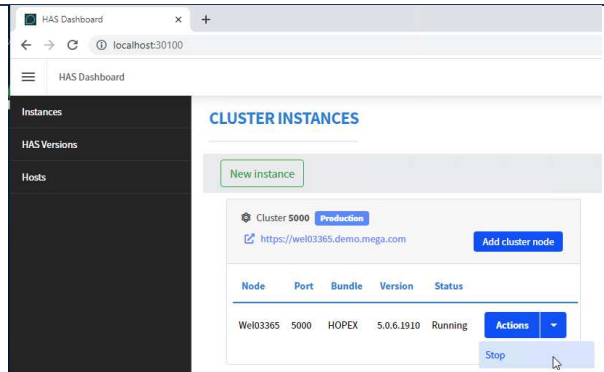
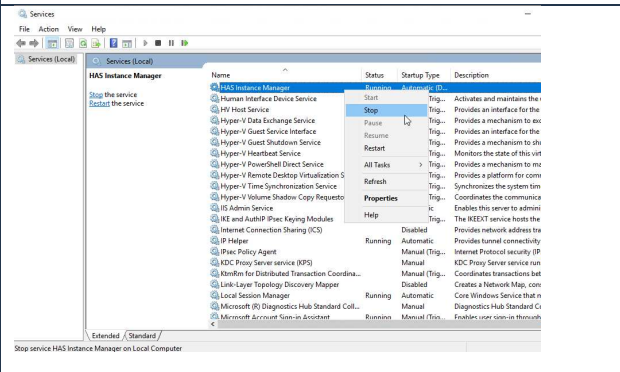
- Uninstall URL rewrite
- Uninstall ARR
- Uninstall IIS

***Note:** IIS, ARR and URL Rewrite might store configuration files that may not be removed when uninstalling.*



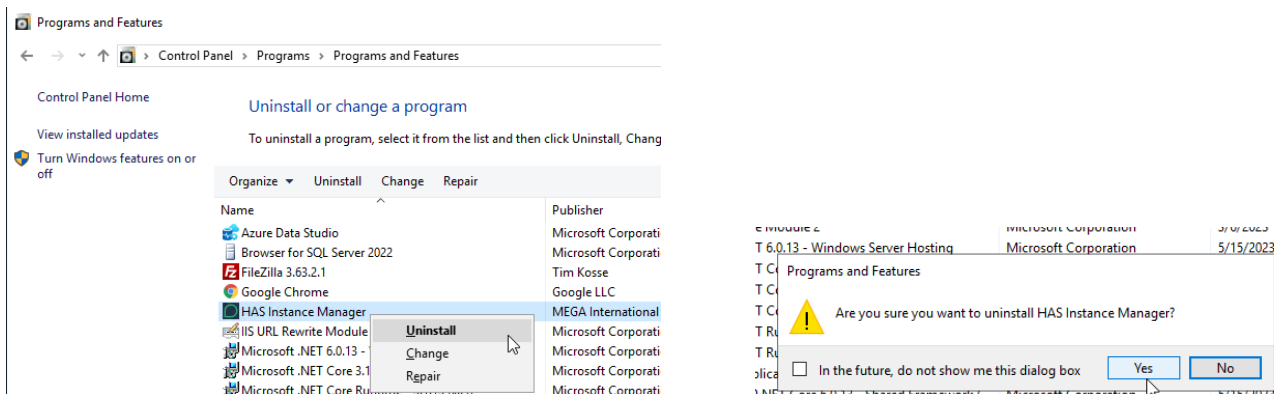
11.2. Removing HOPEX applications

Ensure HAS Instance and HAS Instance Manager are stopped prior to start these steps.

Stop the instance within the HAS instance manager	Stop the HAS Instance manager service within Windows service manager
	

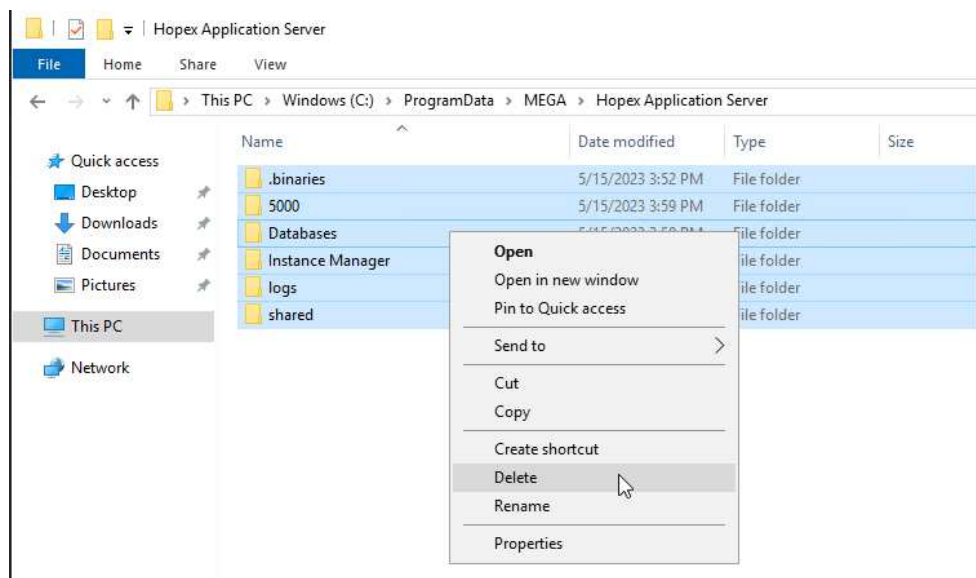
11.2.1. Uninstalling Application

1. From Control Panel >> Programs >> Programs and Features select "Uninstall or change program."
2. Search for HAS Instance Manager and uninstall.
3. When prompted say "Yes". If you did not stop prior the HAS Instance Manager you will be asked to stop it.



11.2.2. Deleting files

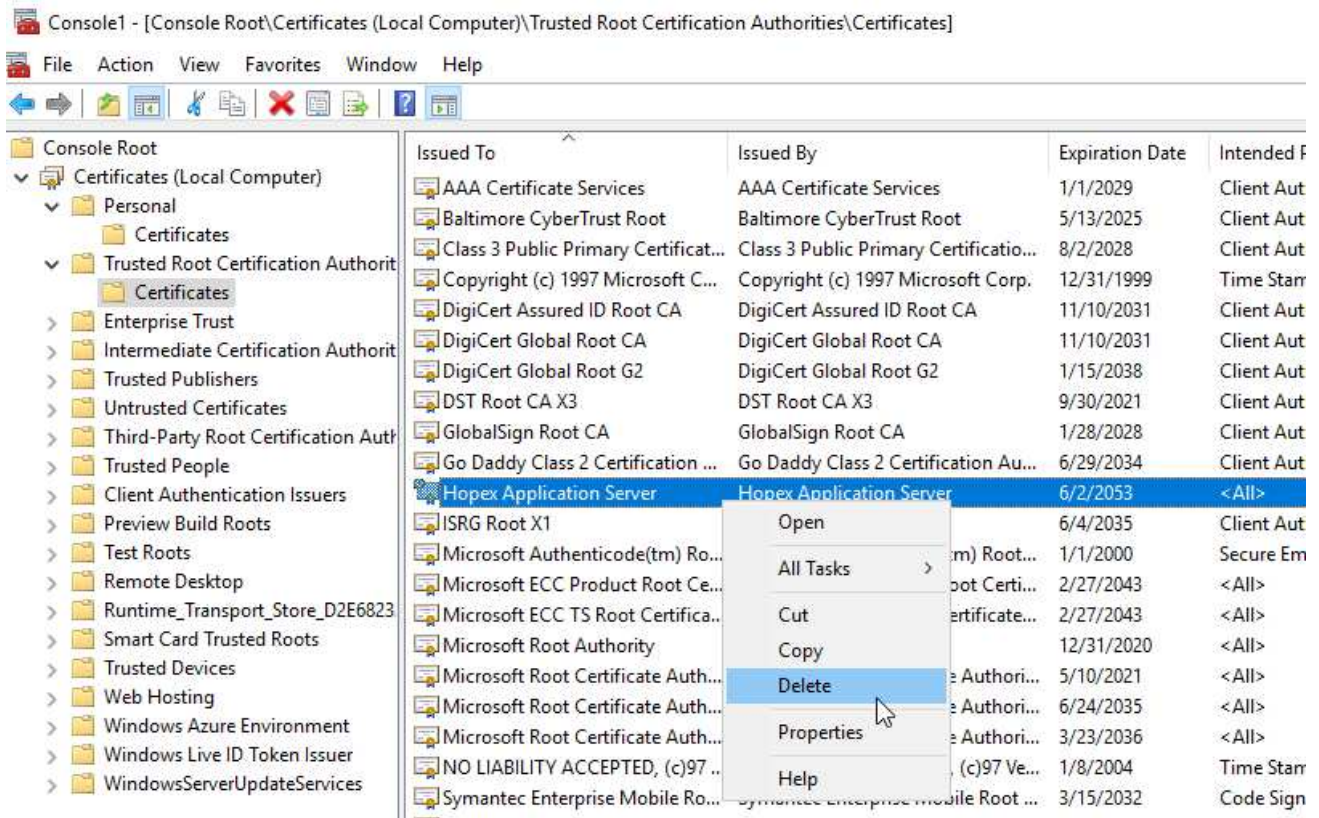
1. Open a Windows file explorer and go to the installation location.
Default: C:\ProgramData\MEGA\Hopex Application Server
2. Select all folders and files and delete them.



*If you did not stop the HAS instance you won't be able to delete all files.
Restart the server and retry.*

11.2.3. Removing SSL Certificate

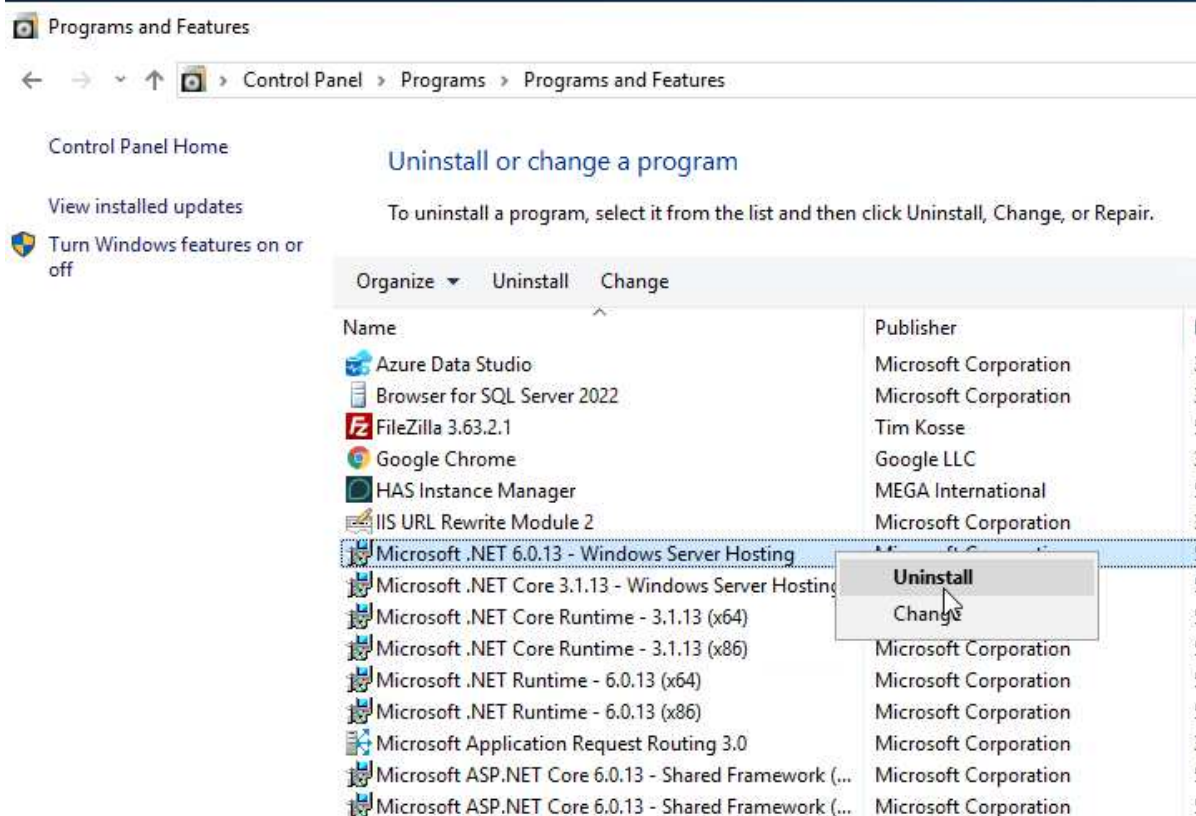
1. Open an MMC console and add Certificates snap-in.
2. In Trusted Root Certification Authorities search for "Hopex Application Server" or custom SSL certificate you may have used.
3. Delete it.



11.2.4. Uninstalling prerequisites (optional)

If not used by any other component, you can also uninstall the prerequisites to clean your server.

1. From Control Panel >> Programs >> Programs and Features select "Uninstall or change program."
2. Delete any Microsoft .net 3.1, 6.0 or 8.0: Windows Server Hosting Bundle, SDK, Core Runtime...



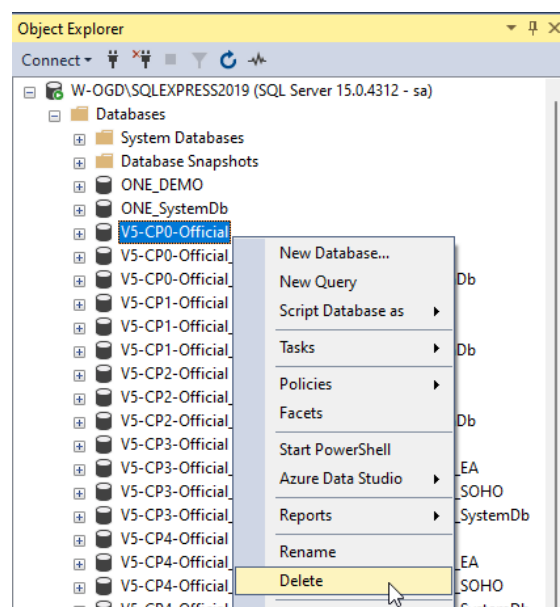
11.3. Removing RDBMS databases

You may want also to delete:

- The HAS Instance database that contains all the configuration
- The Environment SystemDB and Repositories: **only** if you don't want to use HOPEX anymore forever.

From your preferred tool delete the instance database.

Default name: HAS_5000



12. FAQ

12.1.1. How to reset HAS Instance Manager API Key / password ?

The information is stored in the hopex.yml file located by default here: C:\...\HOPEX Application Server\Instance Manager

1. Stop HAS Instance manager.
2. Edit the HOPEX.yml file.
3. Edit the ApiKey section and enter your new password.
4. Restart HAS Instance manager.

12.1.2. What are the default user's login/password?

For HAS Instance the default user is: admin with password Hopex that you need to change at first connection.

12.1.3. Do I need IIS Application pool?

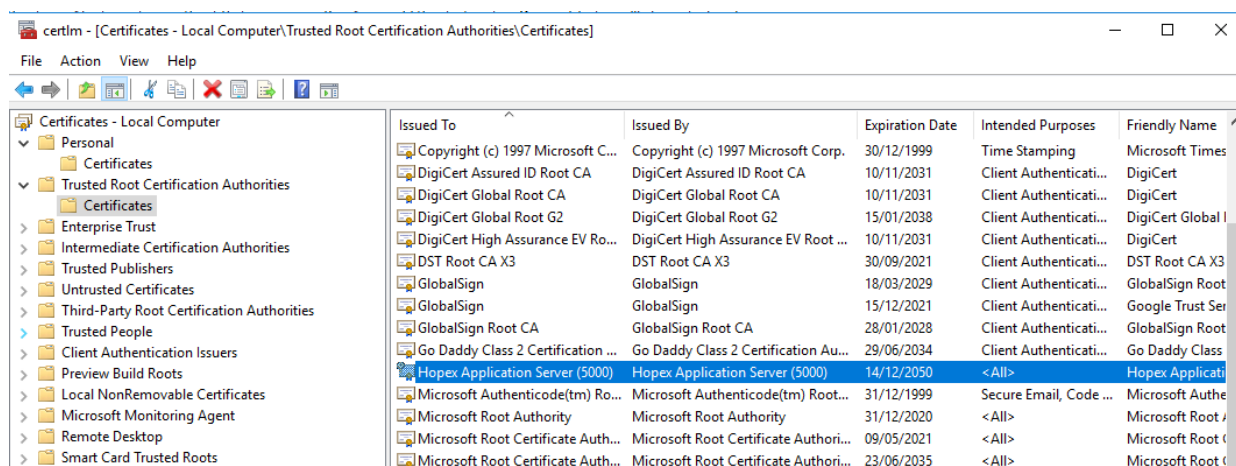
No

12.1.4. Access rights to certificate at installation is no valid.

When you install HAS and HAS modules are not starting. If you see the following message in HAS-Starting log:

[Error] - Failed to create certificate request. It is often due to an access denied to the CA certificate. Keyset does not exist

Go to your certificate and delete "Hopex Application Server (5000)". Restart HAS Server. If the certificate does not appear check domain user access right.



12.1.5. When should I restart HAS Instance or HAS Instance Manager?

HAS Instance manager does not restart the instance.

Each HAS Instance can be restarted by the HAS Instance manager or the HAS Instance itself.

12.1.6. Can I limit the role of a node in a cluster ?

Should you have a cluster with several HAS you may want to limit the usage of a node to server batch.

In that case. For each server, edit the file cluster.cfg to had the tag:

`"!ssp;!back;!front"`

How to Migrate to HOPEX V5

Summary

Check if a more recent version of this document is available in online documentation (MEGA Community).

This document describes the procedures necessary for upgrading HOPEX Data to version HOPEX V5.0 with HAS deployment.

Migration is allowed with specific CP for source and target version.

Source version	Target version (direct migration path)
HOPEX V3.0 CP7	HOPEX V5.0 CP5 last hotfix + update to HOPEX V5.0 last CP last hotfix
HOPEX V4.0 CP7	HOPEX V5.0 last CP last hotfix

For previous versions or releases (HOPEX V1R3, HOPEX V2, HOPEX V2R1) it is necessary to perform an intermediate upgrade to HOPEX V3.0 or HOPEX V4.0.

If you do not know which path to follow, consult the page [HOPEX Upgrade Path Advisor](#) on MEGA Community.

Note that from HOPEX V5.0 deployment is fully different. Architecture, sizing and administration procedures must be reviewed.

This document does not describe:

- Changes regarding classic deployment.
- System requirements and possible architectures (see HOPEX Application Server - Architecture Overview V5.0 EN).
- Change in product list (see your sales representative)
- How to perform installations (see installation documentation).
- How to install update (see how to install CP/hotfix documentation).
- How to manage installations (see online documentation).
- How products are licensed (see Must license installation documentation).
- How to use features (see user manuals).

1. Main steps to migrate data to HOPEX V5.0	4
2. Prepare upgrade of data	5
2.1. Archive main configuration file	5
2.2. Check license with your sales representative.....	5
2.3. Check metamodel, locks, workspaces and workflows	5
2.4. Identify environment to be managed	6
2.5. Identify profiles used.....	6
2.6. Identify Solution packs used.....	6
2.7. Identify existing customizations	7
2.8. Build customization module	7
2.9. Decide 'Definition of path of MetaAssociation'	8
2.10. Review use of the profile 'Enterprise Architect'	8
2.11. Choose authentication mode.....	8
2.12. Decide to keep user web settings	9
2.13. Backup data	9
3. Upgrade data to HOPEX V5.0	10
3.1. Check that migration module is installed	10
3.2. Check that customizations are deployed	10
3.3. Import modules related to solutions packs	11
3.4. Check that Hopex.Core is stopped.....	12
3.5. Upgrade environment (SQL Server storage)	13
3.6. Update stored procedures with SQL Server storage.....	16
4. Complete upgrade of data.....	17
4.1. Set a value for 'Definition of path of MetaAssociation'	17
4.2. Review command line parameters	17
4.3. Restore user web settings for an instance	17
4.4. Backup data	18
5. Check upgraded data	19
5.1. Check conversion log	19
5.2. First control of migration	19
5.3. Check data modelling consistency.....	19
5.4. Other checking indications.....	20
6. Appendix.....	23
6.1. Conversion details.....	23
6.2. Utilities	27
7. FAQs	31

1. Main steps to migrate data to HOPEX V5.0

The data migration consists of several main steps:

1. Prepare data for migration

This step requires HOPEX V4.0 or HOPEX V3.0 (source version allowed for direct migration).

This step performs a validation that the existing data is compliant with the future metamodel and that customizations associated MetaAssociation behaviors are saved.

It also checks for pre-requisites, identifies solution packs used, and helps to determine the value of important parameters (options).

Most of this work requires human intelligence and knowledge of data that has been modelled within the tool. As a consequence, it cannot be automated and should be scheduled in advance of a production migration.

2. Upgrade data

This step requires HOPEX V5.0.

The process upgrades the metamodel and converts data to the format required by the HOPEX platform. This is carried out via conversion tools that need to be run manually from the Administration Console (administration.exe). The procedures vary according to the source version your existing data.

In addition, this allows important parameters to be reviewed (options).

3. Check upgraded data and customizations

This step requires HOPEX V5.0.

This step involves validation from the end user perspective since they are most familiar with the prior state of the data.

- Modelled data has been correctly migrated.
- Customizations have been correctly migrated.

This step also requires human intelligence and knowledge of modelled data. Therefore, it cannot be automated.

2. Prepare upgrade of data

2.1. Archive main configuration file

In addition to data, it is useful to archive the main configuration file (megasite.ini) on the HOPEX installation as a file.

For HOPEX V4.0 or HOPEX V3.0:

Deployment	Location
Mono server installation	<installation path\Cfg By default for HOPEX V4.0: C:\Program Files (x86)\MEGA\HOPEX V4\Cfg
Cluster installation	<clusterrootpath>\ClusterRoot\Cfg Ex: \\mega\data\ClusterRoot\Cfg\megasite.ini

2.2. Check license with your sales representative

The list of products/solutions changes with each version:

- Certain products/solutions are removed (not available).
- Certain products/solutions are deprecated (available and supported as is).
- Certain products/solutions are repackaged (features still available through another product/ solution)
- SQL Server storage is now required.

This document will not describe the product lists or the changes between versions. Please contact your sales representative to see if a new license needs to be programmed.

2.3. Check metamodel, locks, workspaces and workflows

In the source version, for each environment:

Check	Detail
Check that version of environment is aligned with version of programs	Run HOPEX.exe and check that no message is displayed such as 'The versions of HOPEX and the MetaModel are not aligned (HOPEX=X.XX.XXX.XXXX - MetaModel=Y.YY.YYYY.YYYY)...'
Check that environment compiles without error	Run Windows Administration Console (administration.exe) and compile the environment. If the environment compilation generates a log entry in the HOPEX error log, you should fix such errors before migrating your data
Check that no private workspace (ex-transactions) persists	In Windows Administration Console (administration.exe), check workspaces. If a private workspace persists, dispatch or delete it.
Check that no lock persists	In Windows Administration Console (administratrion.exe), check locks. You need to dispatch or delete related workspace.
Password of the login 'System'	Check that the password of the login 'System' is known or set to empty before migration. This is very important since it will be requested to login with 'System'.

2.4. Identify environment to be managed

In HOPEX Application Server deployment, an installation is named instance.

Each instance is mapped to one mode: Development, Training, Staging (synonym: Test, QA...), Production. One machine can host several HAS instances.

Each HAS Instance is mapped to one HOPEX environment. Using multiple environments is not supported.

This means you need as many HAS instance as couple (HAS environment x Mode).

As this can impact IT and human resources, it can be appropriate to review the number of HOPEX environment to manage. To sum needs, use a table such as follows:

Machine	Instance	Mode	Version
Machine 01	5001	Development	HOPEX V5.0 CP1 HF03
	5002	Staging	HOPEX V5.0 CP1 HF03
Machine 02	5000	Production	HOPEX V5.0

2.5. Identify profiles used

For each HOPEX environment, identify the list profiles used directly or indirectly.

This will help later to understand if you are impacted by version changes.

If you do not know the profiles used, you can use the following query:

```
Select [Profile] Into @PL1 Where [Profile Assignment]
Select [Profile] Into @PL2 Where [Super Profile] in @PL1
Select [Profile] From @PL1 Or @PL2
```

2.6. Identify Solution packs used

Solutions packs are add-ins installing data or templates. There are imported in data repositories using the Administration Console, but they can update the system database. Example: Archimate, NAF ...

For each HOPEX environment, identify the list of solution packs imported:

- In the system database
- In a data repository

This will help later to understand what modules need to be imported.

2.7. Identify existing customizations

To upgrade to HOPEX V5.0, it is required to

- Build a customization module (has.custom) to package customizations.
- Deploy customization module before upgrade of data to HOPEX V5.0.

It is therefore important to identify existing customizations to build a customization module.

Indications

Before HOPEX 5.0 various customization can have been made at environment of installation level.

Nature	Example	Comment
Resources	.PNG files .MGS files .ICO file...	Shape files, Images, Resource for web site generation...
Code	.JAR files .DLL files .VBS files	Java components .NET components VB script components
GraphQL Schema	.JSON file	GraphQL Schema extensions
System database updates	System objects and link	Metamodel extensions Report template Web site templates...

Resources and code persist in specific folders.

For version HOPEX V4.0 or HOPEX V3.0, here is a list of possible folders:

- <installation path>\Customizations\javali
- <customization folder path>\javali
- <installation path>\Customizations\dotnet
- <customization folder path>\dotnet
- <installation path>\Customizations\mega_usr
- <customization folder path>\mega_usr
- <installation path>\DotNet\hopex.graphql\1.0.0.0\CONFIG\V3\Custom

See also KB 00009168.

System database updates persist in database SystemDb or each environment and cannot be identified easily.

2.8. Build customization module

This section requires knowledge HAS Customization procedures.

There should be a HAS instance (development, staging/test) for each HOPEX environment. A HAS instance in 'development' mode is required.

Time to build customization module can vary according to number of customizations.

Main steps	Comment
Initialize customization module	In HAS instance (development), create development context mainly folder structure for customization module
Gather customizations	Capture systemdb and/or data updates. Move external files or components to appropriate folders

Build package of customization module	Generate a .haspkg file with a script
Test customization module	Test installation in HAS instance (staging/test) If necessary, do a loop to tune the customization module in HAS instance (development)

See also <https://store.mega.com/modules/details/has.custom>

2.9. Decide 'Definition of path of MetaAssociation'

This step requires a decision for each HOPEX environment.

In the HOPEX options, group 'Repository', an option 'Definition of path of MetaAssociation' is available at installation and environment level. This option enables to control the way MetaAssociation behaviors are interpreted according to the value chosen:

Value	Recommendation
Standard Mode	Recommended for new projects. Default value.
Compatibility Mode	Recommended for compatibility with behaviors and customizations performed in version MEGA 2009 and lower (data and system database customization). When switching to 'Standard mode', a review that may require time and expertise is necessary.

Note that 'Standard Mode' is the default value. You can change the value and compile the environment without impact on data except namespace. However, the change will affect the behaviors (namespace, navigation, extraction, protection, export, comparison...).

2.10. Review use of the profile 'Enterprise Architect'

For many versions, the profile 'Enterprise Architect' (ex-EA Standard) has been used for multiple purpose

- Use legacy products (MEGA Architecture...)
- Perform customizations
- Use HOPEX Solutions

This profile is designed for use of legacy products.

- It is not designed for customization: use the profile 'HOPEX Customizer'.
- It is not designed for use HOPEX Solutions: use dedicated profiles and desktops.

With HOPEX V5.0, the profile 'Enterprise Architect' has a command line that filters HOPEX Studio and HOPEX Solution:

```
/RW'NAF;ARC;HBPA;UML;MPL;SOIA;TOG;SM72;DMO;ERML;CMDB'
```

If projects need a profile and desktops that combines legacy product and HOPEX solutions or that combines HOPEX Solutions, a specific study is required.

2.11. Choose authentication mode

An authentication framework called UAS (Unified Authentication Service) is available.

Authentication configured with previous versions will run natively in most cases (see section 'Other checking indications' in this document). Anyway, it is recommended to consider the UAS framework capabilities:

- OpenID authentication (out of the box, configuration required).
- SAML2 authentication (out of the box, configuration required).
- Windows authentication (out of the box, configuration required).

For more details, see online documentation 'Installation and Deployment : HOPEX Unified Authentication Service'.

2.12. Decide to keep user web settings

Web settings are user related settings. They contain information that can be considered as useful, ex:

- List of tiles selected by user in web desktop
- List of dashboards (widgets) selected by user in web desktop

Web settings persist in different folders.

If you need to restore this information when migrating to HOPEX V4, archive (file copy) the file MegaSettings-*.ini on the server hosting the source installation (ex: HOPEX V4.0).

With HOPEX V3.0, such files are saved in the folder:

%ProgramData%\MEGA\HOPEX V3\ClusterRoot\UserSettings

With HOPEX V4.0, such files are saved in the folder:

%ProgramData%\MEGA\HOPEX V4\ClusterRoot\UserSettings

2.13. Backup data

Check with the system administrator that all HOPEX environment have been backed up. This means for each environment.

- A .BAK file for the system database (SystemDb)
- A .BAK file for each data repository

Check also that all customizations have been backed up (physical copy).

3. Upgrade data to HOPEX V5.0

Data upgrade is made using Windows Administration Console (Administration.exe). Check that Administration.exe can run.

For each HOPEX environment, several steps are required:

- Perform technical conversion of the system database for SQL Server.
- Upgrade of **both the system database and data repositories** using an environment update wizard. It is no longer required to convert explicitly each data repository. Of course, if a data repository is referenced after environment upgrade, the environment update wizard needs to be run again so that it is converted.

Note that environment upgrade consists in running:

- **Technical conversions.** They update SQL tables and indexes to the expected format. They apply for each data repository and for the system database.
- **System database upgrade.** It upgrades the metamodel and templates stored in the system database to the format expected for the target version.
- **Functional conversions.** They update the system objects stored in system database and the data objects stored in the data repositories to the expected format.

3.1. Check that migration module is installed

From HOPEX V5.0 CP3, a specific module **HOPEX Environment Migration Package V5** (hopex.core.migrate) needs to be installed to migrate environments from previous version (HOPEX V4.0 and lower). If this module is not installed a warning will be displayed when running the menu Automatic environment update.

3.2. Check that customizations are deployed

Customizations must be deployed **BEFORE** upgrade of data.

There are two situations

Situation	Recommendation
Upgrade of data is run from a HAS instance in 'development' mode when customization module was developed	Customizations are already deployed. Check that they are available.
Upgrade of data is run from another HAS instance in 'staging' (test) or 'production' mode	Deploy customization module build previously in this HAS instance. Check that they are available.

Deploy customization module build previously in a HAS instance

In the HAS instance, for customization module, install the corresponding module (Module List, tab 'Update', button 'Upload from file'). Then run Environment Automatic Update in Administration.exe and restart HAS instance to check consistency in module dependencies.

For more details see online documentation <https://doc.mega.com/hopex-v5-en>
Section HOPEX Administration > Administrator Guide > Managing objects > Importing a Module in HOPEX.

Check that customizations are available

In both situations, customizations must be present in the HAS instance where environment update in performend.

C:\ProgramData\MEGA\Hopex Application Server\<instance
port>\.shadowFiles\has.custom\<module version>.

3.3. Import modules related to solutions packs

If you did not use solution packs, skip this section.

Solutions packs (identified before migration) are replaced with modules available on HOPEX Store (<https://store.mega.com/>).

Here is a mapping table for mostly used solution packs.

Solution Pack	Module
Archimate V3	Archimate V3.1 (1)
HOPEX360	HOPEX360
NAF	NAF Framework
Privacy Management	Privacy Management Content
SGBD SQL Type - DB2 OS 390 Version 10	Database Design DB2 OS 390 V10
SGBD SQL Type - DB2 OS 390 Version 11	Database Design DB2 OS 390 V11
SGBD SQL Type - DB2 UDB Version 10.5	Database Design Postgres SQL 9.3
SGBD SQL Type - DB2 UDB Version 10.5	Database Design DB2 UDB V10.5
SGBD SQL Type - DB2 UDB Version 9	Database Design DB2 UDB V9
SGBD SQL Type - MySQL Version 4.1	Database Design MYSQL V4.1
SGBD SQL Type - MySQL Version 5	Database Design MYSQL V5
SGBD SQL Type - Oracle 11	Database Design Oracle 11
SGBD SQL Type - SQL Ansi ISO 9075.1992	Database Design SQL Ansi ISO 9075 1992
SGBD SQL Type - SQL Server 2008	Database Design SQL Server 2008
SGBD SQL Type - TeraData Version 14	Database Design TeraData V14

In the HAS instance, for each Solution Pack used previously, install the corresponding module ('Module List, tab 'Add new'). Then run Environment Automatic Update in Administration.exe and restart HAS instance to check consistency in module dependencies.

(1) From HOPEX V5.0, Archimate V3.1 is mandatory.

3.4. Check that Hopex.Core is stopped

Unlike previous versions, Administration.exe cannot run if all processes and services are stopped.

To enable environment upgrade, it is required that:

- HAS Instance manager is started.
- An HAS instance is created (with licence configured) and started.
- Module Hopex.Core si stopped.

Procedure to stop module HOPEX Core Back-end V5.0 (hopex.core):

- Select HAS instance, ex <https://mymachine:5000>.
- Open HAS Console and login.
- In HAS console, display tab **Cluster**.
- For module HOPEX Core Back-end V5.0 (hopex.core), select action Stop on the right.
- Wait until module is **Stopped**.

3.5. Upgrade environment (SQL Server storage)

In the procedure, various warning messages will be displayed. Most of them will be ignored. If a message is displayed that is not quoted in the procedure, see the FAQs section of this document.

Note that only data repositories already referenced when the environment is upgraded will be migrated.

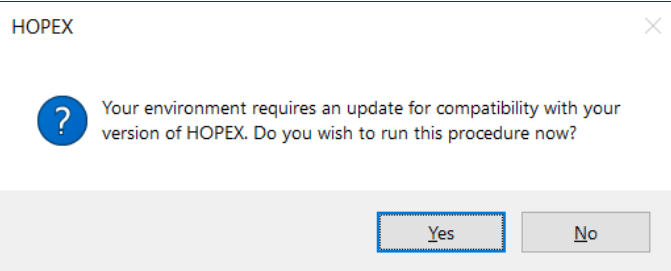
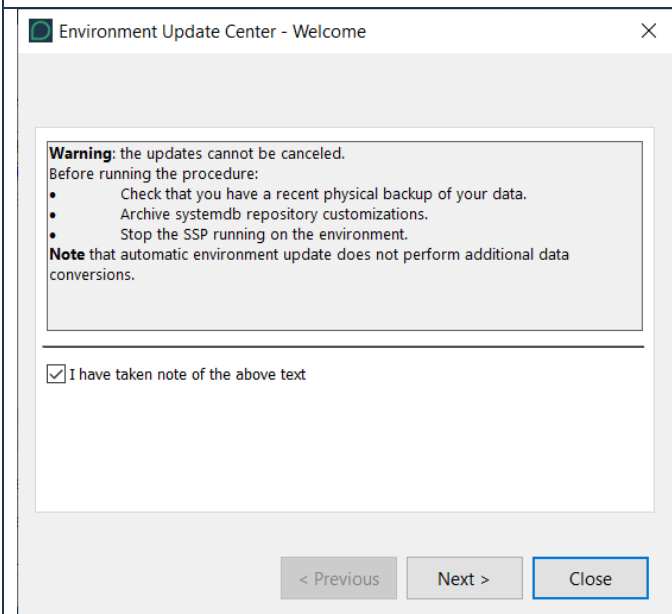
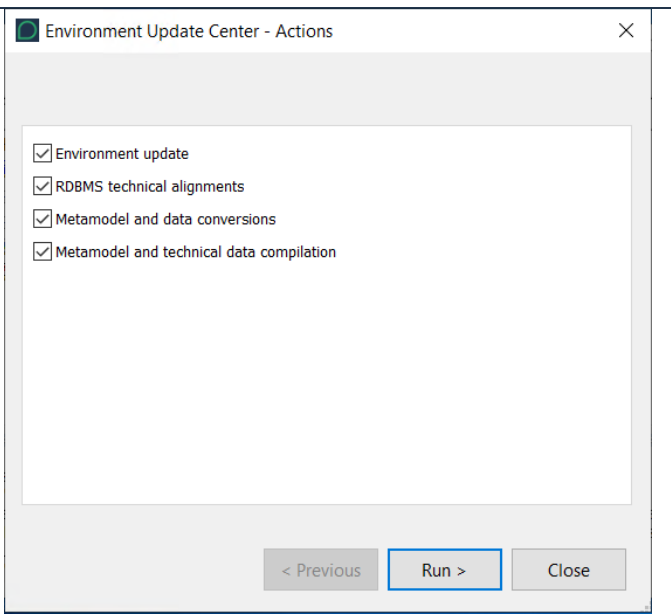
With HAS deployment, Administration.exe is installed in the folder of the HAS instance:

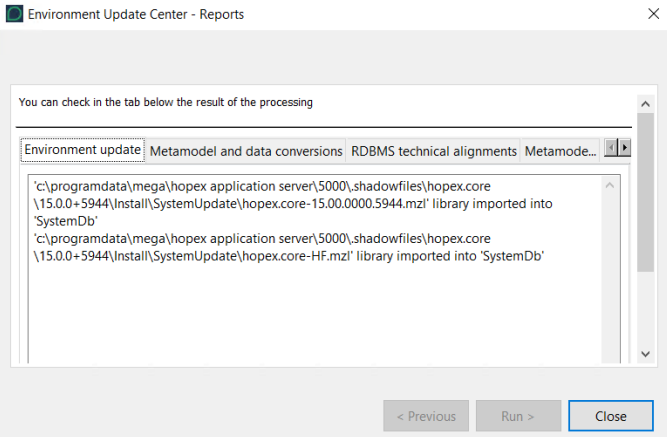
%programdata%\MEGA\Hopex Application Server\<instance port number>\.shadowFiles\hopex.core\<build number of module HOPEX core>

Example:

C:\ProgramData\MEGA\Hopex Application Server\5000\.shadowFiles\hopex.core\15.0.0+XXX

Procedure in version HOPEX V5.0:

Step 1	Step 2
<ul style="list-style-type: none"> Start the Windows Administration Console (administration.exe) Click menu Help > about HOPEX Check that version is HOPEX V5.0 (15.0.X.XXXX) Create a reference for the environment to be converted 	<ul style="list-style-type: none"> Select and open the environment to be upgraded with the login System. Click Yes to the question displayed (Do you wish to run this procedure now?)
	
Step 3	Step 4
<ul style="list-style-type: none"> A wizard Environment updating center - Welcome is displayed Read the text, check the option I have taken note of the above text and click Next 	<ul style="list-style-type: none"> A list of actions is displayed. Keep them checked
	

<p>Step 5</p> <ul style="list-style-type: none"> Click Run to start the update. Duration can vary according to various parameters (source and target versions, infrastructure performances, size, and number of repositories). It usually takes a few hours. 	<p>Step 6</p> <ul style="list-style-type: none"> A list of reports is displayed (one tab for each action) Review reports and click Close to exit the wizard.
	
<p>Step 7</p> <ul style="list-style-type: none"> A warning can be displayed: The indexing format changed. Re-index your repositories to be able to use the full-text search. Click OK to hide it. 	<p>Step 8</p> <ul style="list-style-type: none"> A message should be displayed: Your environment has been successfully updated. Click OK to hide it. Close the environment. Exit the Administration Console.

Write down the date and time where environment was upgraded.
This can help focus on this time later when reading the conversion log.

3.6. Update stored procedures with SQL Server storage

This step is mandatory for each data repository or system database. The code of existing stored procedures (created in a previous version) needs to be initialized with the HOPEX V5.0.

Pre-requisite:

- SQL Server Service account for HOPEX has permissions to delete and create stored procedures

Procedure:

1. Start Administration.exe.
2. Select and open the environment with the login **System**.
3. For each data repository:
 - a. Select the data repository.
 - b. R click RDBMS Administration > **Remove private workspace temporary data**.
 - c. Click **Clean Up** and wait until the conversion is over.
 - d. R click RDBMS Administration > **Shrink unused repository historical data**.
 - e. Click **Consolidate** and wait until the conversion is over.
4. Close the environment.
5. Exit Administration.exe.

Duration can vary according to various parameters (source and target versions, infrastructure performances, size, and number of repositories).

Note that it is important that the execution of stored procedures is scheduled (batched) via a maintenance plan. Refer to the administration documentation.

4. Complete upgrade of data

4.1. Set a value for 'Definition of path of MetaAssociation'

Once a decision has been made (see section Decide 'Definition of path of MetaAssociation' sooner in the document), it must be implemented.

For each HOPEX environment:

1. Start the Windows Administration Console (administration.exe).
2. Select and open the environment with the appropriate login (ex: system).
3. Select the environment
4. R click > **Options > Modify**
A list of options is displayed.
 - In the left tree, select the folder **Repository > Metamodel**
 - In the right pane, select a value for **Definition of path of MetaAssociation** according to the decision made.
5. Exit Administration Console

4.2. Review command line parameters

A property 'Command Line' is available at two levels:

- In properties of profile objects
- In properties of login objects (login objects are created when converting user objects)

If a string is set and contains codes that are not available for HOPEX V5.0 (ex: code 'PRO'), it will not be considered. No error should be displayed to screen but in the error logfile. It is therefore recommended to review command line parameters and remove codes that are not available for the version.

Before removal	After removal
/RW'PRO,DMO'	/RW'DMO'

To identify the objects to be updated, you can run the following queries:

Object Type	Example of query for the code 'PRO'
Login	Select [Login] Where [Command Line] Like '#PRO#'
Profile	Select [Profile] Where [Command Line] Like '#PRO#'

You can get a list of codes not available for the version in MEGA Community, KB 00004513.

4.3. Restore user web settings for an instance

If you need to restore this information when migrating to HOPEX V5.0, restore (file copy) the files MegaSettings-*.ini on the server hosting the target installation (HOPEX V5.0). This will enable that the information is imported to the database of the instance.

With HOPEX V5.0, such files are expected in the folder:

%ProgramData\MEGA\Hopex Application Server\<instance>\LocalData\UserSettings
Ex: C:\ProgramData\MEGA\Hopex Application Server\5011\LocalData\UserSettings

If target installation is a cluster installation, the files MegaSettings-*.ini must be duplicated on each node of the cluster.

Note that this is not a batch tool. If an end user does not login to HOPEX V5.0, related user setting is not imported to the database of the instance.

4.4. Backup data

Check with the system administrator that all HOPEX environment have been backed up. This means for each environment.

- A .BAK file for the system database (SystemDb)
- A .BAK file for each data repository
- A .BAK file for configuration database

In case of a further error requesting to restore data, this will be a stable point of restore.

5. Check upgraded data

It is highly recommended to back up each environment once it has been upgraded.

The standard installation and upgrading process takes care of all the conversions that can be automated. Technically speaking, conversion success is guaranteed by:

1. The correct execution of the environment automatic upgrade processing.
If errors are met at this step, the migration process must be stopped so that a diagnosis is made. Carefully check the Mega error log.
2. The correct execution of all mandatory conversions for the system database.
If errors are met at this step, the migration process must be stopped so that a diagnosis is made.
3. The correct execution of all mandatory conversions for each data repository.
If errors are met at this step, the migration process must be stopped so that a diagnosis is made.

After complete execution of the migration process, it is highly recommended to check data and customizations through:

- First control of migration: run a quick tour to check that data looks correct.
- Check of data consistency: run utilities to enforce rules regarding data structure.
- Other checking indications.

5.1. Check conversion log

When environment is upgraded and conversions are run, error can occur.

A log megaerrYYYYMMDD.txt is generated in %ProgramData%\MEGA\Logs.

Read the log for the date/time of environment upgrade to detect possible errors.

5.2. First control of migration

It is highly recommended to run a quick tour and check that upgraded data looks correct. Of course, this kind of check cannot be exhaustive, but it usually enables to have a first feedback and quickly identify certain migration issues.

Example of scenario:

1. Open a private workspace (ex-transaction).
2. Browse through objects using query tools, navigation trees and diagrams.
3. Perform insignificant updates (ex: change a character in a comment value, slightly move an object in a diagram...).
4. Dispatch private workspace.

5.3. Check data modelling consistency

In previous versions, many things were tolerated, although not recommended. In order to ensure better consistency, there is a need for a thorough review of the repository content and, potentially, some cleaning and tidying tasks to perform. This should be considered as a separate project.

5.4. Other checking indications

If extensions were made to the metamodel, they must be reviewed regarding the structuring rules described above.

If customizations have been made (property pages layer, diagram configuration layer, templates, programs based on script APIs...), a specific check is required based on initial customization specifications. As customizations are often based upon standard layers, they may not be ready to use, and they may have a different look and feel. This check requires functional and platform development skills.

The below list is not exhaustive.

Topic	Comment
Archimate	From HOPEX V5.0, Archimate V3.1 is mandatory. A module 'Archimate V3.1' must be installed and data need to be converted.
Compilation of environment	It is essential for consistency of data and performances that all layers (metamodel, technical data and permissions) are compiled. If you have a doubt about compilation (warning, slow performance) recompile the three layers (metamodel, technical data and permissions) together.
Custom API script code (1)	It is now recommended to use web services (REST API) API script are fully supported in HOPEX V5.0. If several HAS instances exist on a machine, only one can run components using Administration API script at a given moment. Before each execution of components using Administration API script, it is required to reference Mega.Application This is done using a powershell script (HOPEX-regserver.ps1) installed at the root folder of the HAS Instance. Besides it is recommended to review the customized macros and applications using API script, in particular for Administration APIs. Review should be based on initial functional specifications.
Custom authentication (1)	It is required to review authentication in case of fully customized authentication provider. Review should be based on initial functional specifications.
Custom questionnaire templates converted to Standard Mode (questionnaire builder) (1)	Custom questionnaire templates are automatically converted to new format It is necessary to check if converted templates are fully compatible. A specific report enables to understand this. If ever specifications of custom questionnaire templates cannot be fully converted automatically, a change of customization will be required on project resources. See document ' How to Migrate to Questionnaire Builder ' for more details.
Display of report in property pages, tiles, widgets	To prepare a future compatibility with a Content Security Policy (CSP), it is highly recommended to review MetaPropertyPage/Tile/Widget objects displaying reports. Load is reduced for a developer. A document 'Updating Virtual reports HOPEX V5' is available in the online documentation
Edition of Report Templates	It is no longer possible to run Report in Windows Front-End. Use Web Front-End and profile HOPEX Customizer Publisher instead.
GraphQL	Deployment of GraphQL is different

Topic	Comment
	<p>Core GraphQL modules are installed by default with bundle HOPEX. GraphiQL is an optional module named HOPEX GraphQL IDE. Authentication mode is different. An API key is required instead of bearer token.</p> <p>Calls to GraphQL queries are different in HOPEX V5.0. It is required to review calls in third party applications.</p>
HTTP deployment	<p>Each new deployment should be made in HTTP/SSL mode (communication between HTML browser and HOPEX Front-end). This is a standard security practice.</p> <p>MEGA is not committed to investigate all errors met with HTTP mode.</p> <p>If no SSL certificate is available when installing, installation can be made temporarily in HTTP mode. It must be configured to HTTPS/SSL mode before switch to production.</p>
MetaAttribute format (1)	<p>With recent versions, a control checks that Physical Format (set on SQL Server column) matches Meta Format (set on MetaAttribute). When a mismatch is detected, an error is usually displayed such as Inconsistent format for MetaAttribute "EA4430554424043A" (304630847021378116). Physical Format (X). Meta Format (L).</p> <p>Previously, code was tolerant to mismatch.</p> <p>See KB 00009355 in MEGA Community for more details</p>
Profiles management (1)	<p>It is recommended to review the profile execution for custom profiles. Review should be based on initial functional specifications.</p> <p>Certain Profiles have been removed in HOPEX V5.0.</p>
Public/Private workspace	<p>From HOPEX V5.0, all web desktops are configured with public workspaces except the one used by profile HOPEX Customizer (required for customizations).</p> <p>Behavior of a desktop varies with its configuration</p> <ul style="list-style-type: none"> Public workspace: updates are made public automatically so that users share the same vision. Private workspace: end user has its private vision and can decide to refresh, discard or dispatch it.
Report Templates (1)	<p>Certain standard report templates (HTML) are removed from standard: they are no longer maintained by MEGA.</p> <p>Situation varies with the history of the environment.</p> <p>See KB 00008963 in MEGA Community for more details.</p>
Searchable Metaclass	<p>List of MetaClass available with tool Search by Object Type can be different as filtering using 'Technical level' (option 'Metamodel access') setting is no longer considered. Tuning of profiles can be required using permission CRUDS (searchable). See online documentation: HOPEX Administration (Web) > Managing objects > Managing UI Access (Permissions) > Object UI Access Values.</p>
Technical Metaclass	<p>List of MetaClass available with certain tools can be different as filtering using 'Technical level' (option 'Metamodel access') setting is no longer considered. Tuning of metamodel can be required using property 'Meta Usage' (Business, Technical) on MetaClass.Option 'Display Technical Metamodel' enabled to display systematically MetaClass flagged as 'Technical'.</p> <p>See online documentation: Common Features > Querying Objects > Advanced Search > Configuring the Search Tools</p>

Topic	Comment
Web Desktops (1)	It is highly recommended to switch to Universal Desktop V2 configuration <ul style="list-style-type: none"> • When developing new desktops/profiles • When migrating data to HOPEX V4 or higher
Web services	It is required to review web services execution. Review should be based on initial functional specifications.
Information Architecture	If you do not use the Solution 'HOPEX Data Governance' in HOPEX V5.0 (compatibility with 'HOPEX Information Architecture' only), it is necessary to run the utility MEGA Repository - Conversion of Profile 'Data Asset Manager' to 'Data Architect'. Then use profile 'Data Architect' instead of profile 'Data Asset Manager' used in HOPEX V4.0)

(1) If the above indications lead to different changes in customizations (resource and/or code), it is necessary to rebuild a customization package with a new version and deploy it again in the HAS instance.

6. Appendix

6.1. Conversion details

Conversions	Scope	Mandatory if upgrade from HOPEX V3.0 or V4.0 to HOPEX V5.0
Change interaction's color into dark blue on diagrams This tool updates the color of interaction object displayed in diagrams This tool is implemented by a VB script macro ~amuAfX5PXD9L[Change interaction's color into dark blue on diagrams]	Data	Yes KB 00009850
Collaboration - Recompute Workflow Participants This tool recomputes the workflow participants on all running workflows in order to consider Person Groups or missing persons / person groups. This tool is implemented by a VB script macro ~UcqjtaRkYD3O[Collaboration - Recompute Workflow Participants.Method]	Data	Yes KB 00010224
IRM - Compute and Store Assessment KPIs This tool computes and store the following indicators: - Last Assessment Date for Risks and Controls - Aggregated Execution Rate for Controls - Aggregated Pass Control Level for Controls This tool is implemented by a VB script macro ~c9tcUnPrSPCQ[GRC v2 - Compute and Store Assessment KPIs.Method]	Data	No KB 00008632
ITPM - Conversion of Sites towards Data Centers for Installations This tool converts site object to the new format for the solution ITPM This tool is implemented by a VB script macro ~YInR527wW9E0[Conversion of Sites towards Data Centers for Installations.Method]	Data	Yes KB 00009851
MEGA Repository - Communication Protocol to Network Application Protocol (HITA) This tool converts communication protocol objects to the new format This tool is implemented by a VB script macro ~JjQumck4Uv8C[HITA - Convert Communication Protocol to Network Application Protocol]	Data	No KB 00009031
MEGA Repository - Computation of OnDemand and OnUpdate MetaAttribute values _Operator ~4P2FO74eUntJ[MEGA Repository - Computation of OnDemand and OnUpdate MetaAttribute values] Macro ~RO2FOX4eUH(J[MEGA Repository - Conversion of Triggered Attribute.Method]	Data	Yes KB 00009176

This tool is implemented in C++ and cannot be customized.		
MEGA Repository - Conversion of Business Policy names	Data	Yes KB 00010000
MEGA Repository - Conversion of Deprecated MetaAssociation instances to Generic MetaAssociation instances This tool updates the metamodel to enable a generic management of certain MetaAssociations (Note, Document, ...). This tool is implemented in C++ and cannot be customized	Data SystemDb	Yes KB 00006311
MEGA Repository - Conversion of Deprecated MetaAssociationType to Operator This conversion is necessary to recover behaviors associated with deprecated MetaAssociation Types. The conversion is implemented by a VB script macro ~W1X0aNWdMPs2[convert_deprecated_MetaAssociationType_to_Operator]	SystemDb	Yes KB 00006317
MEGA Repository - Conversion of Deprecated Profiles This conversion manages the deprecated profiles so that the assignments are migrated to a compatible profile. For example, assignments that were using Business Information Architect profile will be migrated to Data Architect profile This tool is implemented by a VB script macro ~qsHr)STIWHoQ[MEGA Repository - Conversion of Deprecated Profiles.Method]	SystemDb	Yes KB 00009855
MEGA Repository - Conversion of name properties This tool aligns object names with metamodel definition Conversion may take several dozens of minutes depending on the volume of data This tool is implemented in C++ and cannot be customized.	Data SystemDb	Yes KB 00001289
MEGA Repository - Conversion of permissions from CRUD to CRUDS This conversion add a "S" meaning "Searchable" to all permissions having at least "R". This tool is implemented by a VB script macro ~MCYAqrolWjhJ[convert_CRUD_To_CRUDS]	SystemDb	Yes KB 00009854
MEGA Repository - Conversion of Person into Person (System) This utility creates a new object person (system) for each object person and creates a traceability link between the two objects This conversion is optional and should be decided by the project It can create redundant objects that need reprocessing This tool is implemented by an external script ('Convert_Person_to_MegaPerson.vbs')	Data	Yes KB 00004007

MEGA Repository - Conversion of Privacy Risk names Macro ~gQZT9(eEU1Z7[MEGA Repository - Conversion of Privacy Risk names.Method])	Data	Yes KB 00009177
MEGA Repository - Conversion of Profile Options	System	Yes KB 00009999
MEGA Repository - Conversion of query objects (6.1 and earlier versions)	System	Yes KB 00002003
MEGA Repository - Conversion of removed technical levels This tool sets all technical level value to 'Beginner'. This tool is implemented by a VB script macro ~rjXFayplWHe5[convert_technical_level_beginner]	SystemDb	Yes KB 00009853
MEGA Repository - Conversion of report parameters This conversion sets the value of the new MetaAttribute Values Definition with the value of the deprecated MetaAttribute Kind of proposition. This tool is implemented by a VB script macro ~yCREuDrcSHcA[Conversion of report parameters.Method]	SystemDb	No KB 00008598
MEGA Repository - Conversion of Restrictive MetaAssociation instances to Concrete MetaAssociation instances This tool updates the metamodel to move down restricted MetaAssociation instances storage on their concrete MetaAssociation. This tool is implemented in C++ and cannot be customized.	Data SystemDb	Yes KB 00006309
MEGA Repository - Conversion of workflow subject This tool performs data conversion of Workflow Subjects on all objects of your repository. This mandatory conversion is improving reading performances of HOPEX. This tool is implemented by a C++ macro ~NpqOtNcyT9pI[Workflow Subject conversion] and cannot be customized	Data SystemDb	Yes KB 00008918
MEGA Repository - Convert Person and ARC Responsibility into Person (System) and Assignment Macro ~)(16Zb1cUTwR[Convert Person and ARC Responsibility into Person (System) and Assignment.Method]	Data	Yes KB 00009178
MEGA Repository - Data Conversion - Conversion of Risk Mitigation, GDPR Risk and GDPR Minimization This is a minor conversion which is mandatory for HOPEX Privacy Management users. It is used to take into account the new internal values defined on the risk meta-attribute used by HOPEX Privacy Management in the context of personal data transfers. This tool is implemented by a VB script macro	Data	Yes KB 00009632

~AaeTjhOVWjA3[MEGA Repository - Conversion of Risk Mitigation & GDPR-Risk & GDPR-Minimization]		
MEGA Repository - Deletion of System Job Executions This tool deletes all occurrences of obsolete metaclass System Job Executions in order to reduce the size of the system database. This tool is implemented in C++/Java and cannot be customized.	SystemDb	Yes KB 00009852
MEGA Repository - Legacy conversion of name properties (prior to V5) This conversion updates the name of object or system objects to the format expected in HOPEX V4.x This tool is implemented in C++/Java and cannot be customized.	Data SystemDb	Yes KB 00009849
MEGA Repository - Setting Report and Report value links to template This conversion saves reports parameter values on reports for future use. This tool is implemented by a VB script macro ~r)hhI9R5VrwO[Setting Report and Report value links to template]	Data	Yes KB 00009250
Utility - Convert Questionnaire Templates to New Mode This utility converts Questionnaire Templates to the new format. This conversion is required if you decided to activate new mode (questionnaire builder). Do not run it if you decided to remain in compatibility mode. . See above in this document. This tools in implemented by a macro ~qXI5FWXVUnr1[Utility - Convert Questionnaire Templates to New Mode].	Data SystemDB	Yes KB 00009175

6.2. Utilities

Utility	Scope	Comment
Conversion MEGA Repository - Conversion of Persons authenticated with MEGA This conversion converts logins with Authentication mode 'MEGA' This tools is implemented by a VB script macro ~vvb5R3oFRX2I[ConvertPersonsAuthenticatedWithMEGA.Method]]	SystemDb	Optional KB 00008006
Diagram (drawings) This tool opens, saves and closes all diagrams in the repository. Enables conversion of diagrams with drawings in MGE format. Also enables to check the status all diagrams in a repository. This execution is optional for the system database and data repositories. Conversion may take a significant time depending on the volume of data. This tool is implemented in C++ and cannot be customized.	Data SystemDb	Optional KB 00001270
HITA - Convert Software Technology Fulfillments to Technical Capabilities This tool converts the Business Capability Fulfillment or Functionality that could exist between Software technology objects and Business Capability objects to the new format. This tool is implemented by a macro (~10v92q21QHtG[HITA - Convert Software Technology Fulfillments to Technical Capabilities])	Data	Optional KB 00007770
HOPEX ITPM - Conversion of Standards This tool converts certain objects of the Metaclass 'Standard' to objects of the Metaclass 'Technology'. Selection is made using the query '~5yCf7ugkIr9D[APM - Conversion - Get Standards Linked to Vendors Or Application Deployed]' This tool is implemented by a VB script macro ~2yCfd0hkITND[APM - Conversion of Standards]	Data	Optional KB 00004589
HOPEX ITPM - Convert Application Functionalities to Fulfillment This tool converts Functionality to Application Maps and Functionality to Application system Maps to functionality fulfillment.. This tool is implemented by a macro (~J5XbWR9uQTSD[HOPEX ITPM - Convert Application Functionalities to Fulfillment])	Data	Optional KB 00008909
IRM - Compute and Store Assessment KPIs This tool computes and store the following indicators: - Last Assessment Date for Risks and Controls - Aggregated Execution Rate for Controls - Aggregated Pass Control Level for Controls This tool is implemented by a VB script macro ~c9tcUnPrSPCQ[GRC v2 - Compute and Store Assessment KPIs.Method]	Data	Optional KB 00008632
MEGA Repository - Business Function to Business Functional Area Converts a Business Functions Hierarchy from Process or BPA solution to Business Architecture's Business Functional Area composite structure models.	Data	Optional KB 00007465

Utility	Scope	Comment
Useful to migrate data created with MEGA Process (code PRO) and/or MEGA Process BPMN Edition (code PMN) to the solution Business Architecture (code HBAS) This tool is implemented by a macro (~18VF)i4hNf)I[MEGA Repository - City planning areas to Business Capabilities.Method])		
MEGA Repository - City planning areas to Business Capabilities Convert City Plans to Business Capability Maps and City Plan Areas to Business Capability objects. Useful to migrate data for the solution IT Portfolio Management (Code APM). This tool is implemented by a macro (~18VF)i4hNf)I[MEGA Repository - City planning areas to Business Capabilities.Method])	Data	KB 00007191 Optional
MEGA Repository - Cleanup This tool removes technical temporary data left invalid in repositories after upgrade (ex: recent queries). This tool is implemented by a VB script macro ~W7qD9X3HCT50[MEGA Repository - Cleanup.Method]	Data	Optional KB 00003321
MEGA Repository - Conversion of Deprecated MetaAssociation instances to Generic MetaAssociation instances This tool updates the metamodel to enable a generic management of certain MetaAssociations (Note, Document, ...). This tool is implemented in C++ and cannot be customized	SystemDb	Optional KB 00006311
MEGA Repository - Conversion of EA Projects to PPM projects Converts EA Project (former MetaClass Project renamed to EA Project) to PPM project (new MetaClass Project) and Project scope to Project Deliverables, when applicable Useful with option Product Portfolio Management (code PPM) and a compatible solution (ex IT Portfolio Management...) This tool is implemented by a macro (~6qr9AW25PntP[Mega Repository - Conversion of EA Project.Method])	Data	Optional KB 00007466
MEGA Repository - Conversion of ITPM Applications Exchanges (ARC -> HITA) Converts the description of application exchanges (based on message flows) to the new format used with IT Architecture (code HITA) Useful with solution IT Portfolio Management (Code APM) and new solution IT Architecture (code HITA) This tool is implemented by a macro (~ougT5TtIP1eB[HOPEX ITPM - Conversion of Applications Exchanges (ARC -> HITA)])	Data	Optional KB 00007461
MEGA Repository - Conversion of Notes to Review Notes Creates review notes from notes This tool is implemented by a macro (~sa5nwd0pO5U4[Collaboration - Note Conversion])	Data	Optional KB 00007469
MEGA Repository - Conversion of Organizational Charts This utility converts the nature of Organizational Chart diagrams so that they can be open with MEGA Process BPMN Edition (Code PMN). This tool is implemented by a VB script macro ~YgaCFMJSGPv2[Organisational Chart Conversion]	Data	Optional KB 00003984

Utility	Scope	Comment
MEGA Repository - Conversion of Person into Person (System) This utility creates a new object person (system) for each object person and creates a traceability link between the two objects This conversion is optional and should be decided by the project It can create redundant objects that need reprocessing This tool is implemented by an external script ('Convert_Person_to_MegaPerson.vbs')	Data	Optional KB 00004007
MEGA Repository - Conversion of Profile 'Data Asset Manager' This tools converts assignments of 'Data Asset Manager' to assignment of profile 'Data Architect' This tool is implemented by a VB script macro ~0p93U6n3Z1xH[MEGA Repository - Conversion of Profile 'Data Asset Manager' to 'Data Architect'.Method]	SystemDb	Optional KB 00010205
MEGA Repository - Conversion of Specific Name of Dictionary Object to Term This conversion updates objects based on terms to the new format in case name has been customized This tool is implemented by a VB script macro (~ltqQKs6TQLoG[Mega Repository - Conversion of Specific Name of Dictionary Object to Term.Implementation])	Data	Optional KB 00007723
MEGA Repository - Conversion of widgets Converts dashboard widgets to a new format (independent from container of web desktop) To keep widgets used in previous versions, a prerequisite to this conversion is to restore web settings. This tool is implemented in a VB script macro ~DcdsKyj4QDAE[WidgetConversion.Method]	SystemDb	Optional KB 00007569
MEGA Repository - Convert participants of projects This tools converts participants of projects to the new format This tool is implemented by a VB script macro ~MKy3t2XCnf7U[Convert participants of projects.Method]	Data	Optional KB 00006308
MEGA Repository - Convert Report templates (MS Word) to RTF Format This tool converts Report templates (MS Word) from Word to RTF format. This is required to generate documents with HOPEX Web Front-end. This tool is implemented in C++ and cannot be customized. Note that MS Word is required on the machine running the conversion	SystemDb	Optional Custom templates should already be in RTF format. KB 00003499
Mega Repository – Convert Web EA Project This tool converts requirements of EA projects to new format This tool is implemented by a VB script macro ~(Tyap4AVOn3G[Mega Repository – Convert Web EA Project.Method]	Data	Optional KB 00008633
MEGA Repository - Creation of links instances from MEGA fields This tool creates impact analysis links for objects referenced by object references (MEGA fields) in texts properties. Conversion may take a significant time depending on the volume of data. This tool is implemented in C++ and cannot be customized.	Data SystemDb	Optional KB 00002005

Utility	Scope	Comment
MEGA Repository - Objectives -> Enterprise Objective Conversion Creates Enterprise Objective from Objectives Useful to migrate data from Business Strategy (code MBS) to Business Architecture (Code HBAS) This tool is implemented by a macro (~ueHLXNrMP1sV[Objectives -> Enterprise Objective Conversion.Method])	Data	Optional KB 00007463
MEGA Repository - Report template deletion rollback utility This conversion restores on reports the data required to run these reports in case the related report template is removed then restored again This tool is implemented by a VB script macro ~ed)vUZk5VXNL[Report template deletion rollback utility]	Data	Optional KB 00009620
Shapes This tool updates customized shapes to the most recent format. Shapes located in the folder 'Mega_usr' or both installation and HOPEX environment are upgraded. This conversion is optional for the System repositories. This tool is implemented in C++ and cannot be customized.	SystemDb	Optional KB 00000362
Utility - Save a snapshot of closed questionnaires This conversion generates a snapshot of all closed questionnaires which is used in order to display them and prevent any impact if their associated questionnaire template is modified later in time. This tool is implemented by a VB script macro ~fnkty)TIXnfV[Utility - Save a snapshot of closed questionnaires]	Data	Optional KB 00009856

7. FAQs

7.1.1. I cannot find the option to enable data modification

The option was moved and renamed to 'Authorize HOPEX data modification'

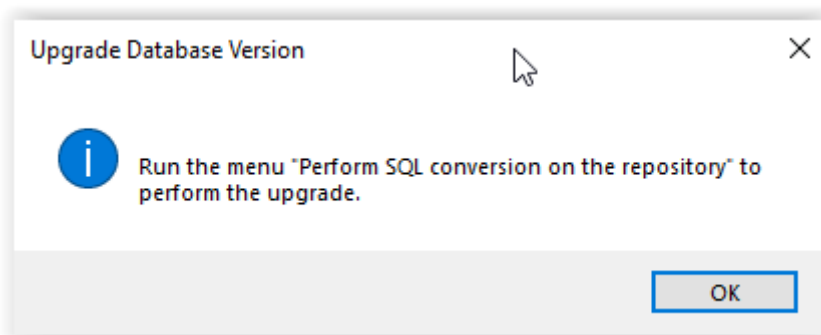
Note that it is not recommended to use this option.

If you need to configure it, go in options, display Extended level, browse group 'Installation > Customization'.

7.1.2. Warning 'Run the menu 'Perform SQL conversion on the repository' to perform the upgrade

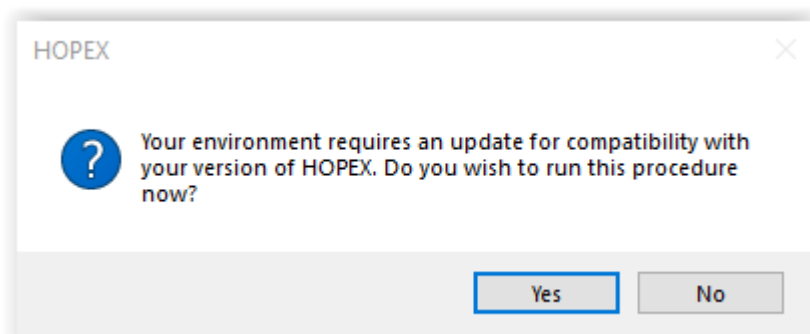
This means that the format of tables in SQL Server must be converted.

You need to run a menu (Perform SQL conversion on the repository) from the Administration Console. See earlier in this document.



7.1.3. Warning 'Your environment requires an update for compatibility with your version of HOPEX...'

This warning report that the system database is not up to date. This occurs if the programs have been updated and the environment has not/has not yet been updated.



7.1.4. Warning 'Writing access diagram is not compiled. The diagram should be recompiled ...'

Certain actions can leave the writing access diagram (ex-User diagram/Authorization diagram) in a state not compiled.

To compile the metamodel of the environment:

1. Start the Windows Administration Console (administration.exe).
2. Select and open the environment to be converted with the login **System**.
3. Select the folder 'User management'

4. R click > Compile writing access diagram
5. Click Start to trigger the compilation
Wait until the processing is complete.
6. Click 'Close'
7. Exit the Windows Administration Console

7.1.5. How to run a specific conversion or utility?

It is now required to use the update wizard instead of triggering explicitly conversions.
It is still possible to run conversions or utilities.

Procedure for conversions:

1. Start the Windows Administration Console (administration.exe).
2. Select and open the environment to be converted with the login **System**.
In the folder 'Repositories', select **SystemDb or a data repository**
 - R click > **Conversions > Convert data into current version** and select **From <source version>**.
 - Check the appropriate conversions.
See the table 'Conversion details', later in this document
 - Click 'OK' to trigger the conversion
Wait until the conversion is complete
 - Close the environment
3. Exit the Windows Administration Console.

Procedure for utilities:

1. Start the Windows Administration Console (administration.exe).
2. Select and open the environment to be converted with the login **System**.
In the folder 'Repositories', select **SystemDb or a data repository**
 - R click > **Utilities**.
 - Check the appropriate conversions.
See the table 'Conversion details', later in this document
 - Click 'OK' to trigger the conversion
Wait until the conversion is complete
 - Close the environment
3. Exit the Windows Administration Console.

How to Install a CP

Summary

Check if a more recent version of this document is available in online documentation (MEGA Community).

This document describes the procedures necessary for installing a CP for HOPEX V5.0 in HAS deployment.

It is assumed here that administrator has live access to HOPEX store (internet access).

Important

Starting from HOPEX V5 CP5 the pre-requisite is version 6.0.10 minimum for .NET Core Hosting Bundle. Check this requirement before upgrading to CP5 or higher CP.

1. FOREWORD	3
1.1. HAS instance	3
1.2. HAS module.....	3
1.3. HAS bundle	3
1.4. Corrective Pack in HAS deployment.....	4
2. UPGRADING A HOPEX BUNDLE	5
2.1. Update of Instance Manager.....	5
2.2. Online procedure (internet access):.....	6
2.3. Offline procedure (no internet access):	9
3. UPGRADING HOPEX DATA.....	13
3.1. Pre-update:	13
3.2. Update Procedure:.....	14
3.3. Additional conversions:	15
3.4. Post-update:.....	17
4. FAQs.....	18

1. FOREWORD

1.1. HAS instance

In HOPEX Application Server deployment, an installation is named **instance**.

Each HAS Instance is mapped to:

- A Port: 5000, 5001, 5002...
- A version of HOPEX
- One mode: Development, Training, Staging (synonym: Test, QA...), Production.
- One HOPEX environment. Using multiple environments is not supported

HAS Instances are managed by a program named Instance Manager.

1.2. HAS module

In HOPEX Application Server deployment, each component is delivered as a **module**.

Each module has its version, its dependencies.

In concrete terms, a module is a .haspkg file.

Module	System module	Short description
HOPEX Core Back-End V5.0	Yes	Core of HOPEX platform. Most important module. Code: hopex.core
HAS Identity Provider	Yes	Component used for authentication. Code: has.uas
Bold BI	No	Component used to design widgets. Code: dashboard.boldbi
HOPEX360	No	Web site Template. Code: hopex360
...		

1.3. HAS bundle

System modules are packaged in a **bundle** named 'HOPEX'.

Non-system modules are available as independent modules.

In concrete terms, a bundle is a folder .haspackages containing a set of .haspkg files.

A bundle packages a specific combination of modules in different version compatible with each other. Example:

Bundle	Module	Version
Bundle 5.0.710 (HOPEX V5.0 - 64 bits)	HAS Console	15.0.0+157
	HAS Identity Provider	15.0.0+157
	HOPEX Questionnaire Builder	15.0.0+5947
	HOPEX Core Back-End V5.0	15.0.0+5947
	HOPEX Web Front-End V5.0	15.0.0+5947
	HOPEX GraphQL	7.87.506+5947
	HOPEX Redis	1.0.2
	HOPEX REST API	7.87.506+5947

1.4. Corrective Pack in HAS deployment

A Corrective Pack (CP) provides a consistent set of fixes within a major version of HOPEX. GUI should be stable. For each version, several CP are scheduled and heavily tested by QA department.

A CP enables to update the system module of an HAS instance. It is installed via a bundle. There are not CP for non-system module.

The CP provided for the bundle are cumulative.

Ex: HOPEX V5.0 CP2 includes fixes provided for HOPEX V5.0 CP1.

Each CP of a bundle is a new version of this bundle. It will update all the system modules included in this bundle. Each elementary component of the related module will be replaced.

Modules and Bundles can be downloaded and installed via administration consoles provided access to HOPEX Store is available online (<https://store.mega.com/>).

Bundles can be downloaded first as offline package to be installed later offline.

Before proceeding, make sure that, for all the HOPEX environments to upgrade:

- Data is backed up (physical backup).
- The password of the login **System** is known.
This is very important since it will be requested to login with the login System.

There are two typical deployment contexts for HOPEX Application Server (HOPEX programs)

- HOPEX programs are deployed on a single server. There is no concern to replicate updated programs.
- HOPEX programs are deployed on multiple servers (**cluster deployment**). There is a concern to replicate updated programs to each server (node) of the cluster.

So far, deployment of bundles (hotfix update, CP updates) in cluster is not automatic. It is required to download and install bundle on each server of the cluster.

2. UPGRADING A HOPEX BUNDLE

This procedure applies to both single server deployment and cluster deployment. It is required to download and install bundle on each server

Pre-conditions:

- Identify the bundle to install (target bundle).
Ex: 5.0.1 +384 (HOPEX V5.0 CP1)
This information is usually provided by MEGA Technical Support.
- Identify the url of the HAS Instance Manager Console
Ex: <http://localhost:30100/>
- Identify the HAS instance to upgrade (target HAS instance)
Ex: preproduction instance <http://svr0101:5001/>
This information is provided by the project.
- Know the credentials for the HAS Console of this instance.
This information is provided by the project.
- Know the credentials for the Instance Manager Console.
This information is provided by the project.
- Check that no user is connected to the HAS instance.

2.1. Update of Instance Manager

Certain CP require an update of the instance manager program.

Condition	Update of Instance Manager	Comment
From HOPEX V5.0 to HOPEX V5.0 CP1	Not needed	
From HOPEX V5.0/HOPEX V5.0 CP1 to HOPEX V5.0 CP2 or higher CP	Needed	ASP.NET Core runtime 6.0 (hosting Bundle) is required. Update is no longer needed once new version of Instance Manager (15.2.0.49 or higher) is installed

Update of instance manage is performed systematically is you run HOPEX installer, for example new installation or offline installation.

To perform a new installation, read document HOPEX Application Server Installation in online documentation for HOPEX V5.0

Note that, if the expected version of .NET core is not installed, the Instance Manager will not restart. **Verify that this pre-requisite fulfilled before running the setup.exe.**

2.2. Online procedure (internet access):

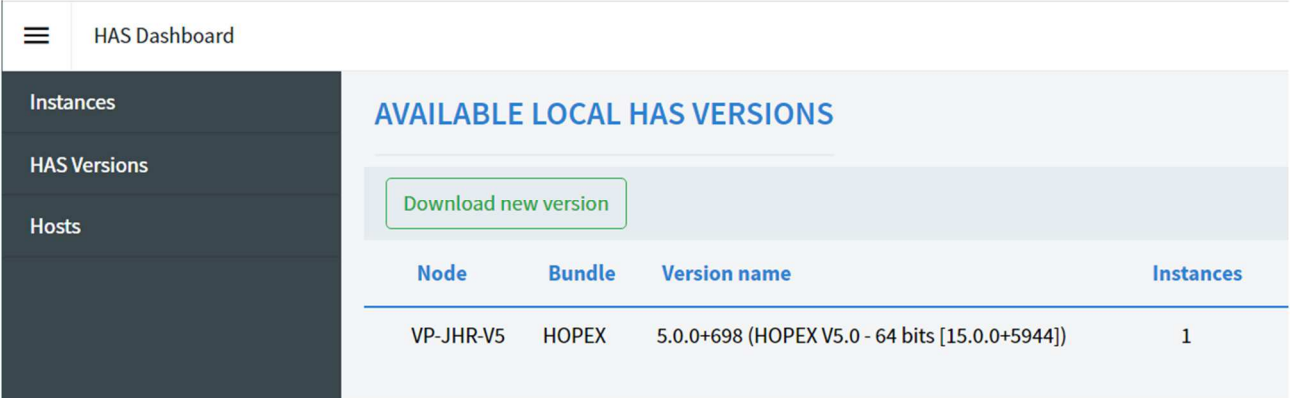
The procedure applies to a HAS instance.

Here, it is assumed that:

- You can access to HOPEX store **<https://store.mega.com>**.
- You have an installation key.

For each HAS instance:

1. Enter the url of the HAS Agent Console
Ex: <http://localhost:30100/>
2. In the left menu, select **HAS Versions**



Node	Bundle	Version name	Instances
VP-JHR-V5	HOPEX	5.0.0+698 (HOPEX V5.0 - 64 bits [15.0.0+5944])	1

3. Click on button **Download new version**.
4. Select carefully the version to install (ex: 5.0.1 +384 (**HOPEX V5.0 CP1**)) in the list and click **Download**.

Download a new version

Machine name

VP-JHR-V5

Select a bundle

HOPEX

Select a version

5.0.1+384 (HOPEX V5.0 CP1)

☐ Show all versions

Download will be processed in the background

Close

Download

- Wait a few minutes up to the end of the download (100% then extraction).
A new folder is created in C:\ProgramData\MEGA\Hopex Application Server\.binaries\HOPEX, ex V5.0.1+384

AVAILABLE LOCAL HAS VERSIONS			
<div>Download new version</div>			
Node	Bundle	Version name	Instances
VP-JHR-V5	HOPEX	5.0.0+793 (HOPEX V5.0 - HF1)	2
VP-JHR-V5	HOPEX	5.0.1+384 (HOPEX V5.0 CP1)	0

- In the left menu, select **Instances**
- Select the target instance and click **Stop** and confirm action
HAS instance stops (status Stopped)

<div><div> Cluster JHR_TrainingV5-5004 Production</div><div> https://vp-jhr-v5:5004</div><div>Add cluster node</div></div>				
Node	Port	Bundle	Version	Status
VP-JHR-V5	5004	HOPEX	5.0.0+793	Stopped <div>Actions</div>

- . Select the target instance and click Actions > **Start**

9. In the page 'Start instance', select carefully the target bundle ex: 5.0.1 +384 (**HOPEX V5.0 CP1**) and click **OK**
HAS instance starts

Start instance
×

Select HAS version to run this instance on node VP-JHR-V5

HAS Version for node VP-JHR-V5

HOPEX

5.0.0+793 (HOPEX V5.0 - HF1)

Ok

5.0.1+384 (HOPEX V5.0 CP1)

5.0.0+793 (HOPEX V5.0 - HF1)

10. In the left menu, select **HAS Versions**
11. You can delete previous programs (ex 5.0.0+698) in there no associated instance by clicking on the dustbin icon

AVAILABLE LOCAL HAS VERSIONS

Download new version

	Node	Bundle	Version name	Instances
	VP-JHR-V5	HOPEX	5.0.0+698 (HOPEX V5.0 - 64 bits [15.0.0+5944])	0

12. **Open** HAS Console related to the target instance and check that all module as loaded

2.3. Offline procedure (no internet access):

The procedure applies to a HAS instance.

Here, it is assumed that you have received a folder containing an offline package (downloaded previously).

To create an offline package, read document **HOPEX Application Server Installation** in online documentation for HOPEX V5.0

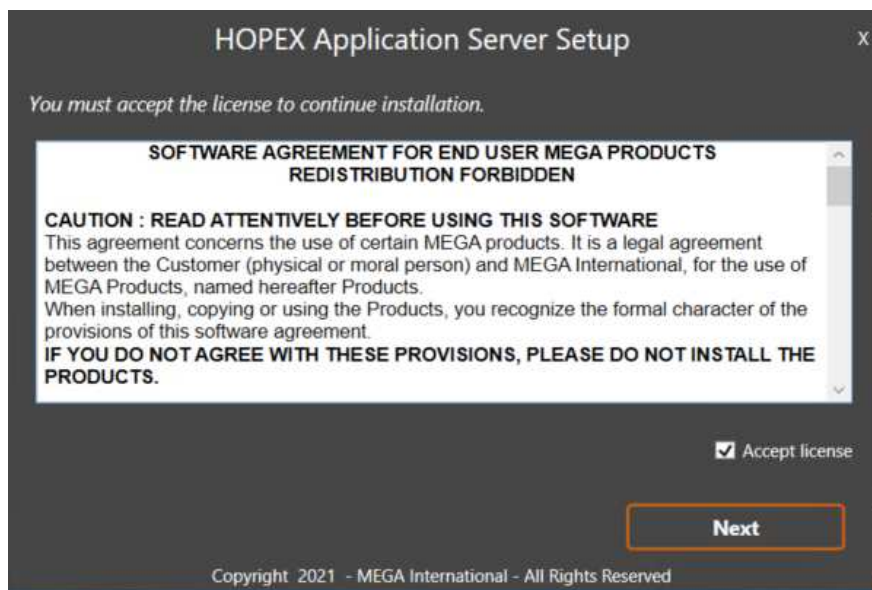
Browse the folder containing the offline package related to the hotfix.

It must contain:

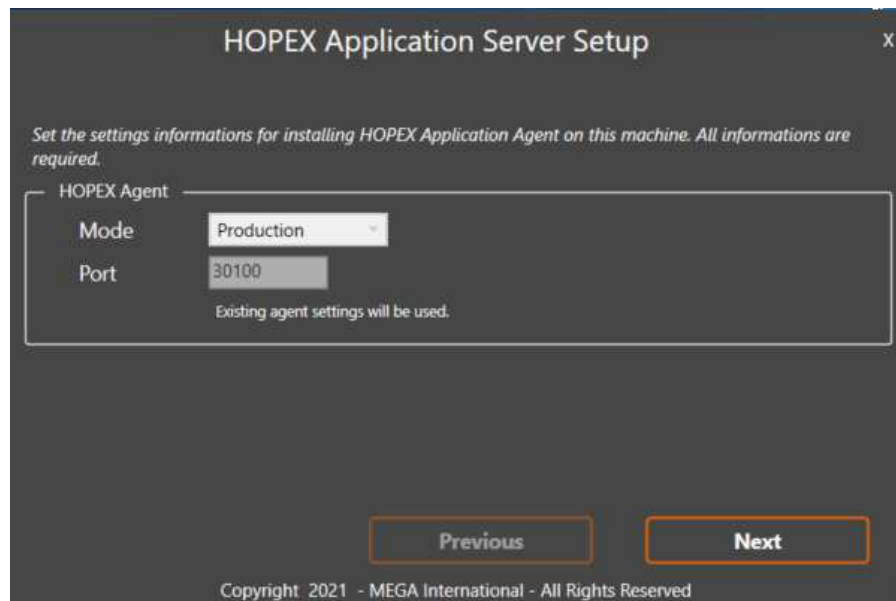
1. A file **has.setup.exe**.
2. A folder **.haspackages**.

Procedure:

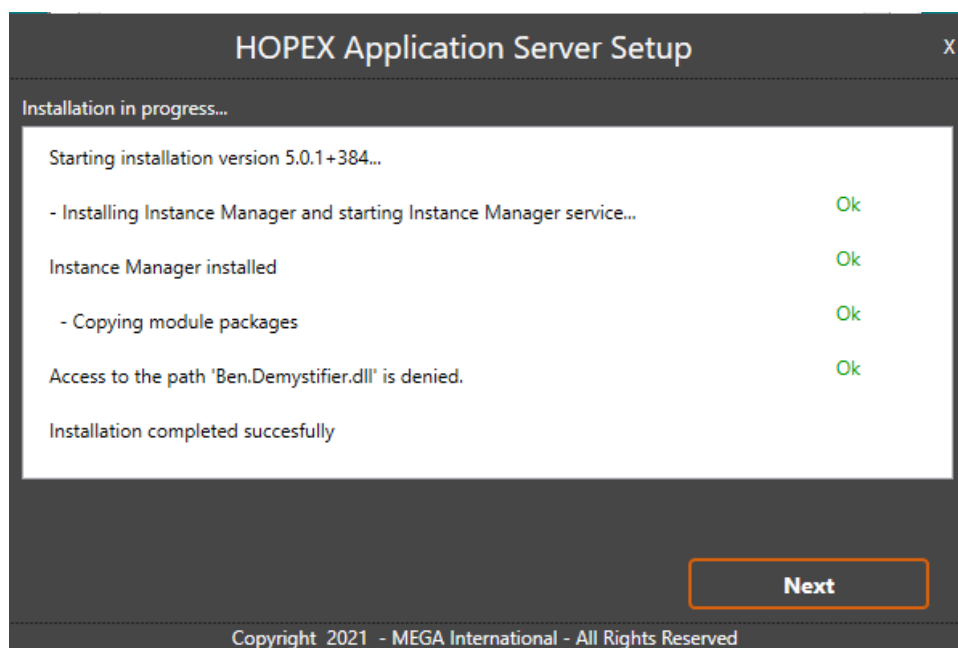
1. Run has.setup.exe as an administrator.
2. Check **Accept license** and click **Next**.



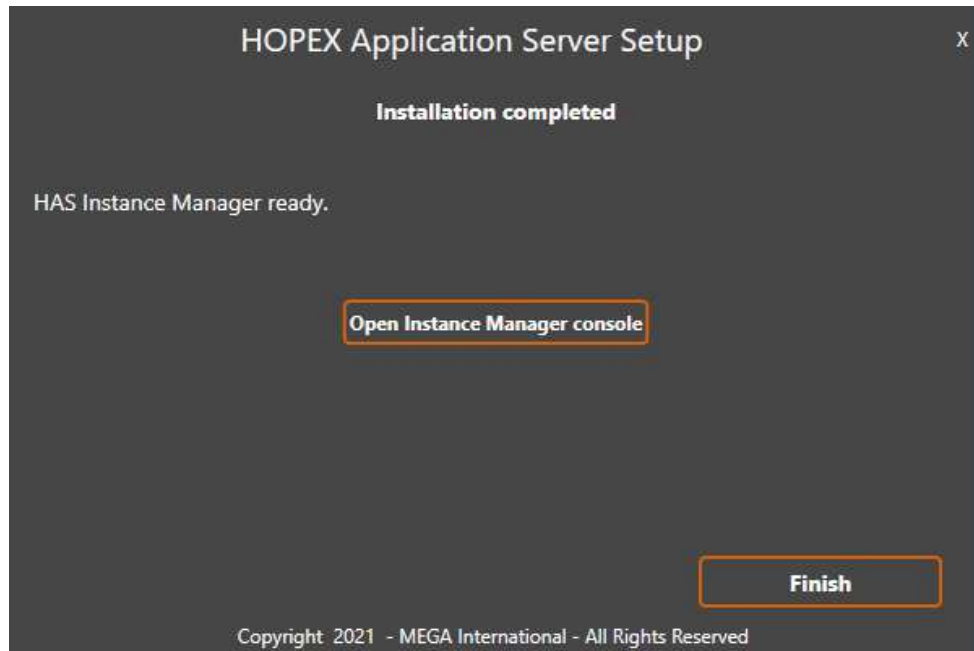
3. Keep existing settings for HOPEX Agent and click **Next**.



4. The package is installed
A message is displayed such as 'installation completed successfully'.



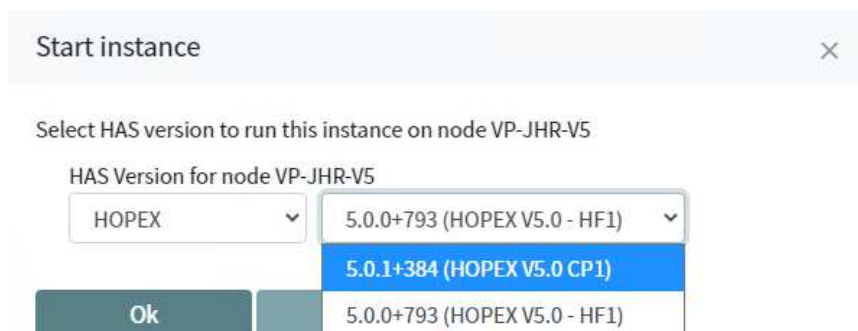
5. Click **Next**



6. Click **Open Instance Manager console**
7. Login to Instance Manager console
8. In the left menu, select **Instances**
9. Select the target instance and click **Stop** and confirm action
HAS instance stops

Cluster JHR_TrainingV5-5004 Production					https://vp-jhr-v5:5004	Add cluster node
Node	Port	Bundle	Version	Status		
VP-JHR-V5	5004	HOPEX	5.0.0+793	Stopped	Actions	▼

13. . Select the target instance and click Actions > **Start**
14. In the page 'Start instance', select carefully the target bundle (ex: 5.0.1 +384 (**HOPEX V5.0 CP1**)) and click **OK**
HAS instance starts



15. In the left menu, select **HAS Versions**

16. You can delete previous programs (ex 5.0.0+698) in there no associated instance by clicking on the dustbin icon

AVAILABLE LOCAL HAS VERSIONS

Download new version

	Node	Bundle	Version name	Instances
	VP-JHR-V5	HOPEX	5.0.0+698 (HOPEX V5.0 - 64 bits [15.0.0+5944])	0

17. **Open** HAS Console related to the target instance and check that all module as loaded

3. UPGRADING HOPEX DATA

Most changes apply to HOPEX programs. However, some changes apply to the systemdb repository. It is therefore necessary to update all HOPEX environments to benefit from all the changes and fixes. The procedure varies with the storage.

With HAS deployment, Windows Administration Console (**Administration.exe**) is installed in a subfolder of the HAS Instance: %programdata%\MEGA\Hopex Application Server\<instance port number>, ex: C:\ProgramData\MEGA\Hopex Application Server\5001

3.1. Pre-update:

Unlike previous versions, Administration.exe cannot run if all processes and services are stopped.

To enable environment upgrade, it is expected that:

- HAS Instance manager is started
- An HAS instance is created (with licence configured) and started.
- Module **Hopex.Core** is stopped
- No workspace persists.

Procedure to stop module HOPEX Core Back-end V5.0 (hopex.core):

- Select HAS instance, ex https://mymachine:5000
- Open HAS Console and login
- In HAS console, display tab Cluster
- For module HOPEX Core Back-end V5.0 (hopex.core), select action Stop on the right.

3.2. Update Procedure:

Unlike previous versions, Administration.exe cannot run if all processes and services are stopped.

To enable environment upgrade, it is required that:

- HAS Instance manager is started.
- An HAS instance is created (with licence configured) and started.
- Module Hopex.Core is stopped

Stop module HOPEX Core Back-end V5.0 (hopex.core):

- Select HAS instance, ex <https://mymachine:5000>
- Open HAS Console and login
- In HAS console, display tab **Cluster**
- For module HOPEX Core Back-end V5.0 (**hopex.core**), select action Stop on the right.

Update HOPEX environment:

1. Start **Administration.exe**.
2. Select the environment to be upgraded.
3. R click > **Open**.
4. Login with the **System** identifier.
5. Select the target environment.
6. R click > **Environment automatic update**.
A wizard 'Environment Update Center' is displayed.
 - Read text, check '**I have taken note of the above test**' and click **Next**.
 - Keep the selected actions checked and click **Run**.
 - Wait until processing is complete.
7. Exit **Administration.exe**.

3.3. Additional conversions:

Certain CP required additional conversions (after environment automatic update).

Condition	Manual conversion required	Comment
From HOPEX V5.0 to HOPEX V5.0 CP1	No need	
From HOPEX V5.0 X to V5.0 CP2 or higher	Needed. See below	Once data have been updated to CP2 or higher format, it is not required to run this conversion again
From HOPEX V5.0 X to HOPEX V5.0 CP5 or higher CP	Needed if solution HOPEX Business Continuity Management is used. See below	Once data have been updated to CP5 or higher format, it is not required to run this conversion again
Direct migration to HOPEX V5.0 CP5 or higher CP	No need	

When upgrading from HOPEX V5.0 X to V5.0 CP2 or higher

For each HOPEX environment:

1. Start **Administration.exe**.
2. Select the environment to be upgraded.
3. R click > **Open**.
4. Login with the **System** identifier.
5. For each **Data Repository**.
6. Select the Data Repository.
7. R click > **Conversions > Convert data into current version > From HOPEX V3 data**
A list of elementary conversions is displayed.
 - Select only the following conversions
 - MEGA Repository - Conversion of Business Policy names
 - MEGA Repository - Data Conversion - Conversion of Risk Mitigation, GDPR Risk and GDPR Minimization
 - Click **OK** to start the conversion
 - Wait until processing is complete.
8. Select the **SystemDb** Repository.
9. R click > **Conversions > Convert data into current version > From HOPEX V3 data**
A list of elementary conversions is displayed.
 - Select only the following conversions
 - MEGA Repository - Conversion of Profile Options
 - MEGA Repository - Conversion of query objects (V5.0 and earlier versions)
 - MEGA Repository - Deletion of System Job Executions
 - Click **OK** to start the conversion
 - Wait until processing is complete
10. Exit **Administration.exe**.

When upgrading from HOPEX V5.0 X to HOPEX V5.0 CP5 or higher CP

For each HOPEX environment:

11. Start **Administration.exe**.
12. Select the environment to be upgraded.
13. R click > **Open**.
14. Login with the **System** identifier.
15. For each **Data Repository**.
16. Select the Data Repository.
17. R click > **Conversions > Convert data into current version > From HOPEX V5 data**
A list of elementary conversions is displayed.
 - Select only the following conversions
 - **MEGA Repository - Conversion of RTO and Business Impact of BIA**
 - Click **OK** to start the conversion
 - Wait until processing is complete.
18. Exit **Administration.exe**.

3.4. Post-update:

- If you use data reading access management feature (ex-confidentiality), check that data reading access is compiled.
- Verify that environment is fully compiled (Metamodel, Technical Data and **Permissions**)
- In HAS Console
- Restart HAS Instance with the update version and check dependencies
- Test web login. No warning should be displayed.
- If you use batch automated processing (Administration API script), update HAS installation path in Windows registry.

If environment is not fully compiled

For each HOPEX environment:

1. Start **Administration.exe**.
2. Select the environment to be upgraded.
3. R click > **Open**.
4. Login with the **System** identifier.
5. Select the target environment.
6. R click > **Metamodel > Translate and Compile**.
 - Verify that checkbox **Compile Permissions...** is **unchecked**
 - Otherwise, check the **three checkboxes** below and click **Start** to compile
 - Compile Metamodel
 - Compile Technical Data
 - Compile Permissions (recommended in Production)
 - Wait until compilation process is completed.
7. Exit **Administration.exe**.

If you use batch automated processing (Administration API script)

Permissions to run PowerShell scripts are required.

For each HAS Instance:

- Browse the root folder of the HAS Instance
 - Ex: C:\ProgramData\MEGA\Hopex Application Server\5000
- Run the script HOPEX-regserver.ps1

4. FAQs

4.1.1. How to check that no user is connected to the HAS instance?

Check list of workspaces in Administration.exe.

Use supervision console.

4.1.2. How to prevent that a user connects to the HAS instance during hotfix installation?

You need to warn end users.

4.1.3. I did not install the version I wanted to. How to restore the previous version of the module?


You need to download again and install again the expected version of the module.

4.1.4. How to verify that no workspace exists in read/write mode?

Check list of workspaces in Administration.exe.

4.1.5. Error Something went wrong. Module X with version YY is older than the current version ZZ. Deployment is ignored!

This means that the version selected cannot be installed since it is older than the current version. Only upgrade is possible, not downgrade.

Something went wrong 

Module hopex.core with version 901.5719.0 is older than the current version 902.5744.0. Deployment ignored.

Close

4.1.6. Error: Module mode constraints do not match current server mode Production

This means that the version selected cannot be installed since it is not compatible with the current installation.

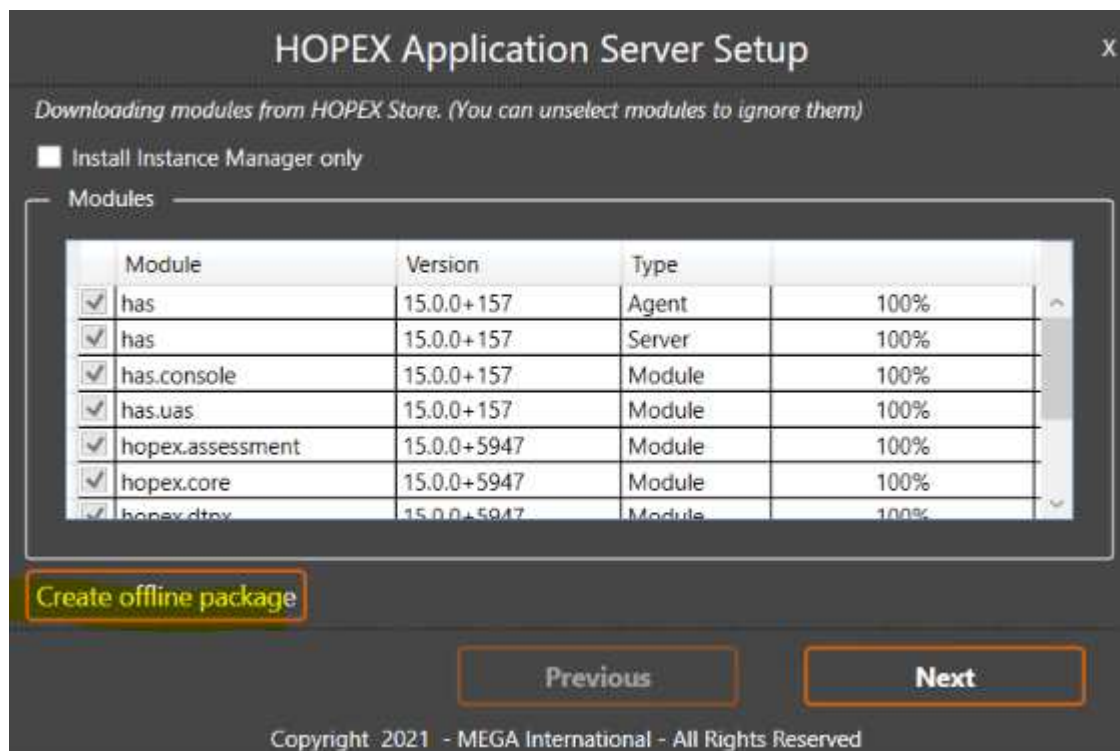


4.1.7. How to create an offline package?

You need an internet access to HOPEX Store

Run HAS installer, ex: Hopex.Application.Server-1.0.94.Setup.exe

Start installation as usual but click on button 'Create offline package'



4.1.8.How to verify data reading access compilation

For each HAS Instance:

1. Start **Administration.exe**.
2. Select the environment to be upgraded.
3. R click > **Open**.
4. Login with the **System** identifier.
5. In the administration tree, select the folder User management > Data writing access.
 - R click > **Compile**
 - Wait for end of processing (compilation completed).
6. Exit Administration.exe.

Note that this feature is not active by default

4.1.9.Unexpected login message 'You are not authorized to access this page'

When trying to login to HAS console, a message 'You are not authorized to access this page' is displayed. It likely that you tried to connect with a different login than the administrator login (Admin). Use administrator login to connect.

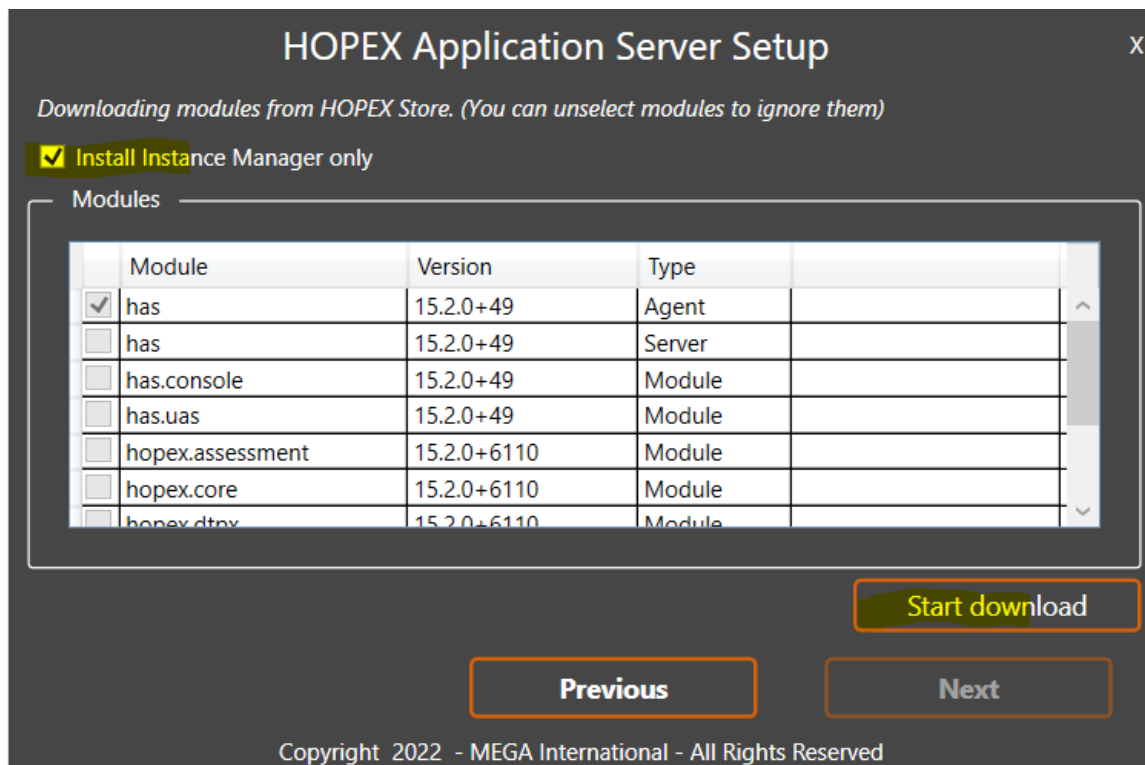
4.1.10. Unexpected error 'The Sql Server Client could not be found. ODBC Driver 17 for SQL Server may not be installed'

As said, ODBC Driver 17 for SQL Server is not installed. This is a technical requirement. Download and install ODBC Driver 17 for SQL Server.

4.1.11. Can I use the installer to update only the Instance manager

Yes. Run installer and check only Install Instance Manager Only.

Note that if the expected version of .NET core is not installed, the Instance Manager will not restart. Verify that this pre-requisite is fulfilled before running the setup.exe.



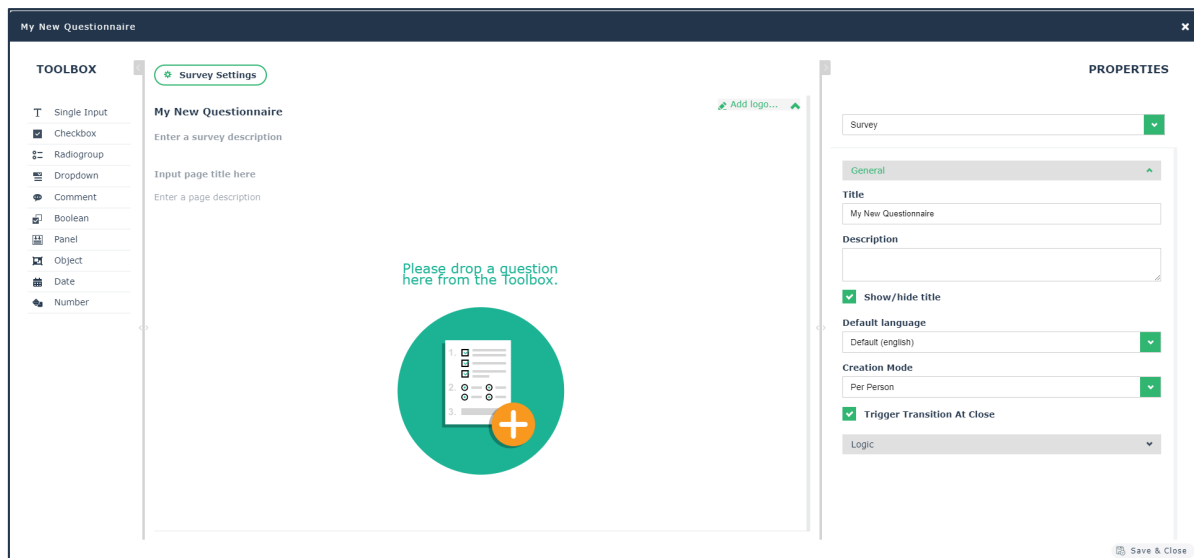
How to Migrate to Questionnaire Builder

1. Introduction	3
2. Questionnaire Template Migration Process	3
2.1. Compatibility Analysis Report	3
2.2. Not Compatible Questionnaire Templates.....	4
2.3. Compatible Questionnaire Templates	4
3. Question Types.....	5
3.1. Text.....	5
3.2. Vertical Radio	5
3.3. Combolist	5
3.4. Multiple Answer Type	5
3.5. Date	6
3.6. Number	6
3.7. Boolean	6
3.8. Multiple Values	6
3.9. Short	6
3.10. Duration	6
3.11. Object	7
3.12. OK/NO/NA.....	7
3.12.1. Aggregation Schemas	7
3.13. Percent.....	8
3.14. Signed Number	8
3.15. String.....	8
3.16. Question Group	8
3.17. Checkbox	8
4. Removed/Reviewed Features	9
4.1. Pictures in drop-down questions	9
4.2. Create HOPEX Object as answer to question	9
4.3. Questionnaire Layout.....	9
4.4. Questionnaire Template Presentation	10
4.5. Presentation Tools	10
4.6. Inherited Questions.....	10
4.6.1. Aggregation of Inherited Controls Steps	11
4.6.2. Inherited Test Steps	12
4.7. Meta Tests	12
4.7.1. Write Logical Expressions in the new Builder	13
4.8. Delegation	13
4.9. Questions Group Populated by Query	13
4.10. Questions with Link Answered Objects	13
4.11. Computed Questions	13

1. Introduction

This document provides information about the impacts of the Questionnaire Builder module for existing HOPEX users. It is intended to help understand what has been done to ensure a smooth transition to Questionnaire Builder.

NOTE: For more information on how to manage questionnaire templates through Questionnaire Builder, see the following section: [Common Features](#) > [Managing Assessments](#) > [Managing Questionnaire Templates](#).



Questionnaire Builder provides a completely renovated and modern user experience when it comes to building questionnaires for your assessment campaigns.

2. Questionnaire Template Migration Process

Before migrating to HOPEX V5, make sure all assessment/execution campaigns are closed.

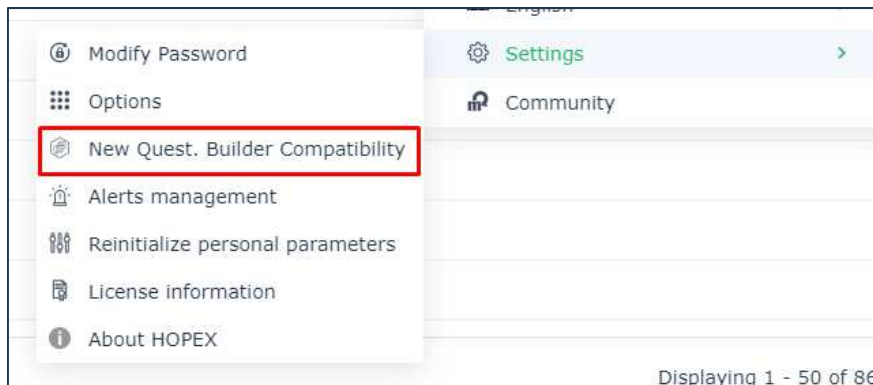
Once the migration towards the new version is completed, the following happens:

- All existing Questionnaire Templates are automatically flagged based on whether they are fully compatible with Questionnaire Builder or not.
- Question Groups defined on objects, like Test and Execution Steps for Controls, are converted to Questionnaire Templates, to provide a consistent user experience.
- All simple and multiple Direct Assessments propose a new layout to the respondent.

After migration, you can use the Questionnaires Templates Compatibility report. It enables you to double check if some elements of your existing questionnaire templates have not been converted due to compatibility issues.

2.1. Compatibility Analysis Report

To have a comprehensive understanding of the impacts of Questionnaire Builder on existing questionnaire templates, a dedicated report is available via the main menu.



This report browses all existing questionnaire templates and questions defined on HOPEX elements (like control execution and test steps). The report shows all the elements that are no longer compatible with Questionnaire Builder, with a small description of the identified issue.

This report is informative only. It should be used to make sure the migration has not introduced any major disruption from a functionality perspective.

New Questionnaire Builder Report

The table below highlights the impacts of the new questionnaire builder on your existing questionnaire templates. It provides an exhaustive list of all features used by your questionnaire templates which are no longer supported by the new questionnaire builder. You should make sure to redefine your questionnaire templates in order to address all elements listed below.

Questionnaire Template	Element	Type	Unsupported Feature Detected
[OLD]1 PPM - Project Risk Assessment	PPM - Inherent Risk	Computed Question	The logic to compute the value of the question must be rewritten in the new builder in the question Logic section.
	PPM - Net Risk		
	Business Value		
	Question-1 Identify the degree to which this application's functionality meets business needs.		
	Question-1 Indicates the level of sustainability and flexibility of the application regarding technology.		
[OLD]Application Assessment	Question-2 How complicated is the architecture of this application ?	Question with display metatest	Meta-tests used to make the question visible based on a pre-defined condition must be rewritten in the new builder if the test is based on another question.
	Question-2 How does this application "fit" with current business processes?		
	Question-3 How complex are the interfaces with other applications ?		
	Question-3 How would you rate the complexity of the key functionalities provided by the application ?		
	Question-4 Does your application need or provide information from/by other applications ?		
[OLD]Customer Journey Questionnaire Template	Question-5 How difficult it is to maintain the required application code and data.	Presentation tool	Presentation tools other than those of type Diagram are no longer supported.
	Customer Journey Assessment Date		
	Customer Journey Steps Questions	Specific question group with populating query	Questions groups which retrieve questions via a query are no longer supported.

2.2. Not Compatible Questionnaire Templates

If you try to open a non-compatible questionnaire template, an informative wizard lists all the questionnaire elements not supported by Questionnaire Builder.

You can either decide to edit the questionnaire to remove the concerned elements or launch the new builder: the elements which are not compatible will simply be disregarded by Questionnaire Builder.

2.3. Compatible Questionnaire Templates

If you try to open a compatible questionnaire template, Questionnaire Builder will automatically open in full screen mode.

3. Question Types

Questionnaire Builder not only introduces new question types. It also renames some of the question types originally provided by HOPEX.

The table below provides detailed information regarding the mapping between old HOPEX question types and new ones.

Each HOPEX question type has a dedicated section to further explain how Questionnaire Builder handles it.

HOPEX Question Type	New Builder Question Type
Text	Comment
Vertical Radio	Radiogroup
ComboList	Dropdown
Multiple Answer Type	Depending on content
Date	Date
Number	Number
Boolean	Boolean
Multiple Values	Object
Short	Number
Duration	Single Input
Object	Object
OK/NO/NA	Dropdown
Percent	Single Input
Signed Number	Single Input
String	Single Input
Question Group	Panel

3.1. Text

The question type "Text" has been renamed into "Comment".

3.2. Vertical Radio

The question type "Vertical Radio" has been renamed into "Radiogroup".

3.3. ComboList

The question type "ComboList" has been renamed into "Dropdown".

3.4. Multiple Answer Type

HOPEX provided a question of type "Multiple Answer Type". This type of question allowed to define several sub-questions of different types.

This type of question is no longer available in the new Builder. In case of existing questions of type “Multiple Answer Type”, the new Builder automatically converts them into elementary questions (one per type).

3.5. Date

The question type “Date” still exists and has kept its original name.

3.6. Number

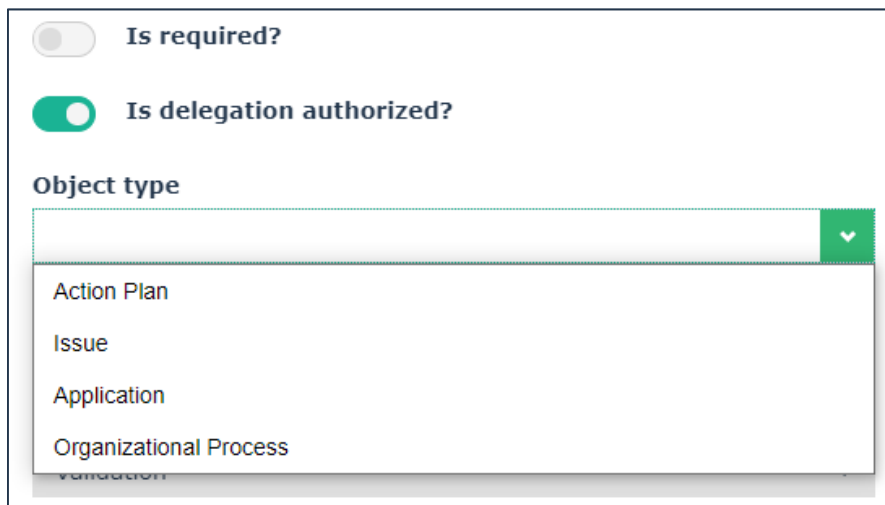
The question type “Number” still exists and has kept its original name.

3.7. Boolean

The question type “Boolean” still exists and has kept its original name.

3.8. Multiple Values

The question type “Multiple Values” has been renamed into “Object”. A parameter in the question’s property pane allows to define which HOPEX object must be used to answer the question.



The screenshot shows a configuration panel for a question type. It contains two toggle switches: 'Is required?' (disabled) and 'Is delegation authorized?' (enabled). Below these is a section titled 'Object type' with a dropdown menu. The dropdown is open, showing a list of HOPEX objects: 'Action Plan', 'Issue', 'Application', and 'Organizational Process'. The 'Application' option is highlighted in blue.

3.9. Short

The “Short” question type no longer exists. All its instances are automatically converted into the “Number” equivalent type.

3.10. Duration

The question type “Duration” does no longer exist. All its instances are automatically converted into the type “Single Input” which allows to answer with a string of characters.

3.11. Object

The “Object” question type still exists and has kept its original name. Nevertheless, only a limited number of HOPEX meta-classes are proposed in the standard version. These meta-classes are connected to the ~dmuyO(mWU1AW[Answered Element] metaclass. Therefore, if additional meta-classes must be proposed for questions of type “Object”, you just need to connect them to this metaclass.

The comprehensive list of meta-classes available in the standard is as follows:

- Action Plan
- Issue
- Application
- Organizational Process
- ~jdFzaq1Bkyb1[Column]
- ~YXRV)88Dp0G1[Attribute]
- ~JafR4ysPDHU0[Part]
- ~bSvJYPrkR9)V[Computed Concept Component]
- ~dZEodwirR1N8[Computed Part]
- ~0XEovwirRTR8[Computed Attribute]
- ~0(eRvBHhKnzc[Information Item Component]
- ~Dr22mynkRHv7[Computed Concept Information Item]
- ~PKkZR)eOBz80[Concept Component]
- ~OYRZREhzc1y0[Concept Type Component]

3.12. OK/NO/NA

The “OK/NO/NA” question type no longer exists. All its instances are automatically converted into the “Dropdown” equivalent type.

3.12.1. Aggregation Schemas

When creating new questions of OK/NO/NA type that must be used in the context of standard aggregation schemas, it is important to add the following values to the possible answers’ internal values:

- Internal Value = 1 for possible answer “OK”
- Internal Value = 2 for possible answer “NO”
- Internal Value = 3 for possible answer “NA”

Choices	
Form Entry	
Internal value	Text
1	OK
2	NO
3	NA

3.13. Percent

The “Percent” question type no longer exists. All its instances are automatically converted into the “Single Input” type which allows to answer with a string of characters.

3.14. Signed Number

The “Signed Number” question type no longer exists. All its instances are automatically converted into the “Single Input” type which allows to answer with a string of characters.

3.15. String

The “String” question type has been renamed into “Single Input”.

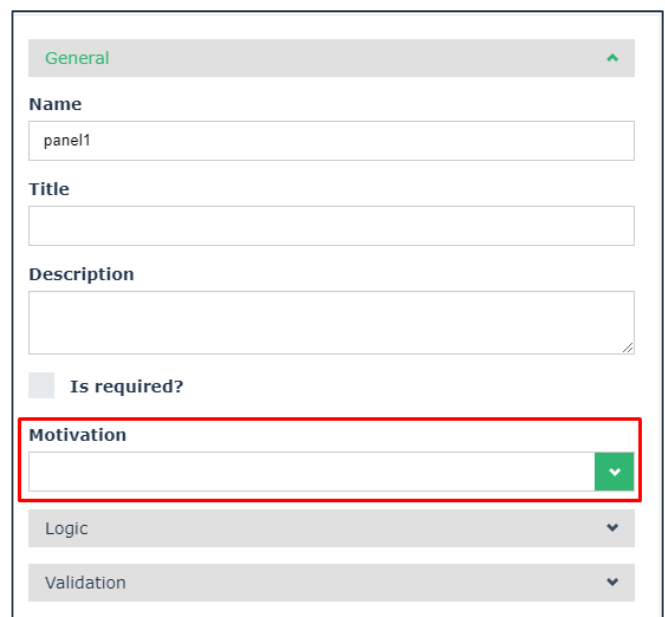
3.16. Question Group

In HOPEX a question of “Question Group” type was used for two main use cases:

- 1) To group multiple questions.
- 2) To dynamically select questions defined on meta-lasses or objects (e.g., on controls for execution and test steps).

Both use cases are still supported with the new questionnaire builder via the renamed “Panel” question type.

To specify whether the question panel should be dynamically populated with questions belonging to a specific “Questioning Motive”, a dedicated parameter called “Motivation” has been added to the panel property pane.



The screenshot shows the 'General' tab of a questionnaire builder. It includes fields for 'Name' (panel1), 'Title', and 'Description'. There is a checkbox for 'Is required?'. The 'Motivation' field is highlighted with a red box and contains a green dropdown arrow. Below the 'Motivation' field are 'Logic' and 'Validation' tabs.

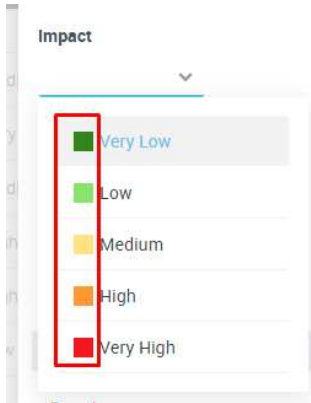
3.17. Checkbox

It is a new question type which allows to define questions with multiple possible answers of “checkbox” type.

4. Removed/Reviewed Features

4.1. Pictures in drop-down questions

Drop down questions cannot display colored icons next to the drop-down value. This was the case for questions like "Risk Impact" which were displaying a colored squared icon, based on the answer.



4.2. Create HOPEX Object as answer to question

In HOPEX V5 it is not possible to create HOPEX objects when answering questions of "Object" type. The only option is to select an existing one.

4.3. Questionnaire Layout

With Questionnaire Builder, a lot of effort was put into designing a new layout proposed to questionnaire's respondents. This new layout replaces the old ones. Therefore, tabular entry is no longer provided as an option to answer questionnaires.

4.4. Questionnaire Template Presentation

It is no longer possible to define a Questionnaire Template Presentation on the Questionnaire Template.

The only option which is still available is accessible via the properties pane of the questionnaire. It is the property:

- **Creation Mode** – To define how the questionnaires should be created in the context of a campaign (one per person, one per assessed object, one per context)

The following options are no longer available:

- Presentation Mode
- Matrix number per page
- Introduction Page Displaying
- Display an ending page
- Checks Page Displaying
- Question Comment Display
- Display a page to add documents
- Each Question in a group Displaying
- Context in a group
- Context group folded
- Scoring Displaying
- Historic Displaying
- Trigger Transition At Close
- Display explanatory documents
- Display explanatory external references

4.5. Presentation Tools

These objects are no longer supported. Nevertheless, for questionnaires on processes, the new layout automatically allows access to the process diagram, when it exists.

4.6. Inherited Questions

HOPEX allowed to define questions at the metaclass level, so that they would be automatically fetched on questionnaires assessing the metaclass instances. A practical example of this mechanism is the "Inherited Control Steps": questions defined at the Control metaclass level, that would be automatically fetched by questionnaires assessing controls.

This mechanism is no longer supported, and it has been replaced by another one.

Customers using inherited questions must re-create them in the questionnaire template used by their campaign (e.g., the "Control Execution Questionnaire" questionnaire template for the "Control Execution" assessment template).

The following screenshot shows an example of the “Control Execution Questionnaire” questionnaire template used by Control Execution assessment campaigns, where a generic question has been created, followed by a block which is dynamically populated by the control steps.

The screenshot displays the HOPEX questionnaire builder interface for a "Control Execution Questionnaire". The interface is divided into three main sections: a left sidebar, a central workspace, and a right sidebar.

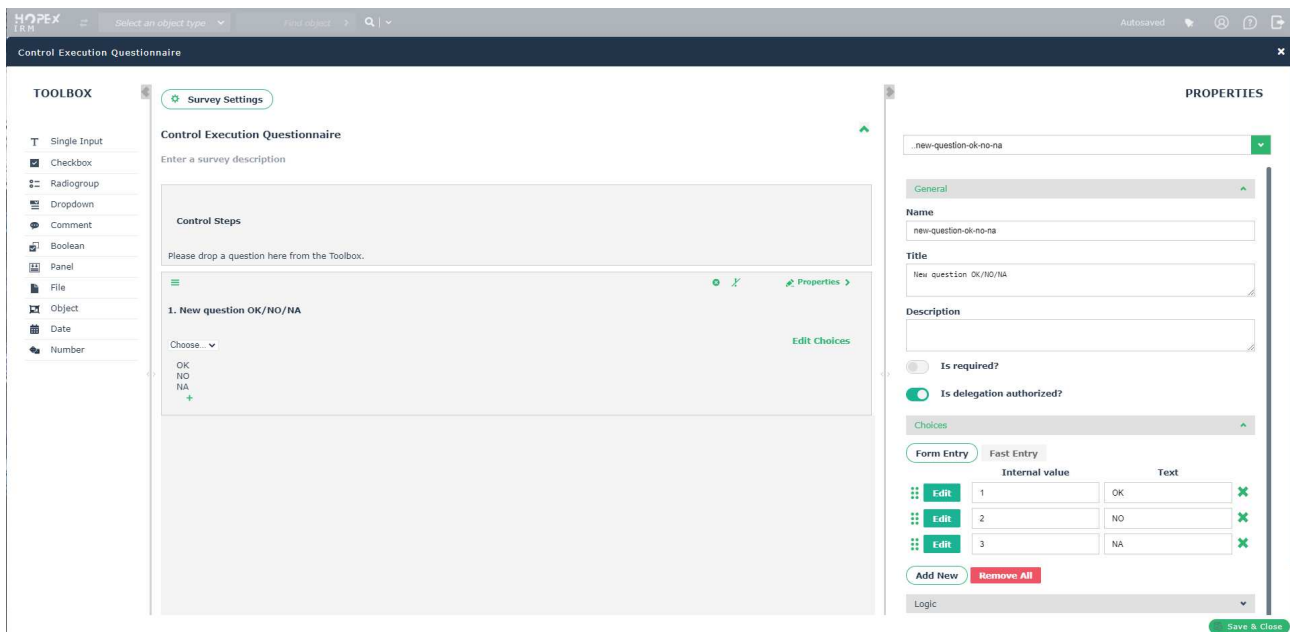
- Left Sidebar (TOOLBOX):** Contains a list of question types: Single Input, Checkbox, Radiogroup, Dropdown, Comment, Boolean, Panel, Object, Date, and Number.
- Central Workspace:** The main area for building the questionnaire. It features a "Survey Settings" tab at the top. Below it, there are fields for "Enter a survey description" and "Input page title here". The main content area is titled "Generic Question" and contains a list of questions, with the first one being "1. This is another question from Mike". Below the questions is a section labeled "Control Steps" with a prompt "Please drop a question here from the Toolbox." and a large grey area labeled "Block dynamically populated by controls' steps".
- Right Sidebar (PROPERTIES):** Contains settings for the selected question. It includes a "General" tab with fields for "Title" (Control Execution Questionnaire), "Description", "Show/hide title" (checked), "Default language" (Default (english)), "Creation Mode" (Per Person), and "Trigger Transition At Close" (checked). There is also a "Logic" section.

4.6.1. Aggregation of Inherited Controls Steps

When creating generic questions, you might want to include the question answers in an aggregation schema. To do so, you must make sure to connect the question answer to the existing scoring rule.

Below is an example where a new question of “dropdown” type, with possible answers “OK”, “NO” and “NA”, called “New question OK/NO/NA” is defined in the questionnaire template used by control execution campaigns.

The question will be asked with respect to all controls in the scope of the campaign. To make sure it is included in the aggregation schema launched once the campaign’s session has been closed, the user must connect its answer to the existing “OK/KO Scoring Rule” scoring rule.



The screenshot shows the 'Control Execution Questionnaire' configuration window. On the left is a 'TOOLBOX' with various input types like Single Input, Checkbox, Radiogroup, Dropdown, Comment, Boolean, Panel, File, Object, Date, and Number. The main area is titled 'Control Execution Questionnaire' and contains a 'Survey Settings' tab and a 'Control Steps' section. The 'Control Steps' section has a prompt 'Please drop a question here from the Toolbox.' and a list of questions, including '1. New question OK/NO/NA'. The right side shows the 'PROPERTIES' panel for the selected question, with fields for Name, Title, Description, and options for 'Is required?' and 'Is delegation authorized?'. Below these are 'Choices' and 'Form Entry' settings, including 'Internal value' and 'Text' fields.

The list of existing Assessment Templates is displayed below. To create a new Assessment Template, right-click on the relevant folder and select "New".

Assessment Template	Questionnaire ...
Control Direct Assessment	1
Control Execution	1
Definition	
Assessed Characteristics	
Scope	
Questionnaire Template	
Control Execution Questionnaire	
Questionnaire Elements	
Scoring Rules	
OK/KO Scoring Rule	
Aggregation Schemas	
Assessment Campaigns	
Assessment Sessions	
Risk Assessment per Application	1
Standard	
Assessment Template-1	0
Audit Default Assessment	1
Control Assessment IT Compliance	1
Control Assessment	1

The 'OK/KO Scoring Rule' configuration window is shown on the right. It displays the 'Scoring Rule Type' as 'Macro' and the 'Assessed Characteristic' as 'OK/NO'. The 'Characterized Object Type' is 'Control', and the 'Name' is 'OK/NO'. The 'MetaAttribute Type' is 'String'. The 'Answer' section shows a table with columns 'Short Name', 'Name', 'Value Data Type', and 'Mandatory Element'. The table contains one row: 'new-question-ok-no-na', 'ICM - technical framewor...', 'Enumeration (Combolist)', and 'No'.

4.6.2. Inherited Test Steps

It is no longer possible to define inherited test steps to be used within Test Sheets.

4.7. Meta Tests

In older versions, HOPEX allowed to define meta tests of two types on each question:

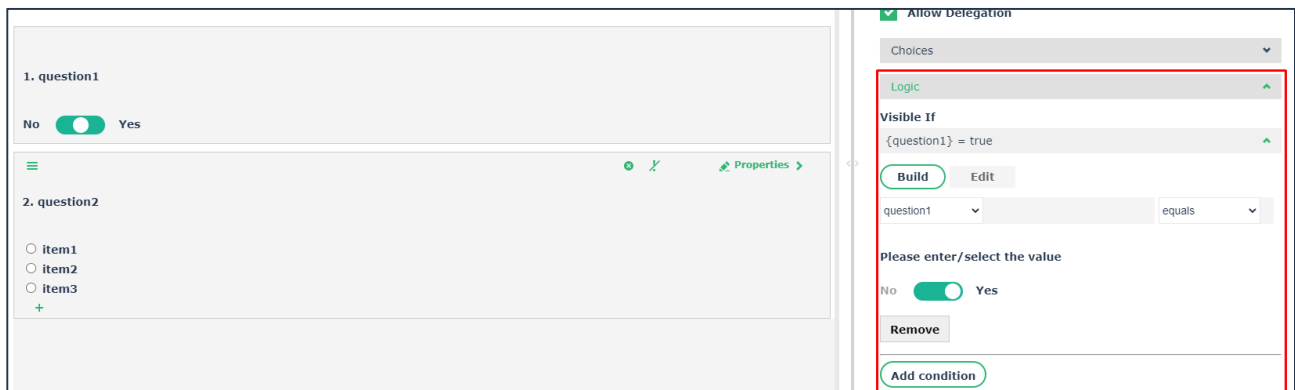
1. Those defining whether a question should be visible/mandatory or not based on the answer to previous question(s)
2. Those whose logic depends on actual HOPEX data

The former type of meta-tests will have to be rewritten in the new Questionnaire Builder.

The latter are still supported, and can be defined, accessing the question property page from HOPEX.

4.7.1. Write Logical Expressions in the new Builder

To write logical expressions affecting whether a question is visible, or mandatory based on pre-defined conditions, the user must use the dedicated Logic section, available in the new Questionnaire Builder, accessing the question property pane.



The screenshot displays the Questionnaire Builder interface. On the left, a list of questions is shown: '1. question1' with a 'Yes' toggle and '2. question2' with radio button options 'item1', 'item2', and 'item3'. On the right, the 'Properties' pane for 'question1' is open, showing the 'Allow Delegation' checkbox checked. Below this, the 'Logic' section is highlighted with a red border. It contains a 'Visible If' condition: '{question1} = true'. There are 'Build' and 'Edit' buttons, a dropdown menu showing 'question1' and 'equals', and a 'Please enter/select the value' section with a 'Yes' toggle. At the bottom of the Logic section are 'Remove' and 'Add condition' buttons.

4.8. Delegation

Delegation must now be defined at the question level. By default, every question can be delegated, otherwise the option must be disabled in the question properties pane.

This means that it is no longer possible to define delegation either at the questionnaire template level or question group level.

4.9. Questions Group Populated by Query

HOPEX allowed to define question groups which were dynamically populated by a query. This mechanism is no longer available.

4.10. Questions with Link Answered Objects

HOPEX allowed to define questions whose answer would be automatically linked to the assessed object. This mechanism was used, for instance, when answering a question via a Business Document which was then connected to the assessed object.

This feature is no longer available.

4.11. Computed Questions

HOPEX allowed to create questions whose answer was automatically computed.

This feature is no longer available.

RDBMS Repository Installation Guide

Contents

Introduction	3
Unsupported HOPEX Features in RDBMS Storage	3
Expected Advantages	3
Licensing	4
Infrastructure Requirements.....	5
RDBMS Client	5
Network Capability to Database Server	6
Database Server	6
HOPEX RDBMS Diagnostic Utility	8
Purpose	8
Running the RDBMS Diagnostic Utility	8
SQL Server support	11
SQL Server Requirements	11
Defining a HOPEX SQL Server Connection.....	13
Creating an Environment.....	16
Creating a Repository	18
HOPEX Private Workspaces Cleanup.....	20
HOPEX Historical Data Cleanup	21
Batching Cleanup procedures for SQL Server	24
Maintenance tasks	27
HOPEX RDBMS repositories specific administration actions	37
Migrating Your Data from One Storage Support to Another	37
Restoring a HOPEX environment from formatted data.....	40
Handling of HOPEX RDBMS repositories specific internal format	45
Vocabulary	48
Appendix - FAQs.....	50

Introduction

This technical article describes the procedures and best practices for deploying the HOPEX application on a relational database server (SQL Server).

This deployment applies to **HOPEX V5**.

Unsupported HOPEX Features in RDBMS Storage

When a HOPEX repository is stored on an RDBMS, HOPEX does not support the following features:

- MySQL RDBMS
- Oracle RDBMS
- Offline mode
- Repository protection
- Mixed environments
 - MEGA proprietary format (GBMS storage format) repository and repositories stored on an RDBMS. For example, a GBMS environment (SystemDb) and one or more repositories stored on SQL Server. The opposite is also not supported (SQL Server environment with GBMS repositories within).

Expected Advantages

The advantages expected from an RDBMS deployment are:

- Compliance with company-wide IT standards.
- Guarantee of scalability and security.
- Quicker dispatch time. In particular with “big” HOPEX private workspaces (HOPEX private workspaces with many creations/deletions/updates).

With this type of architecture, HOPEX supports global deployment on the same repository. In particular, it enables bypassing some limits related to the GBMS storage format.

- Maximum limit of 510 concurrent private workspaces per environment. No limit is identified in the HOPEX application for SQL Server storage format.
- Maximum limit of 24 GB of data per HOPEX repository. No limit is identified in the HOPEX application for SQL Server storage format.

With the RDBMS storage format, the HOPEX environment contains unshared files. All the data accessed during the execution of the HOPEX application is stored in the RDBMS. The RDBMS guarantees scalability and security.

Licensing

The “HOPEX repository storage (SQL Server)” product is required on the license to gain access to the RDBMS storage feature. The license can be dedicated to the workstation or shared by a group of users. All users connecting to HOPEX must have access to this license as well as to other products (HOPEX IT Architecture...).

Infrastructure Requirements

RDBMS Client

An RDBMS Client is necessary on each workstation that uses HOPEX with data stored on an RDBMS.

- **SQL Server**

Installation of Microsoft ODBC Driver 17 or 18 for SQL Server is required.

This Microsoft ODBC Driver 17 or 18 for SQL Server is compatible with the 2019 versions of SQL Server. See corresponding Microsoft articles for more details:

- [System Requirements, Installation, and Driver Files - ODBC Driver for SQL Server | Microsoft Docs](#)

Download it from Microsoft download website:

- <https://aka.ms/downloadmsodbcsql>

Network Capability to Database Server

On a client computer running HOPEX, it is recommended to ping the RDBMS server with a filled buffer to have an evaluation of the infrastructure. To do this, download the **hrPING** freeware tool available at <https://www.cfos.de/en/ping/ping.htm>. To use this tool, you must first accept the terms of the licence. Use it with the following command in a command window from a computer that will be running HOPEX:

```
hrping.exe -W -l 5000 -n 50 -y <RDBMS Server name or IP>
```

Example for this command output:

```
Statistics for <RDBMS Server name or IP>:  
Packets: sent=50, rcvd=49, error=0, lost=1 (2% loss) in 24.500562 sec  
RTTs of replies in ms: min/avg/max/dev: 0.338 / 0.535 / 0.637 / 0.048  
Bandwidth in kb/sec: sent=10.260, rcvd=10.055
```

If the value returned for **"RTTs of replies in ms/avg"** (0.535 in the example) is higher than 1 ms, contact MEGA. See hrPING help for details on this command.

Database Server

The following sections will help your database administrator (DBA) size the Database server according to the profiles and the number of HOPEX users you plan to use.

Server disk size

Each new object takes up 30 KB on a disk (object with its attributes and links).

If you activate the HOPEX Repository Log file each action on the HOPEX repository creates an object.

You should reserve 5GB on the server disk.

Reminder:

HOPEX will stop working if the datafile is full. To avoid this, the databases can be created with the autoextend property activated. If this is not possible, the datafiles growth must be monitored carefully in order to provide more space if fullness is about to be reached.

Number of connections opened by HOPEX on the RDBMS for each HOPEX workstation

This information will help you define the amount of memory (RAM) required for the database instance used to run HOPEX on the database server

- **SQL Server**

One connection is used for each RDBMS storage. It means that, when a HOPEX User is connected to HOPEX, two connections to SQL Server are open (one for the SystemDb and one for the User repository).

An additional connection is used for each RDBMS storage when you use the HOPEX locks.

Each opened connection uses 24 KB of memory on the SQL Server.

HOPEX RDBMS Diagnostic Utility

Purpose

MEGA provides a Java based utility that should be used before starting to use environments and repositories on an RDBMS. This utility runs several tests for which the results will be compared to some memorized values corresponding to a situation where HOPEX is likely to have close-to-optimum performances.

The **RDBMS Diagnostic** utility is available in MEGA HOPEX Store (store.mega.com).

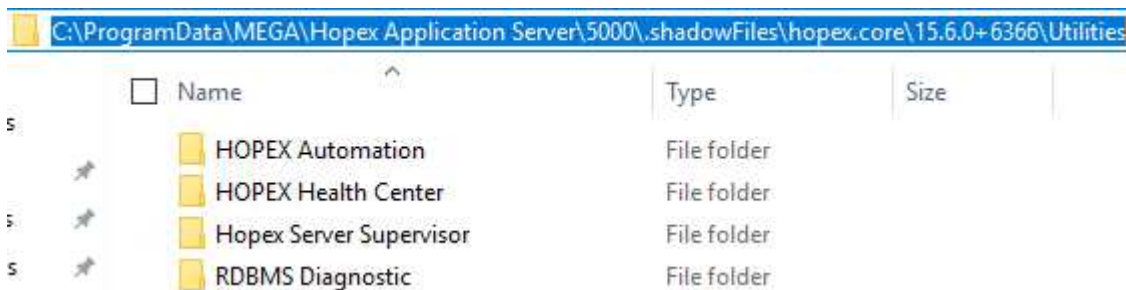
Running the RDBMS Diagnostic Utility

A batch file was created to run the tool.

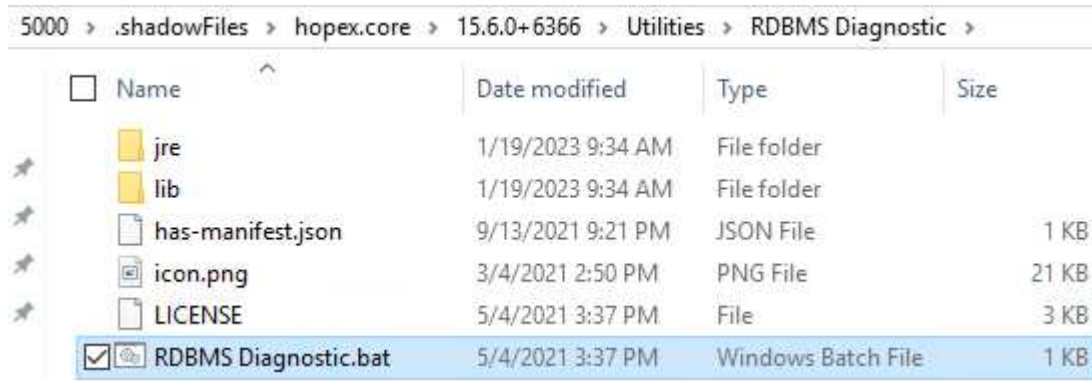
To run the RDBMS Diagnostic Utility:

1. From MEGA HOPEX Store (store.mega.com), download **RDBMS Diagnostic** module.
2. Extract the content of the “RDBMS Diagnostic.zip” compressed file, for example in the **<HOPEX installation> > Utilities** folder:

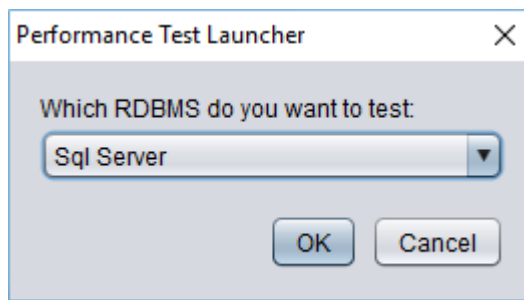
For example: ``C:\ProgramData\MEGA\HOPEX Application
Server\5000\shadowFiles\hopex.core\15.6.0+6366\Utilities``



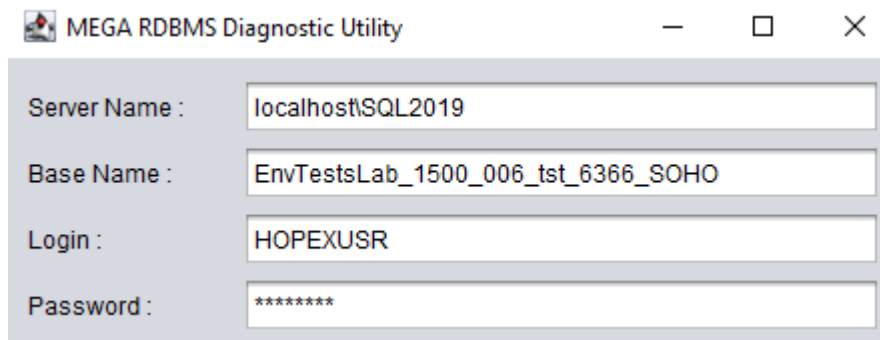
3. In the **RDBMS Diagnostic** folder, execute the **RDBMS Diagnostic.bat**.



4. Keep the RDBMS type (SQL Server):



5. Enter the connection information to the RDBMS storage that is the target for hosting the HOPEX data:
- the server name
 - a database name



6. Click **Start Tests**.
7. To get consistent times, the **Expected Execution Time** values were recorded after running the utility more than once and noticing that the values were stable.

So to get results that can be considered valid, run the utility twice and consider the values of the 2nd run.

Here is an example of test results:

Test Name	Execution Time (ms)	Expected Execution Time (ms)	Test Result
✓ DDL	31	20	too long
✓ INSERT (LIGHT)	19606	29000	Ok
✓ INSERT (LIGHT, server level)	2469	4300	Ok
✓ INSERT (HEAVY)	7953	14000	Ok
✓ READ (LIGHT)	5547	9000	Ok
✓ READ (HEAVY)	22437	34000	Ok
✓ SERVER CPU SPEED	5782	7500	Ok
✓ SERVER DISK	17719	20000	Ok
✓ SERVER DISK (BLOB's)	16800	20000	Ok
✓ BANDWIDTH	13656	24000	Ok
✓ BANDWIDTH (BLOB's)	6450	40000	Ok
✓ RESET DB	47	100	Ok

Test Description :

Creation of 2 Tables called TEST1 and TEST2.
 Each table has 3 columns: ID BIGINT, NAME VARCHAR(1024), BLOB VARCHAR(max).
 Creation of the index TEST1(ID), TEST1(NAME), TEST2(ID), TEST2(NAME).

Diagnostic :

OK: time=17719ms , expected time=20000ms
 TEST 9 (SERVER DISK (BLOB's)):
 OK: time=16800ms , expected time=20000ms
 TEST 10 (BANDWIDTH):
 OK: time=13656ms , expected time=24000ms
 TEST 11 (BANDWIDTH (BLOB's)):
 OK: time=6450ms , expected time=40000ms
 TEST 12 (RESET DB):
 OK: time=47ms , expected time=100ms
 ##### Batch Test Finished: Thu Jan 19 09:52:52 CET 2023 #####

☐ Auto Commit ☐ Loop Test

Copy Diagnostic to Clipboard

Start Tests Stop Tests Close

SQL Server support

SQL Server Requirements

Encoding

After the database has been created, verify that "Collation" is set to "SQL_Latin1_General_CP1_CS_AS". If the database is created from the HOPEX application, the appropriate encoding is automatically configured.

User management

When the HOPEX application accesses the HOPEX data stored in the RDBMS, it uses an SQL connection string. This connection string refers to a user account that has certain privileges for the instance.

This user can either be a native account, or a Windows account:

- **Native account:**
 - **Pros:** unique account, configured for everyone that runs the Web Front-End or Windows Front-End clients.
 - **Cons:** thought to be less secure.
- **Windows accounts/Domain account:** Trusted Connection
 - **Pros:** do not set up any connection string in the tool.
 - **Cons:** need to authorize several Windows accounts to have direct access to the data: the service account that runs the Instance manager, every user that needs to run the Windows Front-End client (Administration.exe or Hopex.exe).

[Privileges for native account](#)

You can have several kinds of SQL server users in relation to the customer security policy:

- **Standard security policy:** the user account is enabled to manage databases. This is the easiest solution especially if the SQL Server instance is dedicated to HOPEX.

User type	Comment	Server roles	Database roles	Server permissions
User with maximum privileges	Allowed to manage any database (create database, delete database, data read access, data write access, update database structure)	dbcreator	db_owner (1)	View server state (3)

- **Advanced security policy:** only the DBA is allowed to create new databases following specific naming rules. A user is required to use the existing databases.

User type	Comment	Server roles	Database roles	Server permissions
User with limited privileges	Allowed to use an existing database (data read access, data write access, update database structure)	public	db_owner (2)	View server state (3) sys.dm_db_index_physical_stats sys.indexes sys.stats FUNCTION::DB_ID

(1) db_owner role is automatically assigned by the system when a database is created.

(2) db_owner role is manually assigned by the DBA after database creation.

(3) To consult the view 'sys.dm_exec_sessions' for the server.

```
GRANT SELECT ON sys.dm_db_index_physical_stats TO [User];
GRANT SELECT ON sys.indexes TO [User];
GRANT SELECT ON sys.stats TO [User];
GRANT EXECUTE ON FUNCTION::DB_ID TO [[User];
```

The HOPEX application will create table, columns and index objects dynamically. The right to create Procedures is mandatory. Trigger, functions and view objects are not used.

Privileges for Windows accounts

Since this configuration requires to grant access to the different databases to several Windows accounts, and especially to accounts of people running the thick client of the application, it is recommended to limit those rights to a minimum, to reduce the risk of harming the application by directly modifying or deleting data.

- **Advanced security policy:** only the DBA is allowed to create new databases following specific naming rules. A user is required to use the existing databases.

User type	Comment	Server roles	Database roles	Server permissions
User with limited privileges	Allowed to use an existing database (data read access, data write access, update database structure)	public	db_ddladmin, db_datawriter and db_datareader (2)	View server state (3) sys.dm_db_index_physical_stats sys.indexes sys.stats FUNCTION::DB_ID

(2) These roles are manually assigned by the DBA after database creation.

(3) To consult the view 'sys.dm_exec_sessions' for the server.

```
GRANT SELECT ON sys.dm_db_index_physical_stats TO [User];
GRANT SELECT ON sys.indexes TO [User];
```

```
GRANT SELECT ON sys.stats TO [User];

GRANT EXECUTE ON FUNCTION::DB_ID TO [[User];
```

The HOPEX application will create table, columns and index objects dynamically. The right to create Procedures is mandatory. Trigger, functions and view objects are not used.

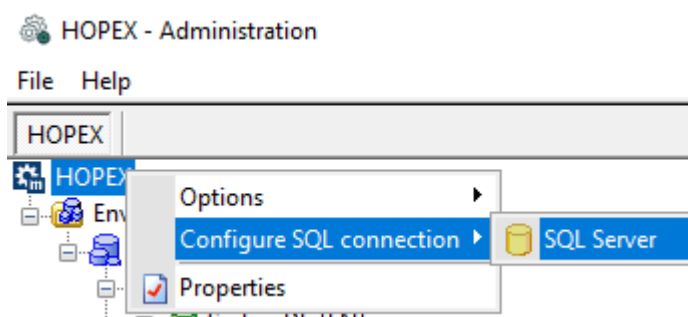
The Windows users **should not** have the "db_creator" server role.

Defining a HOPEX SQL Server Connection


A **Configure SQL Connection** menu is available in the HOPEX Administration application at different levels (site, environment, and repository) if the license contains the Repository Storage (SQL Server) product.

Procedure with a native SQL account

1. Start HOPEX **Administration.exe**.
2. Right-click HOPEX (the root of the administration tree) and select **Configure SQL connection > SQL Server**.

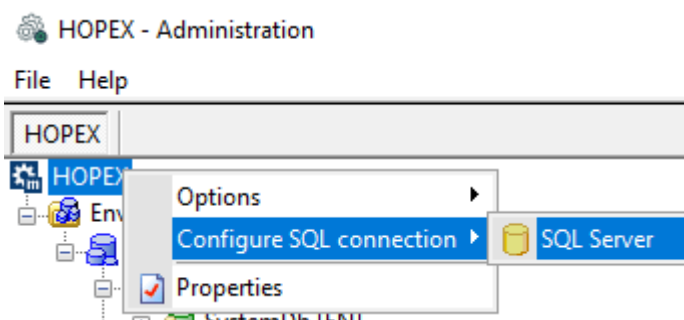


3. Enter the connection parameters.
 - **Instance:** <machine network name>\<SQL Server instance name> (1)
Example for a standalone installation with SQL Express: MyMachine\SQLEXPRESS
 - **User:** user enabled to access/update SQL Server
 - **Password:** password of the user enabled to access/update SQL Server

 **Warning:** Ensure this password is consistent with MS SQL rules, see MS related documentation.
4. Click **Connection Test** to check the connection parameters.

Procedure when using Windows authentication

1. Start HOPEX **Administration.exe**.
2. Right-click HOPEX (the root of the administration tree) and select **Configure SQL connection > SQL Server**.



3. Set the connection parameters.
 - o **Instance:** <machine network name>\<SQL Server instance name> (1)
Example for a standalone installation with SQL Express: MyMachine\SQLEXPRESS
 - o **User:** leave blank
 - o **Password:** leave blank
 - o **Parameters :** set "Trusted_Connection=Yes;" You may need to add Encrypt=no or Encrypt=Yes
4. Click **Connection Test** to check the connection parameters.

Connection Parameters (SQL Server) ✕

Instance :	<input type="text" value="myserver\myinstance"/>	<input type="button" value="Test Connection"/>
User:	<input type="text"/>	<input type="button" value="Test GRANTs"/>
Password:	<input type="password"/>	
Parameters:	<input type="text" value="Trusted_Connection=Yes;"/>	

Creating an Environment

The environment creation mainly consists in creating a SystemDb repository. For SQL server, two creation modes are available from HOPEX:

- Creating a new database on the SQL Server (standard security policy)
- Using an existing database of the SQL Server (advanced security policy)

Prerequisite

Before creating an environment, download the **HOPEX Environment Installation Package V5.0** module from HOPEX store (<https://store.mega.com/modules/details/hopex.core.install>) and import it in HAS Console modules.

Creating a new SystemDb database

Prerequisite:

- Identify the SQL connection parameters (RDBMS instance, user, password)
- Identify the location of the environment folder on the file server

Procedure:

1. Start HOPEX **Administration.exe**.
2. Right-click the **Environments** folder and select **New**.
3. Enter the environment **Name**.
This creates a folder on the file server.
4. (If needed) Change the **Location**.
5. Click **OK**.
6. Confirm or change SQL Connection parameters.
7. As the **Repository Creation Mode** select "Create Database" .
8. Click **Test Connection** to check that the SQL Server is reachable. This step must be successful for the process to continue.
9. Click **Test GRANTS** to check different actions (table creations, indexing columns etc.) that are necessary for HOPEX to be able to work. This step must be also successful for the process to continue.
10. Click **OK** to start the environment creation.

Result:

- A SystemDb repository stored in the selected RDBMS instance is created.
- A folder (HOPEX environment folder) is created at the selected location.
This folder contains several files and subfolders (Db, Mega_usr, SysDb).

Using an existing SystemDb database

Prerequisite:

- Identify the SQL connection parameters (RDBMS instance, user, and password).
- Identify the location of the environment folder on the file server.
- **Check that the “Collation” property of the database is set to “SQL_Latin1_General_CP1_CS_AS”.**
- Identify the exact name of the user database in the SQL Server. It follows this naming rule:

`<EnvironmentName>_SystemDb`

Example: `MyEnvironment_SystemDb`

Note: the environment name must match the environment folder.

Procedure:

1. Start HOPEX **Administration.exe**.
2. Right-click the **Environments** folder and select **New**.
3. Enter the environment “Name” (in this example: “Name” = “MyEnvironment”) This creates a folder.
4. (If needed) Modify the **Location**.
5. Click **OK**.
6. Confirm or change the SQL Connection parameters.
7. As **Repository Creation Mode** select “Uses an existing SQL database (“[dbo]” default schema)”.
8. Click **Test connection** to check that the SQL Server is reachable.

This step must be successful for the process to continue. If “Use existing database” option was specified, this test tries to connect to the database matching the following pattern: “MyEnvironment_SystemDb”. This test must be successful for the process to continue.

9. Click **Test Grants** to check different actions (tables creations, indexing columns etc.) that are necessary for HOPEX to be able to work. This test must be also successful for the process to continue.
10. Click **OK** to start the environment creation.

Result:

- The SystemDb repository is initialized.
- A folder (HOPEX environment folder) is created at the selected location. This folder contains several files and subfolders (Db, Mega_usr, SysDb).
- Default users:
 - **Identifier:** System, **Password:** Hopex (or empty for previous HOPEX versions)
 - **Identifier:** Mega, **Password:** Hopex (or empty for previous HOPEX versions)

Creating a Repository

Two creation modes are available from HOPEX:

- Creating a new database on the SQL Server (standard security policy).
- Using an existing database of the SQL Server (advanced security policy).

Creating a new SQL Server database

Prerequisites:

- Identify the SQL connection parameters (RDBMS instance, user, and password).

Procedure:

1. Start HOPEX **Administration.exe**.
2. Connect to the environment concerned.
Use for example: **Identifier**: System, **Password**: Hopex (or empty for previous HOPEX versions).
3. Right-click the **Repositories** folder and select **New**.
4. Enter the repository **Name**.
5. Keep the default **Location**.
6. Keep the **Import module standard data** option selected.

This option enables to import the .xmg files of the modules already deployed on the HAS instance.

Note: If you create several repositories, clear the **Import module standard data** option and once all of your repositories are created launch the **Environment Automatic Update**. Else, keep the option selected for the last repository creation only.

7. Click **OK**.
8. Confirm or change the SQL Connection parameters.
9. As **Repository creation mode** keep "Creates the SQL database ("[dbo]" default schema)".
10. Click **Test connection**. The test must be successful for the process to continue.
11. Click **Test GRANTS**. The test must be successful for the process to continue.
12. Click **OK** to create the new database

Result:

- A repository is created in SQL server. It follows this naming rule:

`<EnvironmentName>_<RepositoryName>`

Example: MyEnvironment_SQLServerRepository

- A folder is created in the specified location.
This folder contains an EMV and an EMQ file.

Using an existing SQL Server database

Prerequisites:

- Identify the SQL connection parameters (RDBMS instance, user, and password).
- **Verify that the property 'Collation' of the database is set to 'SQL_Latin1_General_CP1_CS_AS'**
- Identify the exact name of the user database in the SQL Server. It follows this naming rule:

`<EnvironmentName>_<RepositoryName>`

Example: `MyEnvironment_SQLServerRepository`

Note that the environment name must match the actual environment folder.

Procedure:

1. Start HOPEX **Administration.exe**.
2. Connect to the environment concerned.
3. Right-click the **Repositories** folder and select **New**.
4. Enter the repository **Name**.
E.g.: `SQLServerRepository`
5. Click **OK**.
6. Confirm or change the SQL Connection parameters.
7. As **Repository Creation Mode** select “Uses an existing SQL database (“[dbo]” default schema)”.
8. Click **Test** to check that the login can be performed and that the database exists.
9. Click **Test connection**. The test must be successful for the process to continue.
10. Click **Test GRANTS**. The test must be successful for the process to continue.
11. Click **OK**.

Result:

- A repository is referenced in the SQL server and initialized.

Example: `MyEnvironment_SQLServerRepository`

- A folder is created in the specified location.

`<this folder contains a .EMV and a .EMQ file.`

HOPEX Private Workspaces Cleanup

This procedure is used to delete the data of terminated private workspaces of HOPEX Users. It is necessary to clean up these data often in order to reduce database growth and preserve good performances. We recommend running this procedure every week if you have less than 10 users and every night if you have more than 10 users.

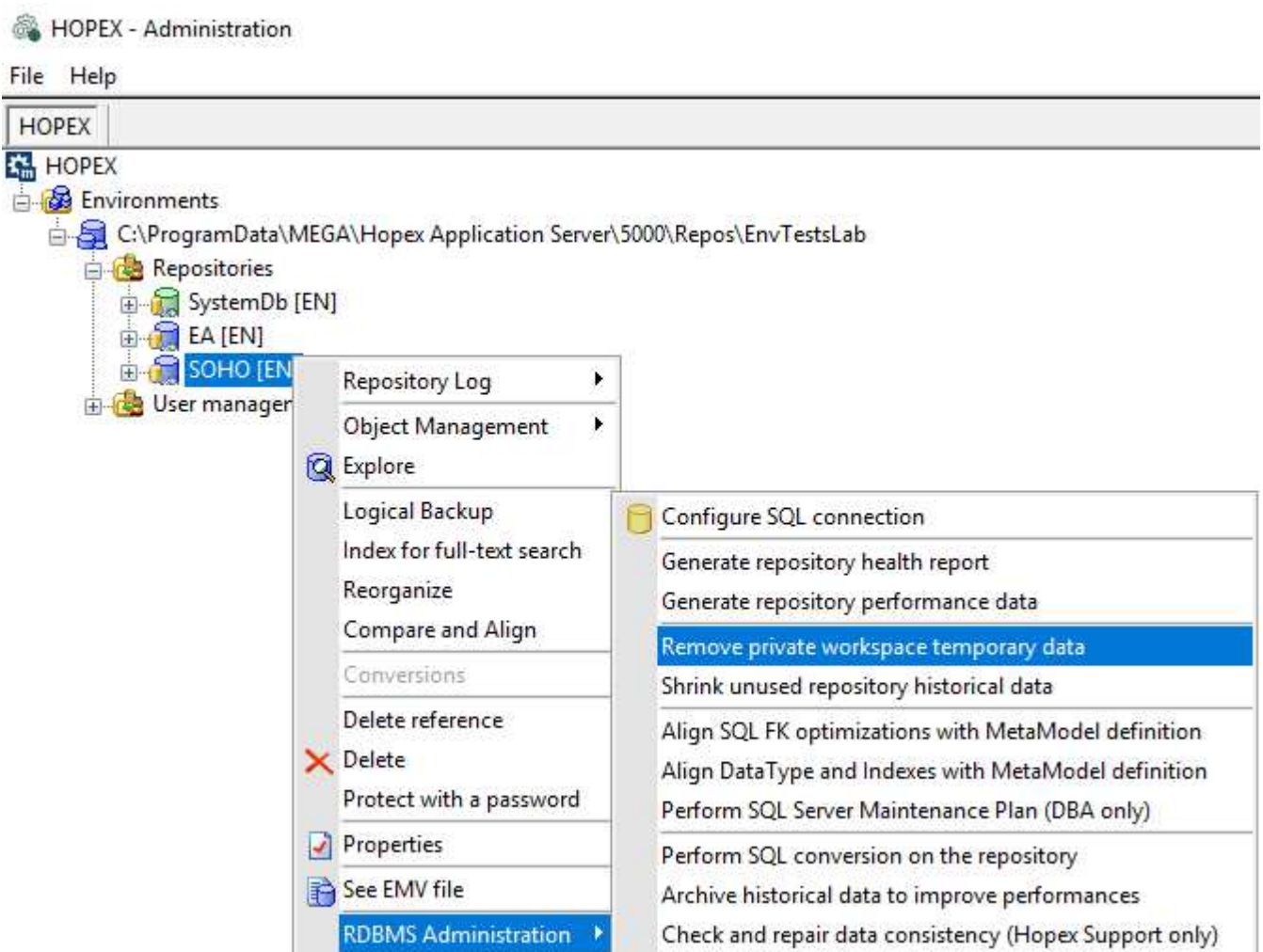
Installing the procedure

Warning: You must repeat this procedure for each HOPEX Repository and the SystemDb.

1. Right-click your HOPEX repository and select **RDBMS Administration > Remove private workspace temporary data**.

This will launch SP_CLEAN_MEGA_DATABASE and if the procedure:

- does not exist, the application will create it.
- already exists, it is overwritten by this action.



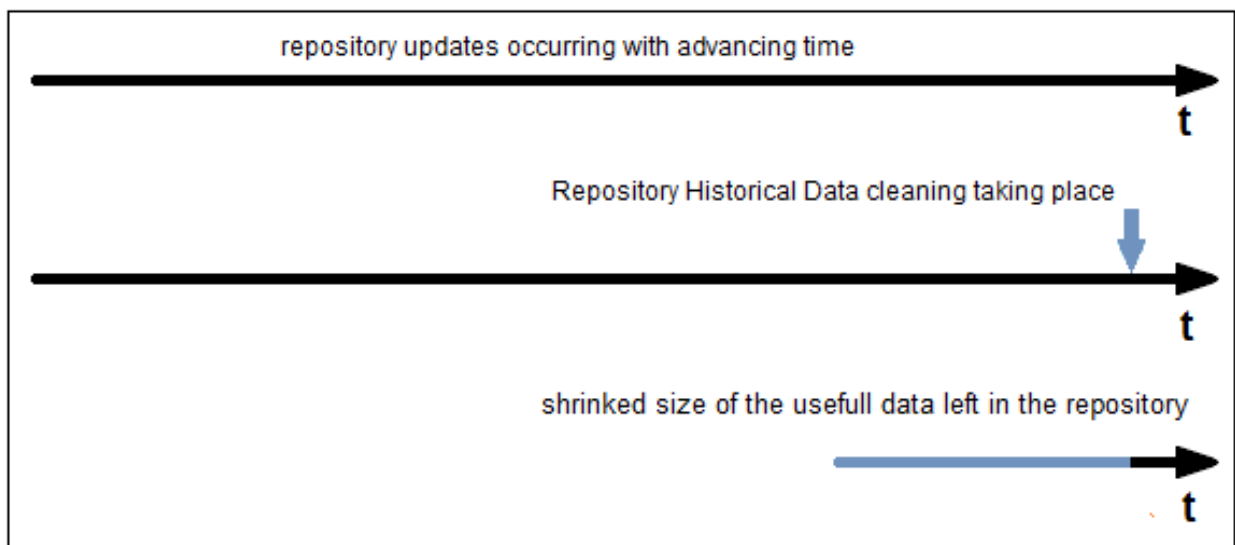
HOPEX Historical Data Cleanup

This procedure is used to delete the historical data of the HOPEX repository. Each time a HOPEX object is updated, the previous data is kept in database. That method insures a high data security even when connection to SGBD is interrupted. It is necessary to clean up these data often in order to reduce database growth and preserve good performances. This clean-up will have no impact on the repository logfile. We recommend running this procedure every week if you have less than 10 users and every night if you have more than 10 users.

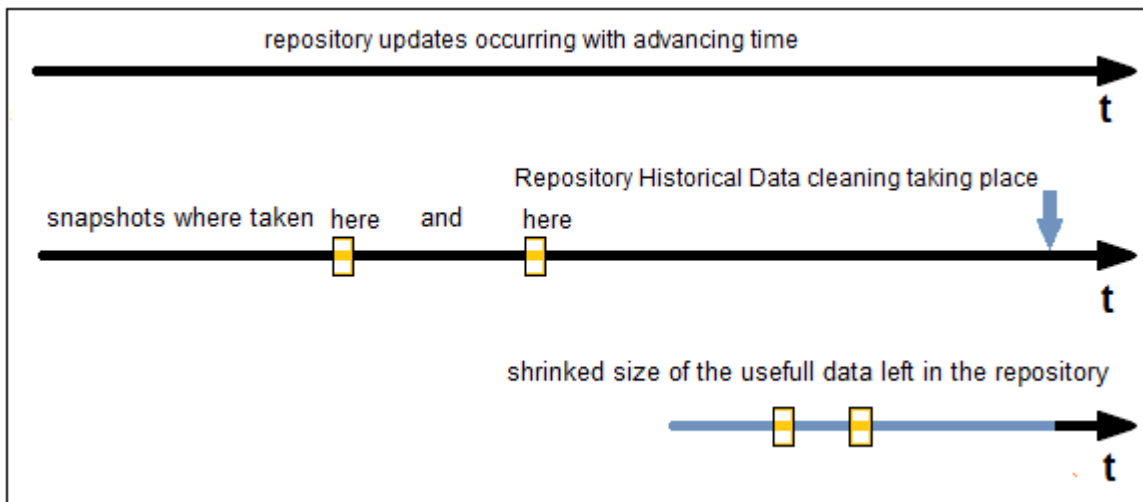
Before cleaning Historical Data

Historical data are used in the Repository Snapshot mechanism. See HOPEX Common Features > Other Features > Using Repository Snapshots: **Repository Snapshot Prerequisites** section for more details.

If you need to have Repository Snapshots taken, be aware that it will not be possible anymore for the period of time covered by the cleanings. In other words, if you need Repository Snapshots, be sure to take them before the procedure runs.



In this first illustrated case, all archived states were deleted, so all the space that these archived states were using is reclaimed physically (an actual delete in the tables was issued for every one of them).



In this second example, all archived states were also deleted except those corresponding to the state of the repository when the 2 Snapshots were taken.

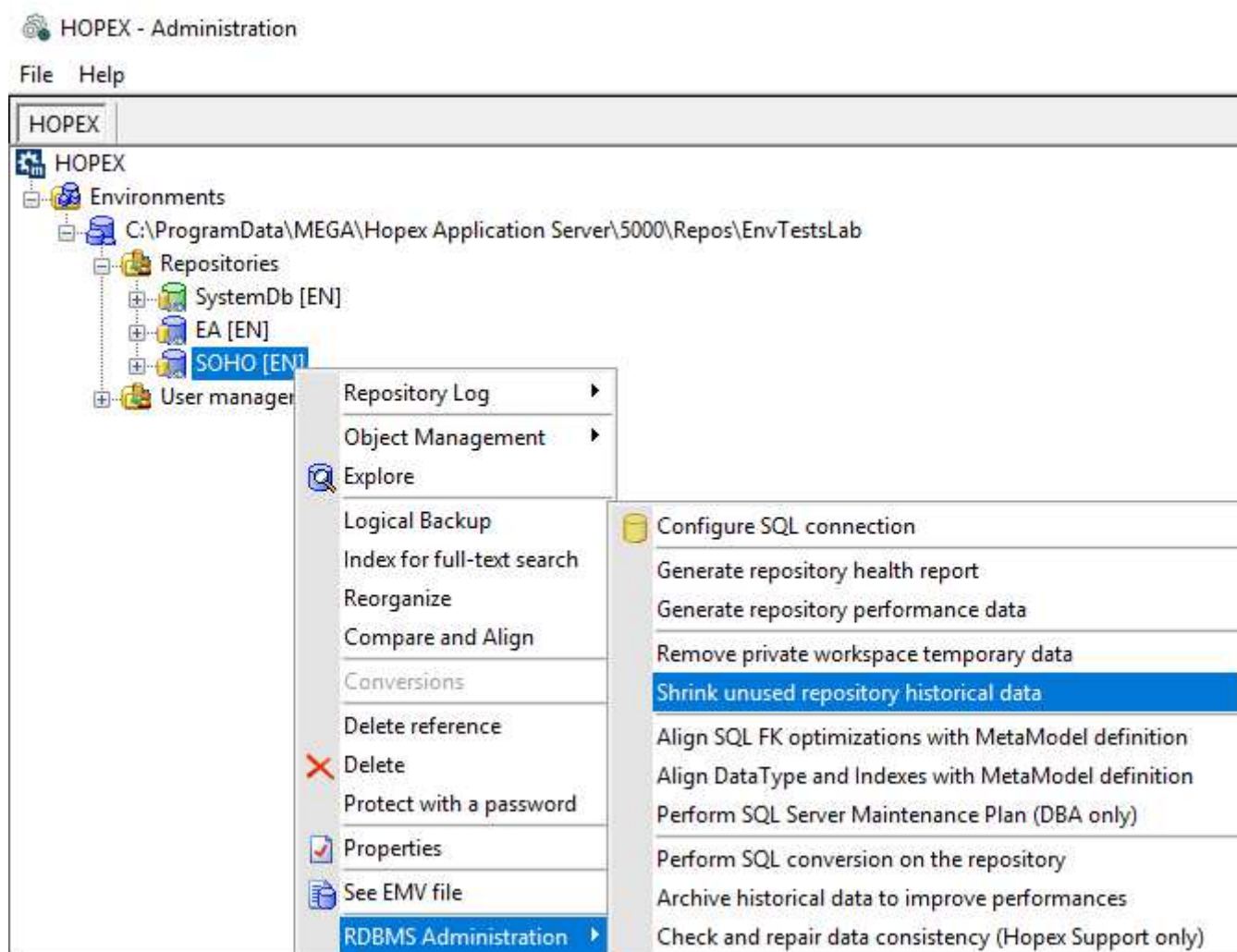
In this case, the data corresponding to the repository state for the Snapshot(s) is saved and it is thanks to this saving that special features will be available within this repository regarding this data.

Installing the procedure

Warning : You must repeat this procedure for each HOPEX Repository and the SystemDb.

1. Right-click your **HOPEX repository** and select **RDBMS Administration > Shrink unused repository historical data**.

This launches SP_CONSOLIDATE_MEGA_DATABASE and if the procedure does not exist, the application creates it. If the procedure already exists, it is overwritten by this action.



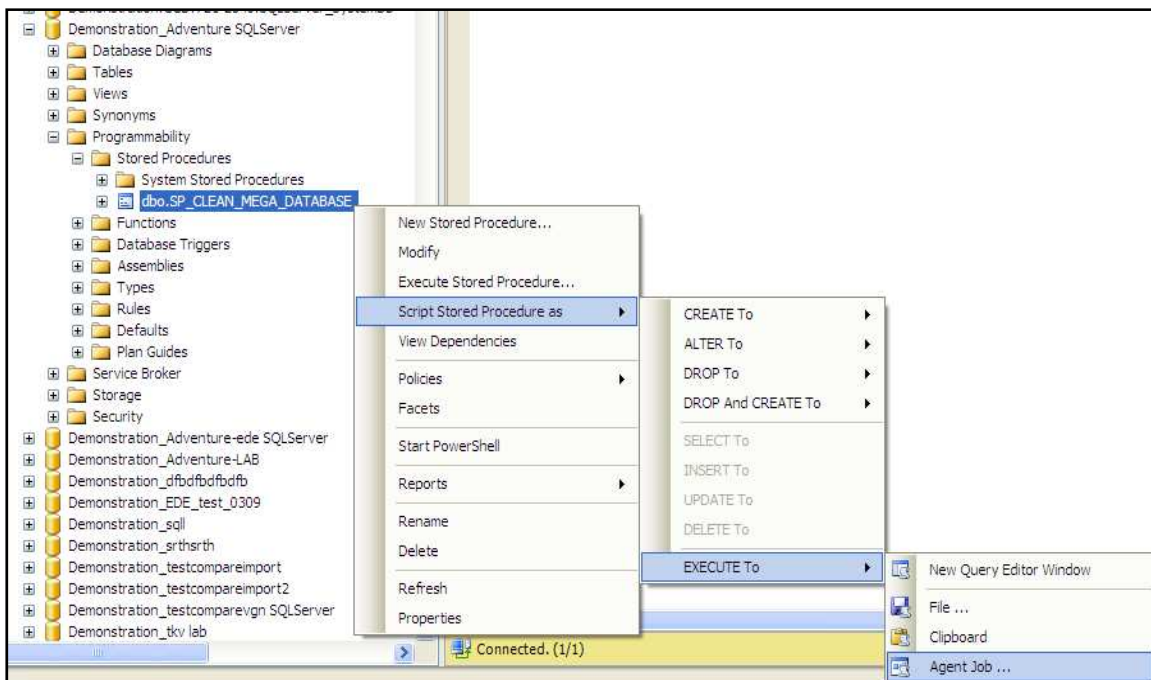
Batching Cleanup procedures for SQL Server

It is very important to run the two procedures on a regular basis. So If you do not want to have to remember to click on the corresponding menus in the Administration.exe program every time that each of the procedure should run, you can batch it using SQL Server agent job.

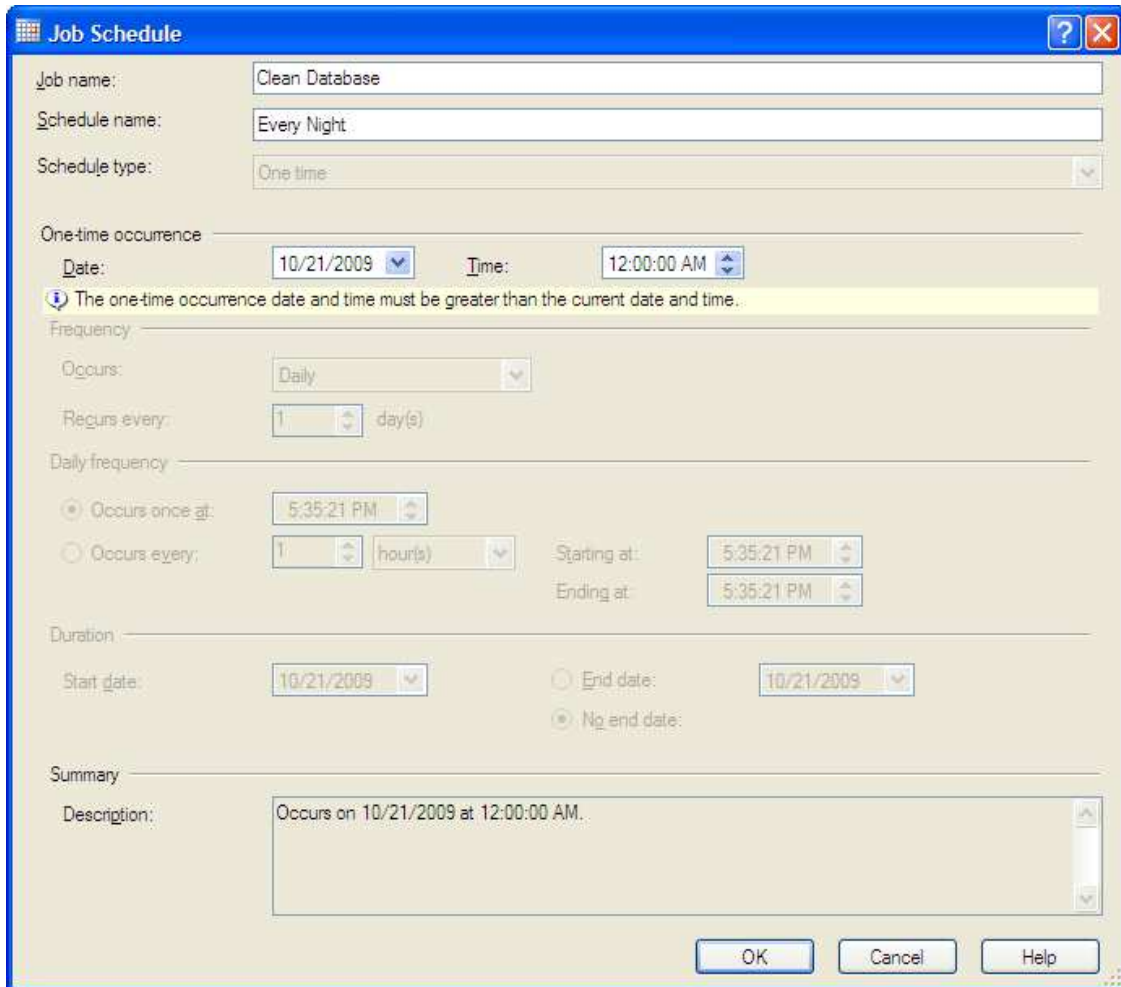
1. Using **SQL Server Management Studio**, find the SQL Server database that corresponds to the HOPEX repository for which you want to batch the stored procedure.

Reminder : the database will be named following this rule <EnvironmentName_RepositoryName>.

2. In **Programmability > Stored Procedures** folder, right-click this procedure and select **Script Stored Procedure as > Execute to > Agent job**.



Enter a name for the job and the schedule.



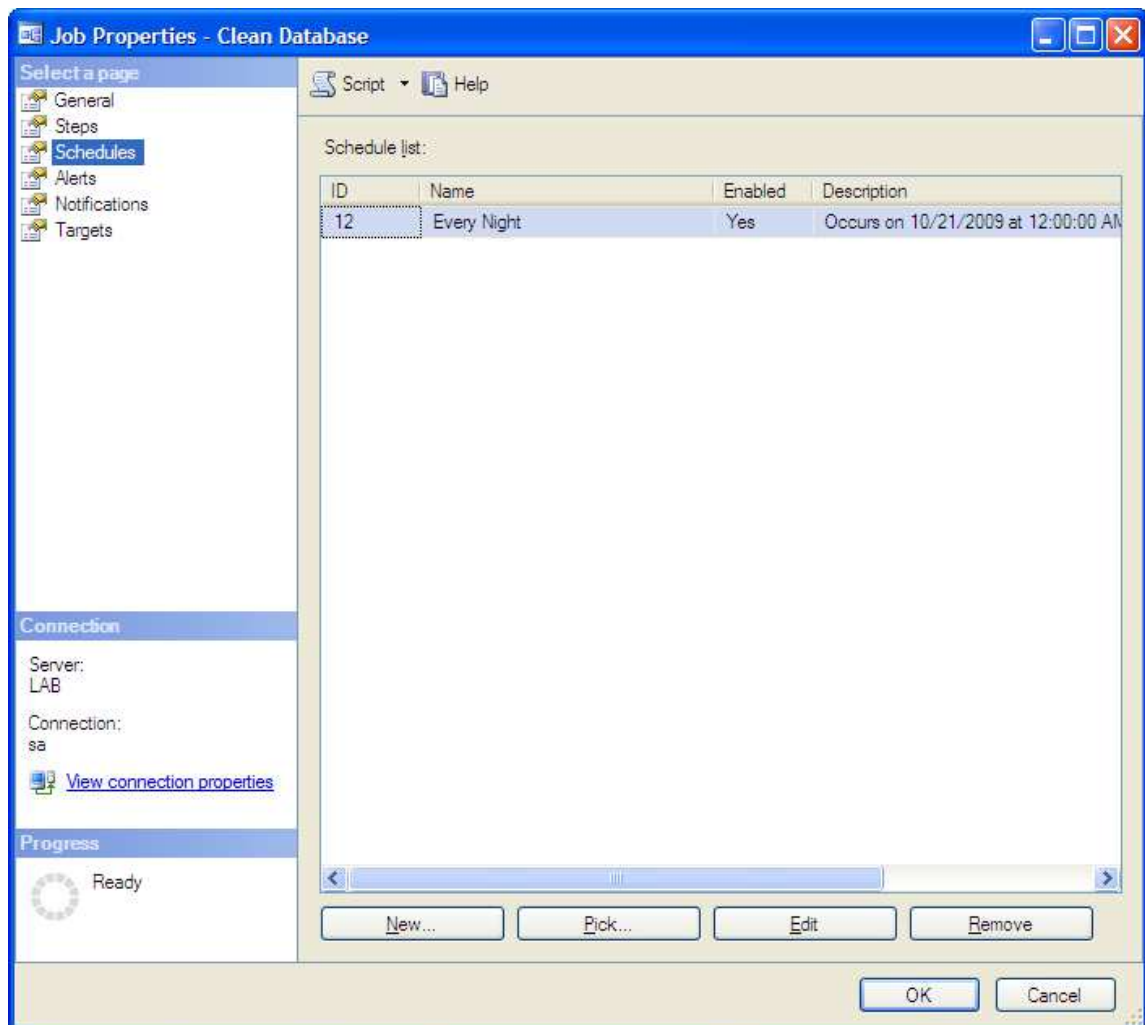
The image shows a 'Job Schedule' dialog box with the following fields and options:

- Job name:** Clean Database
- Schedule name:** Every Night
- Schedule type:** One time
- One-time occurrence:**
 - Date:** 10/21/2009
 - Time:** 12:00:00 AM
 - Message:** The one-time occurrence date and time must be greater than the current date and time.
- Frequency:**
 - Occurs:** Daily
 - Recur every:** 1 day(s)
- Daily frequency:**
 - Occurs once at:** 5:35:21 PM
 - Occurs every:** 1 hour(s)
 - Starting at:** 5:35:21 PM
 - Ending at:** 5:35:21 PM
- Duration:**
 - Start date:** 10/21/2009
 - End date:** 10/21/2009
 - No end date:** (selected)
- Summary:**
 - Description:** Occurs on 10/21/2009 at 12:00:00 AM.

Buttons: OK, Cancel, Help

The job is created.

3. Right-click this job and select **Properties**.
4. Select the **Schedules** tab and click **Edit**.



5. Set up the schedule to execute the job every night.

Job Schedule Properties - Every Night

Name:

Schedule type: ☒ Enabled

One-time occurrence

Date: Time:

Frequency

Occurs:

Repeats every: day(s)

Daily frequency

☒ Occurs once at:

☐ Occurs every: hour(s)

Starting at:

Ending at:

Duration

Start date: ☐ End date:

☒ No end date:

Summary

Description:

Maintenance tasks

The SQL Server databases need to be maintained, in order to keep the best possible performances. Tasks such as "update of the statistics", "reorganize or rebuild of the indexes", "shrink of the databases", as well as backups, need to be run regularly.

We recommend set up the standard maintenance plans of SQL Server to manage those tasks. The backups can be excluded, if they are done through another channel.

Also, we can imagine to put the execution of the HOPEX cleanup procedures (see previous chapter) as the preliminary step to the SQL Server job that will run the maintenance tasks.

You can find below some screenshots of a default maintenance plan (with backups), with SQL Server 2012. It can be adapted to your version, and your rules :

1. Create a maintenance plan using the SQL Server wizard (in SQL Server Management Studio).
2. Give it a name and a schedule (click **Change**).

Maintenance Plan Wizard

Select Plan Properties
How do you want to schedule your maintenance tasks?

Name:

Description:

Run as:

☐ Separate schedules for each task
☒ Single schedule for the entire plan or no schedule

Schedule:

3. Select the following maintenance tasks:

Maintenance Plan Wizard

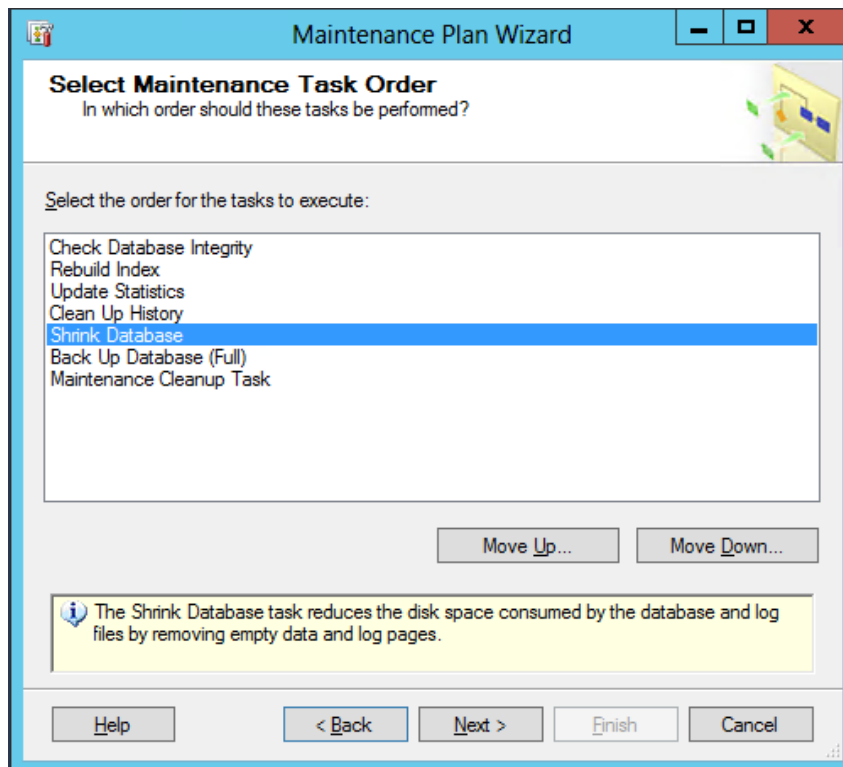
Select Maintenance Tasks
Which tasks should this plan perform?

Select one or more maintenance tasks:

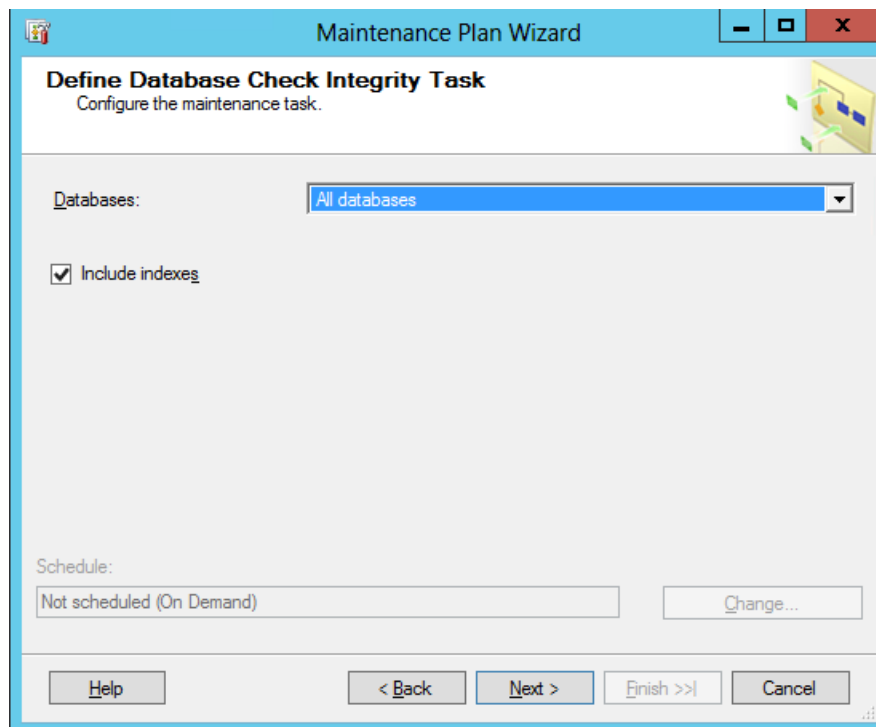
- ☒ Check Database Integrity
- ☒ Shrink Database
- ☐ Reorganize Index
- ☒ Rebuild Index
- ☒ Update Statistics
- ☒ Clean Up History
- ☐ Execute SQL Server Agent Job
- ☒ Back Up Database (Full)
- ☐ Back Up Database (Differential)
- ☐ Back Up Database (Transaction Log)
- ☒ Maintenance Cleanup Task

The Check Database Integrity task performs internal consistency checks of the data and index pages within the database.

4. Order the maintenance tasks as follows:



5. Check all databases (including the system databases):



6. Rebuild indexes for the user databases:

Rebuild Index Task

Connection: Local server connection New...

Database(s): All databases

Object:

Selection:

Free space options

☒ Default free space per page

☐ Change free space per page to: 20 %

Advanced options

☐ Sort results in tempdb ☒ Pad Index

☐ Keep index online ☐ MAXDOP 1

For index types that do not support online index rebuilds

☒ Do not rebuild indexes

☐ Rebuild indexes offline

☐ Low Priority Used

Abort After Wait: None

Max Duration: 0 mins

Index Stats Options

Scan type: ☐ Fast ☐ Sampled ☒ Detailed

Optimize index only if:

☒ Fragmentation > 10 %

☐ Page Count > 1000

☐ Used in last 7.00 days

OK Cancel View T-SQL Help

7. Same thing for the update of the statistics:

The screenshot shows the 'Maintenance Plan Wizard' window, specifically the 'Define Update Statistics Task' step. The window has a blue title bar with the text 'Maintenance Plan Wizard' and standard Windows window controls. Below the title bar, the main area is titled 'Define Update Statistics Task' with the subtitle 'Configure the maintenance task.' and a small icon of a database structure. The configuration options are as follows:

- Databases:** A dropdown menu showing 'All user databases'.
- Object:** An empty dropdown menu.
- Selection:** An empty dropdown menu.
- Update:** Three radio button options:
 - ☒ All existing statistics
 - ☐ Column statistics only
 - ☐ Index statistics only
- Scan type:** Two radio button options:
 - ☒ Full scan
 - ☐ Sample by: A numeric input field containing '50' and a dropdown menu.
- Schedule:** A text box containing 'Not scheduled (On Demand)' and a 'Change...' button.

At the bottom of the window, there are five buttons: 'Help', '< Back', 'Next >', 'Finish >>', and 'Cancel'.

8. Define how long the log files will be kept:

The screenshot shows the 'Define History Cleanup Task' step of the Maintenance Plan Wizard. The title bar reads 'Maintenance Plan Wizard'. The main heading is 'Define History Cleanup Task' with the subtitle 'Configure the maintenance task.' Below this, there is a section 'Select the historical data to delete:' with three checked checkboxes: 'Backup and restore history', 'SQL Server Agent job history', and 'Maintenance plan history'. Underneath is a section 'Remove historical data older than:' with a spinner box set to '2' and a dropdown menu set to 'Week(s)'. At the bottom, there is a 'Schedule:' section with a text box containing 'Not scheduled (On Demand)' and a 'Change...' button. The bottom of the window features a row of buttons: 'Help', '< Back', 'Next >', 'Finish >>', and 'Cancel'.

9. Shrink all user databases, or at least the HOPEX databases:

The screenshot shows the 'Define Shrink Database Task' step of the Maintenance Plan Wizard. The title bar reads 'Maintenance Plan Wizard'. The main heading is 'Define Shrink Database Task' with the subtitle 'Configure the maintenance task.' Below this, there is a 'Databases:' section with a dropdown menu set to 'All user databases'. Underneath, there are two settings: 'Shrink database when it grows beyond:' with a text box set to '50' and 'MB', and 'Amount of free space to remain after shrink:' with a text box set to '10' and a '%' symbol. There are two radio buttons: 'Retain freed space in database files' (unselected) and 'Return freed space to operating system' (selected). At the bottom, there is a 'Schedule:' section with a text box containing 'Not scheduled (On Demand)' and a 'Change...' button. The bottom of the window features a row of buttons: 'Help', '< Back', 'Next >', 'Finish >>', and 'Cancel'.

10. Backup all databases, choose the destination folder, and if you want to have subfolders for each database:

Define Back Up Database (Full) Task

Configure the maintenance task.

Backup type:

Database(s):

Backup component

☒ Database

☐ Files and filegroups:

☐ Copy-only Backup

☐ For availability databases, ignore Replica Priority for Backup and Backup on Primary Settings

☐ Backup set will expire:

☒ After days

☐ On

Back up to: ☒ Disk ☐ Tape

☐ Back up databases across one or more files:

If backup files exist:

☒ Create a backup file for every database

☒ Create a sub-directory for each database

Folder:

Backup file extension:

☐ Verify backup integrity

Set backup compression:

11. Provide the folder where the backups are being stored, the extension, and if you want to include subfolders, as well as how long you want to keep the files before deleting them:

Maintenance Plan Wizard

Define Maintenance Cleanup Task

Configure the maintenance task.

Delete files of the following type:

- ☒ Backup files
- ☐ Maintenance Plan text reports

File location:

- ☐ Delete specific file
- ☒ Search folder and delete files based on an extension

File name:

Folder:

File extension:

☒ Include first-level subfolders

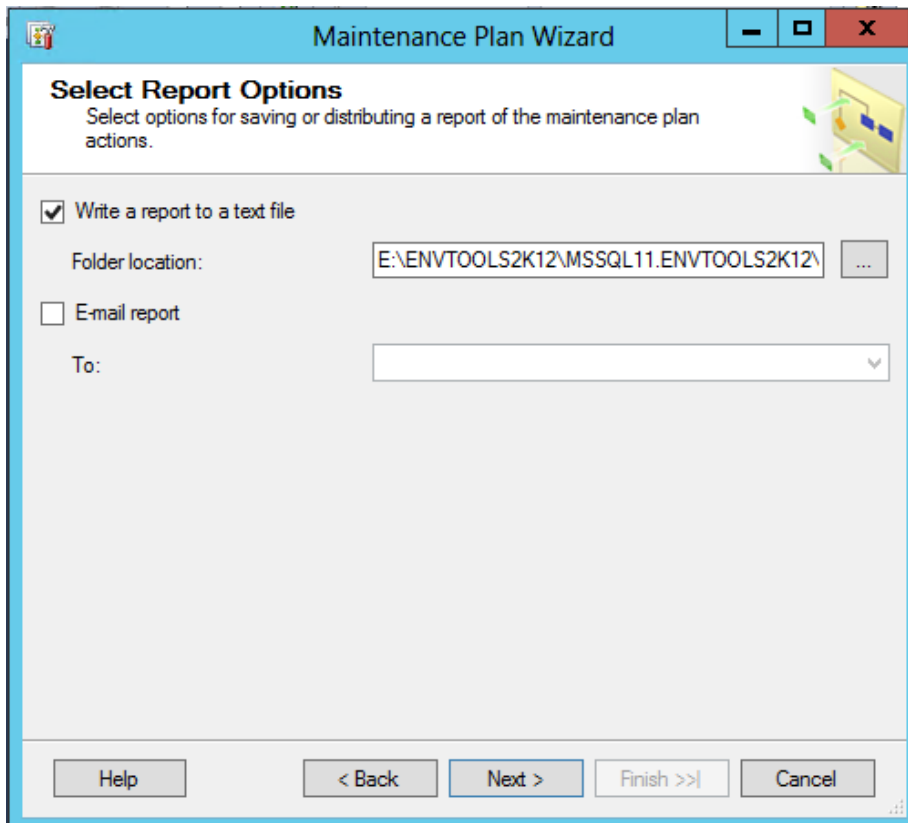
File age:

☒ Delete files based on the age of the file at task run time

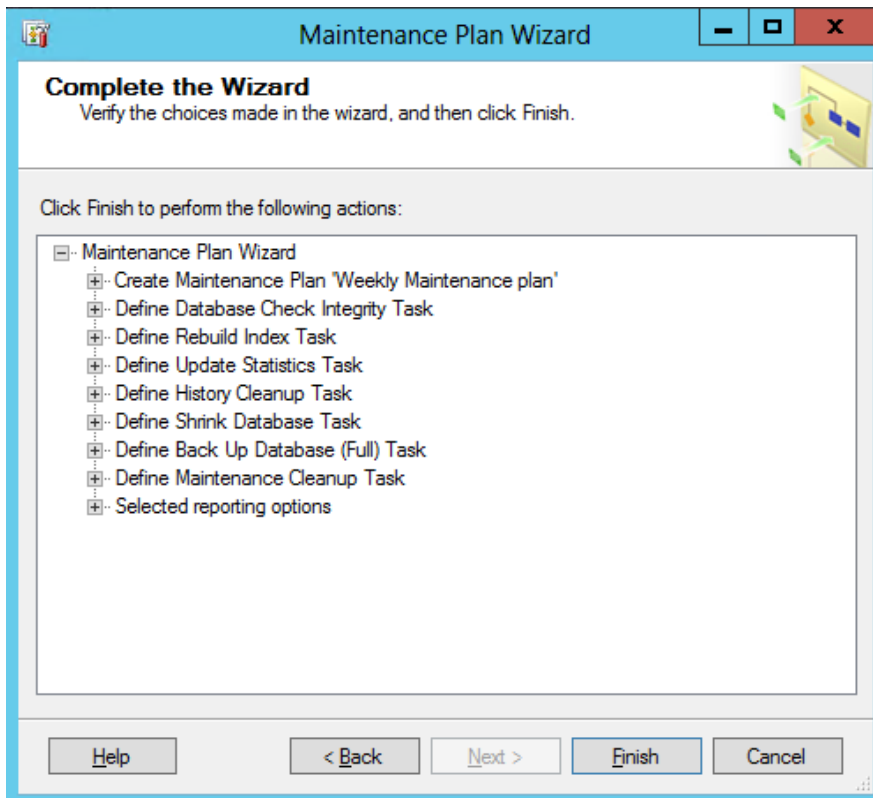
Delete files older than the following:

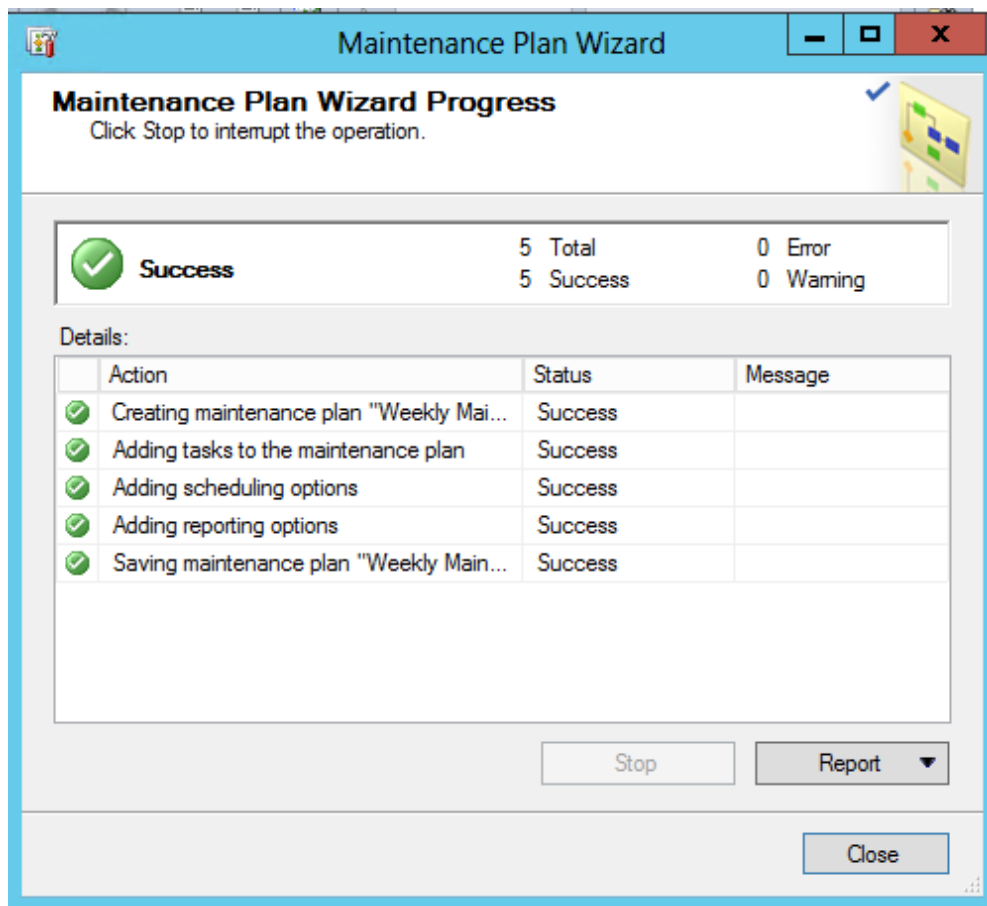
Schedule:

12. Keep the default :



13. Click **Finish** to create the maintenance plan, and the SQL Server job:





HOPEX RDBMS repositories specific administration actions

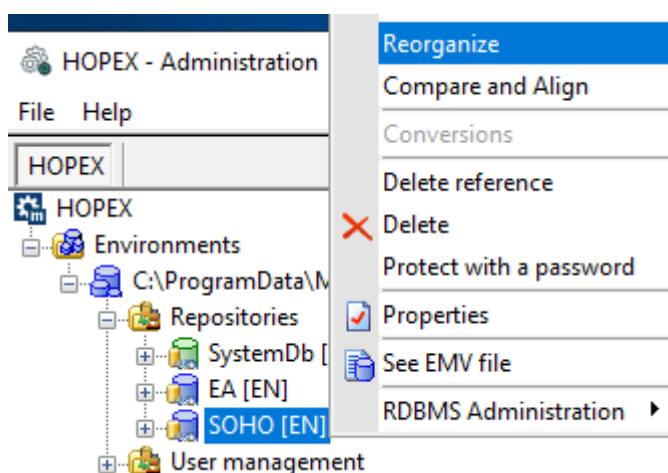
Migrating Your Data from One Storage Support to Another

Previous versions of Hopex were compatible with GBMS (proprietary Mega data format), and Oracle. This section shows how to convert data from one of those to SQL Server.

General procedure:

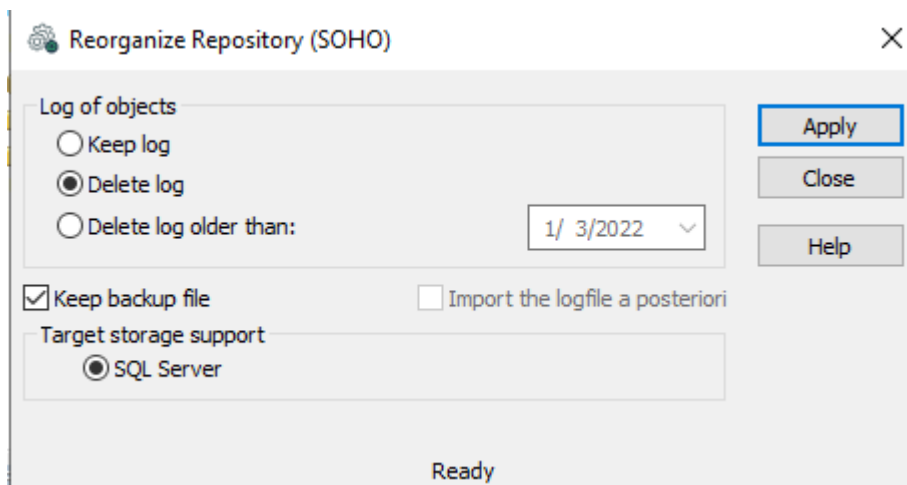
1. Start HOPEX **Administration.exe**.
2. Connect to the environment containing the repositories to be migrated.
3. Expand the **Repositories** folder.
4. Right-click a repository and select **Reorganize**.

NB: Launch a complete environment migration starting with the data repositories and finishing with the SystemDb repository.



To reorganize a repository:

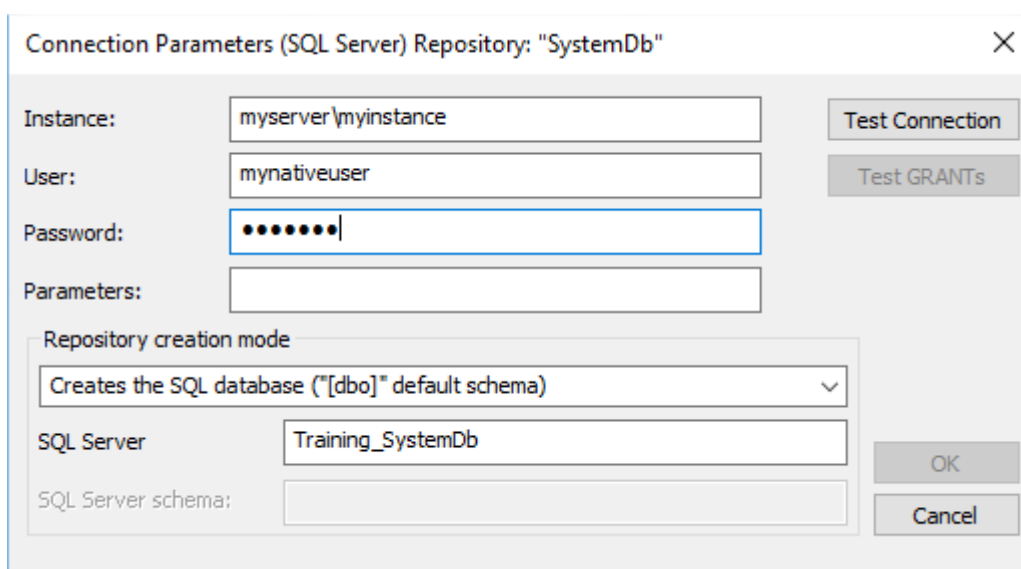
1. Select the expected **Target storage support**.



The 'Reorganize Repository (SOHO)' dialog box is shown. It has a title bar with a close button. The main area contains several options: 'Log of objects' with radio buttons for 'Keep log', 'Delete log' (selected), and 'Delete log older than:' with a date picker set to '1/ 3/2022'. There are 'Apply', 'Close', and 'Help' buttons on the right. Below, there are checkboxes for 'Keep backup file' (checked) and 'Import the logfile a posteriori' (unchecked). The 'Target storage support' section has a radio button for 'SQL Server' (selected). At the bottom, it says 'Ready'.

2. Click **Apply** to start the reorganization.

You are prompted to confirm or change the SQL Connection parameters.



The 'Connection Parameters (SQL Server) Repository: "SystemDb"' dialog box is shown. It has a title bar with a close button. The main area contains fields for 'Instance:' (myserver\myinstance), 'User:' (mynativeuser), 'Password:' (masked with dots), and 'Parameters:'. There are 'Test Connection' and 'Test GRANTS' buttons on the right. Below, there is a 'Repository creation mode' dropdown menu set to 'Creates the SQL database ("dbo" default schema)'. At the bottom, there are fields for 'SQL Server' (Training_SystemDb) and 'SQL Server schema:'. There are 'OK' and 'Cancel' buttons on the right.

The **Test connection** step must be successful for the process to continue.

The **Test GRANTS** step must be successful for the process to continue.

Note: To be successful, there should be no storage on the Sql Server concerning a HOPEX repository with the same name in a same HOPEX environment.

If your Sql Server User does not have the right to create databases, you need to ask your DBA to create an Sql Server database following the naming rule: <EnvironmentName>_<RepositoryName>. You should then choose the option "Use existing Sql Server Database".

Results:

- The database is now migrated to the SQL Server storage.
- The .emq (SQL Server) file corresponding to the newly created repository storage is created.
- The Megaenv.ini file is updated.
- The logical backup file, used during the process, is stored in the 'work' folder of the source repository.
- This backup is named according to the following format: Bkp_Date_BaseName.mgr .

Restoring a HOPEX environment from formatted data

In some cases, in HOPEX Administration, you need to recreate a repository from an existing set of data (a previously HOPEX formatted repository). For example, after a physical corruption (disk crash) of the machine hosting the HOPEX repository folder tree.

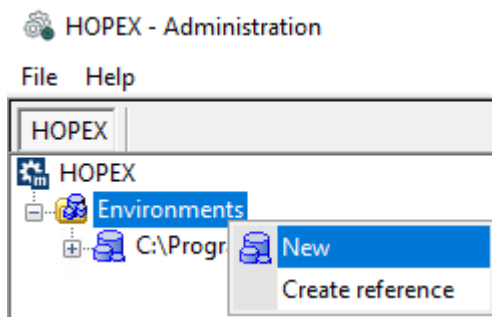
In such a situation, since the repository folder contains files indicating the way to reach the data and on which database server it can be found, the data could be considered lost from a HOPEX point of view.

It is necessary to understand that, from then on, HOPEX needs a new way to access the data inside the RDBMS. This is why this action is seen as a **Restoration** of the data: a re-creation of the repository folder structure allowing to re-save the way to access the data.

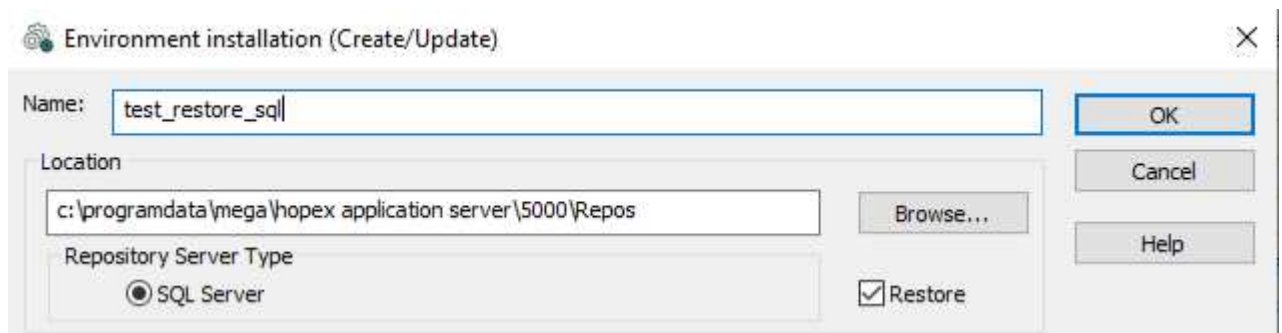
This method can also be used for duplicating an environment from a production infrastructure to a test infrastructure (or vice versa). For doing so, all the repositories (including the SystemDb) must be duplicated first in the RDBMS. The restoration can then be done on the duplicates repositories, starting with the SystemDb.

Restoring an environment (SystemDb repository)

1. Start HOPEX **Administration.exe**.
2. Right-click the **Environments** folder and select **New**.

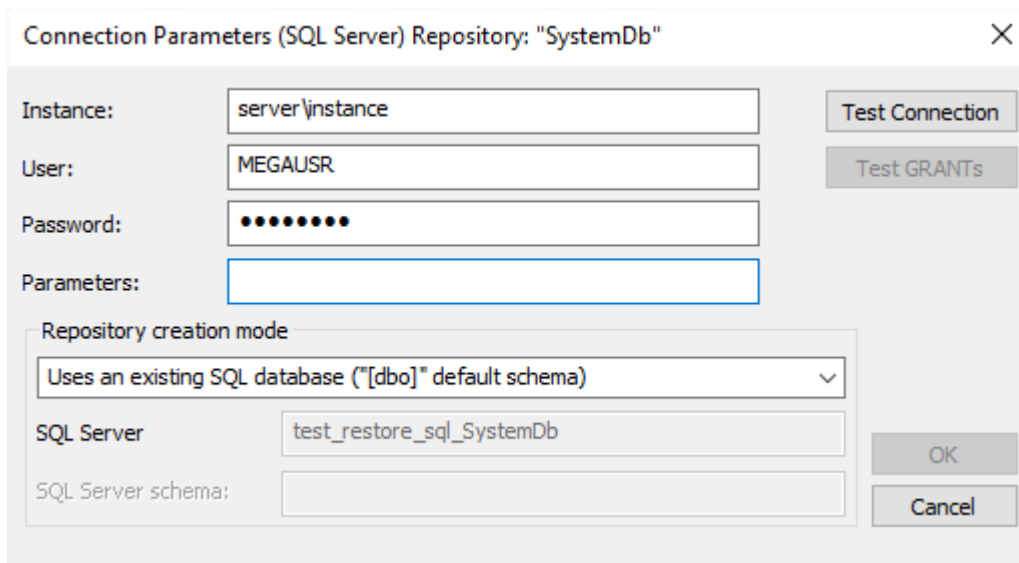


3. In **Name**, enter the name of the environment that is to be restored (the exact same name as the one used for the first creation).
4. Select **Restore**.



5. Click **OK**.

- Specify the connection parameters for accessing the RDBMS where the HOPEX -yet-unreachable data is located.



- Click **Test Connection**.

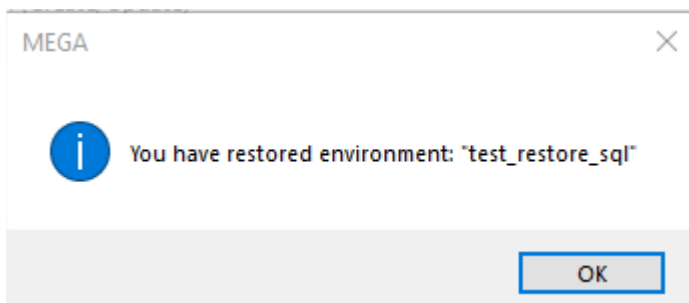
The test must be successful for the process to continue.

- Click **Test GRANTS**.

The test must be successful for the process to continue.

- Click **OK**.

The SystemDb repository is restored.



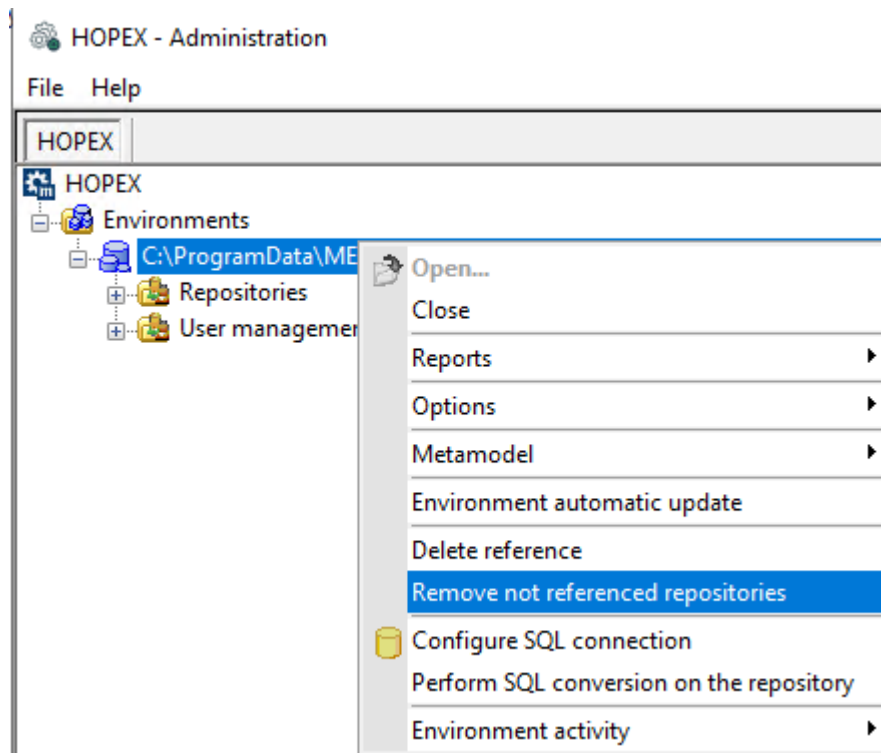
Once these actions are performed successfully, there are a few more actions to perform to be able to restore the repositories that were referenced into the newly restored environment.

At this point, if you open the environment that was just restored, you will see the following warning message: **"The <repository name> is not referenced"**).

The reason is that the environment that was just restored has "a knowledge" of the repositories that should be referenced in it but the references for those repositories do not yet exist in the folder tree structure of the newly restored environment.

To be able to re-reference the required repositories by restoration in this environment, you must first purge that "knowledge":

- Right-click the Environment and select **Remove not referenced repositories**:



Important notes



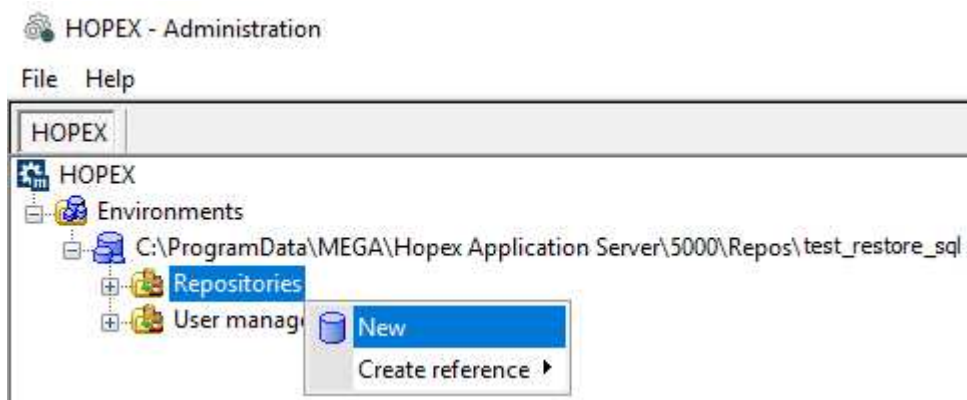
- DO NOT use **Remove not referenced repositories** if the environment is in use somewhere else as it will delete the references to the repositories there too !
- Use it only on an environment that is a physical copy on the RDBMS storage side.
- Be careful that the repositories also must be restored from a physical RDBMS copy (see next chapter for repositories restoration).
- Not taking care of this will lead to situations where users might think that they are using different sets of data when they are actually using and modifying **the same repositories** !

Restoring a data repository

Note: A repository can only be restored within an environment that has the same name as the one in which the repository was originally created. An environment with the same name can be recreated before restoring the repository in it or the actual environment can be restored beforehand.

To restore a data repository:

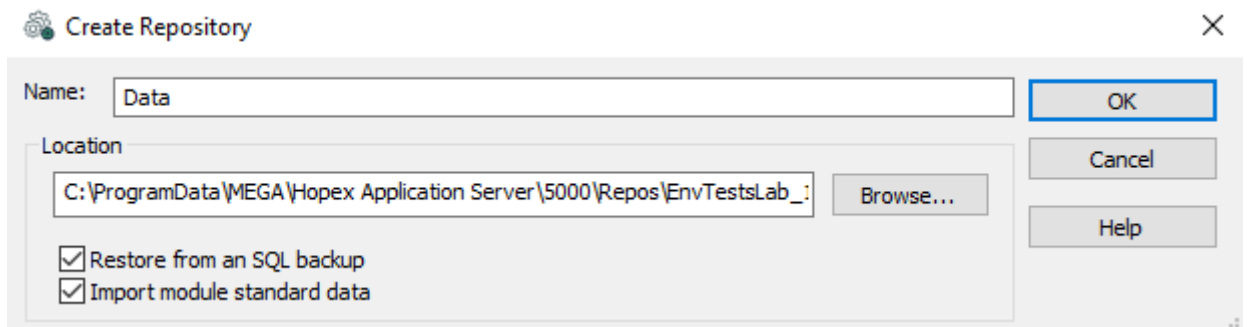
1. Start HOPEX **Administration.exe**.
2. Connect to the environment in which you want to restore the repository.
3. Right-click the **Repositories** folder and select **New**.



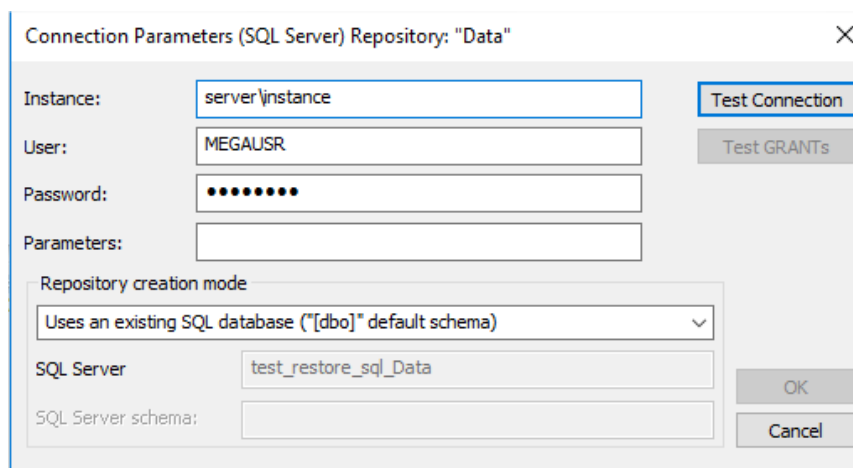
4. In **Name**, enter the name of the repository that is to be restored (the exact same name as the one used for the first creation).
5. Select **Restore from an SQL backup**.
6. Keep the **Import module standard data** option selected.

This option enables to import the .xmg files of the modules already deployed on the HAS instance.

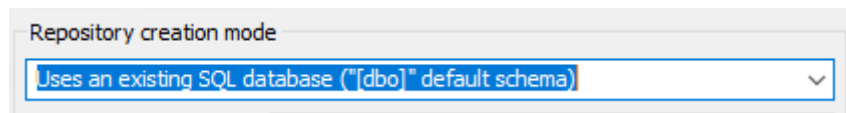
Note: If you restore several repositories, clear the **Import module standard data** option and once all of your repositories are restored launch the **Environment Automatic Update**. Else, keep the option selected for the last repository restoration only.



7. Click **OK**.
8. Specify the connection parameters for accessing the RDBMS where the HOPEX -yet-unreachable data is located.



NB: the “Creation Mode” parameter is disabled (the choice is not possible) when “Restore from an SQL backup” is selected. As in this case, HOPEX is actually told to re-attach to physical data so no database creation or repository initialization will be carried out.



9. Click **Test Connection**.

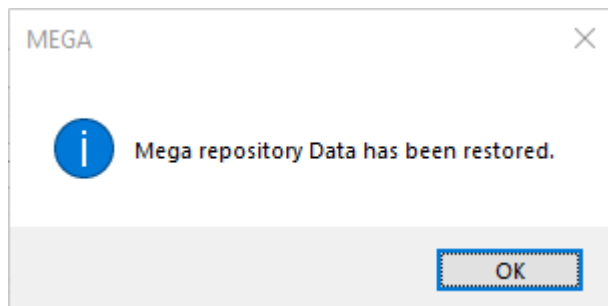
The test must be successful for the process to continue.

10. Click **Test GRANTS**.

The test must be successful for the process to continue.

11. Click **OK**.

The repository is restored.

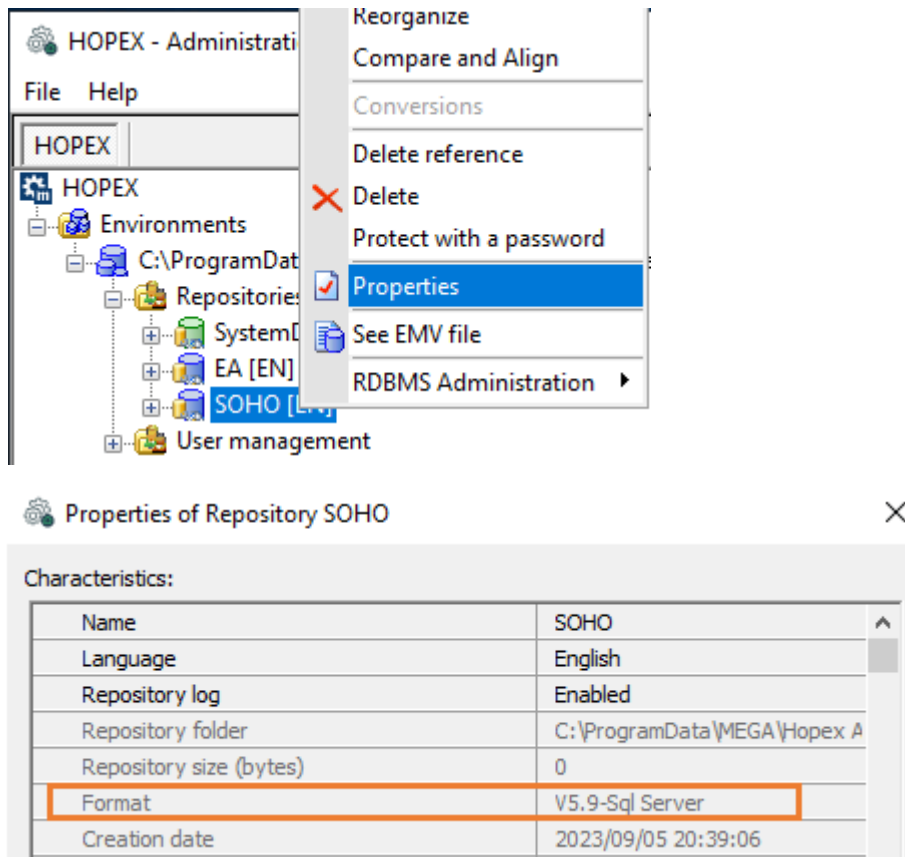


Handling of HOPEX RDBMS repositories specific internal format

There is an internal format used by HOPEX when accessing a repository that is stored on **SQL Server**.

To view this internal format version:

1. Start HOPEX **Administration.exe**.
2. Right-click the HOPEX repository (either SystemDb or data repository) and select **Properties**.

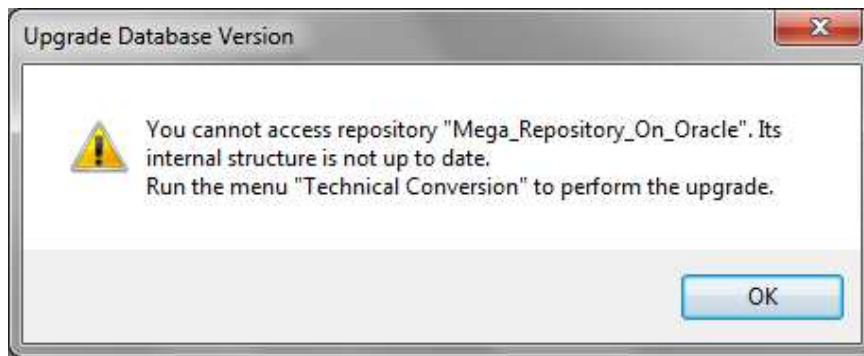


When upgrading your HOPEX installation (applying a Cumulative Patch or migrating your data from a HOPEX SP version to the next one), there might be some modifications leading to a new **internal format** version.

From Mega 2009 SP5, new menus are available to manually activate this **internal format** upgrade.

Note: Before Mega 2009 SP5, the upgrade was made "on the fly" when first accessing the Mega repository with a Mega program corresponding to a more recent **internal format** version.

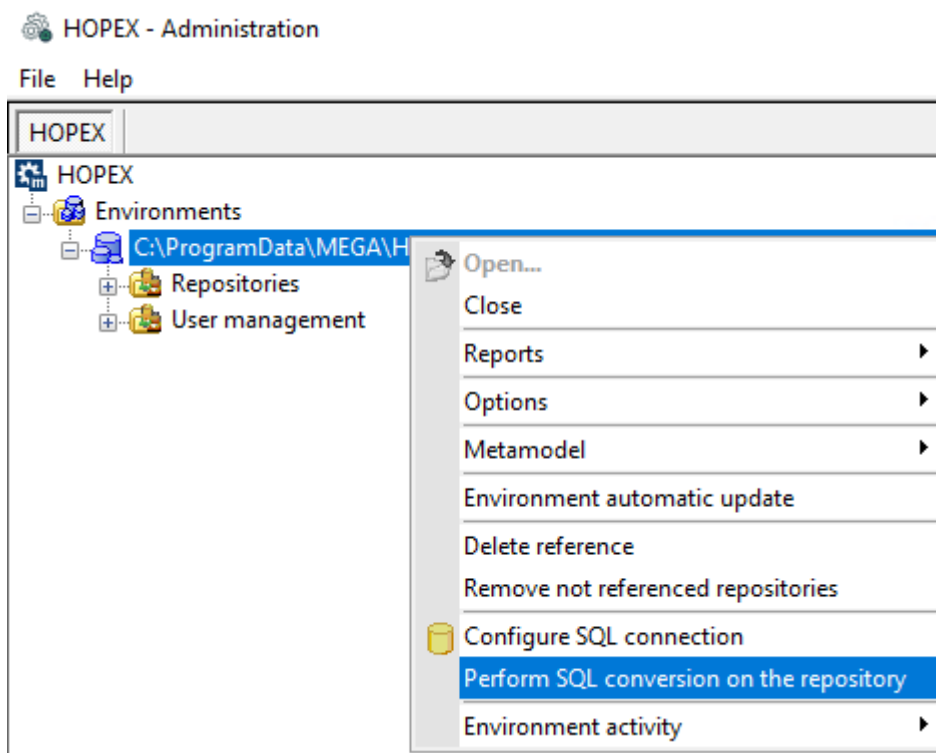
When you need to upgrade the **internal format** version, you are prompted to do it with the following window:



Note: The technical conversion of the repositories of the environment must be done before upgrading to the environment:

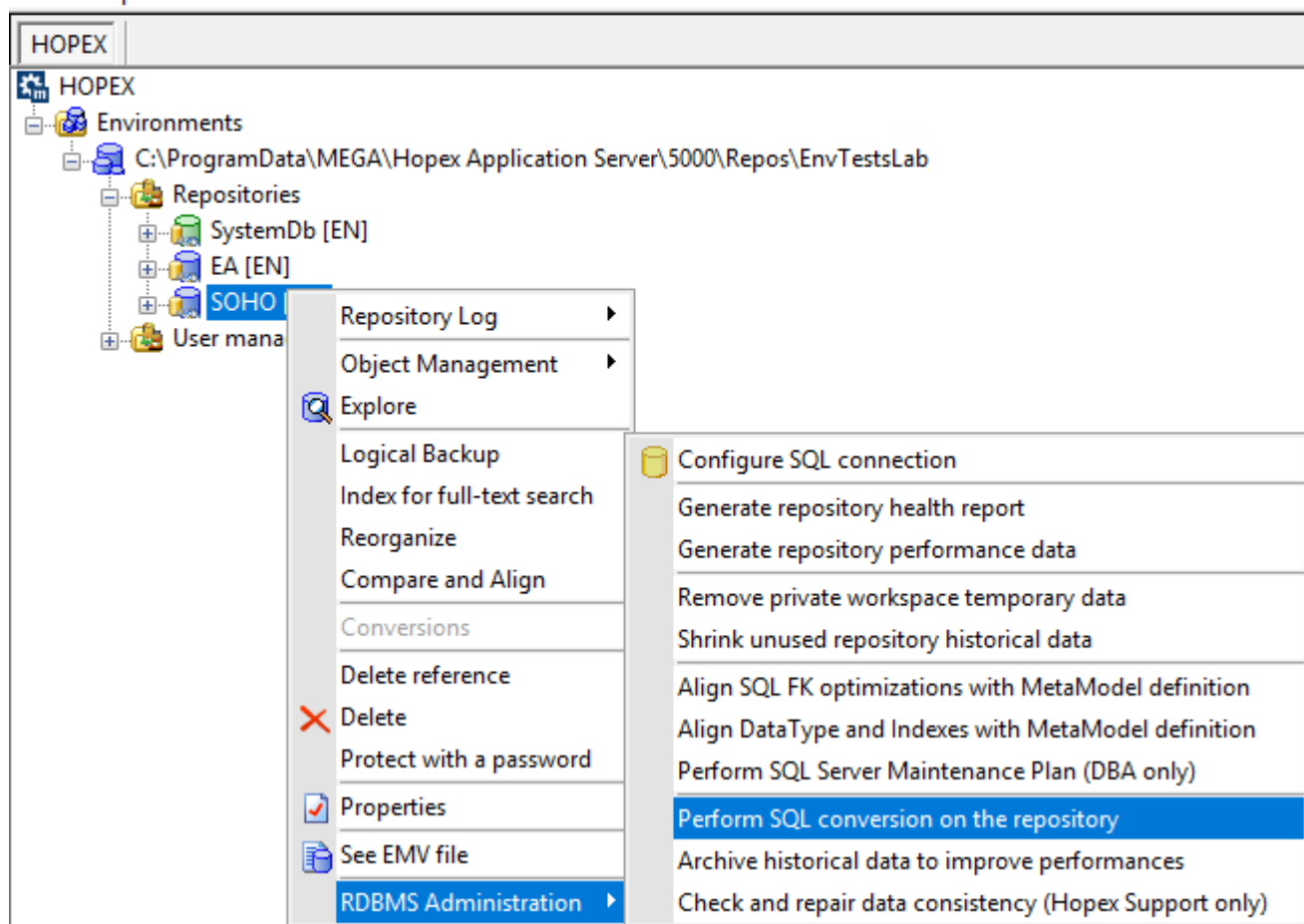
1. Apply the technical conversion on the SystemDb:

Right-click the environment and select **Perform SQL conversion on the repository**.



2. Apply the technical conversion on the other data repositories of the environment:

For each repository, right-click the repository and select **RDBMS Administration > Perform SQL conversion on the repository**.



Vocabulary

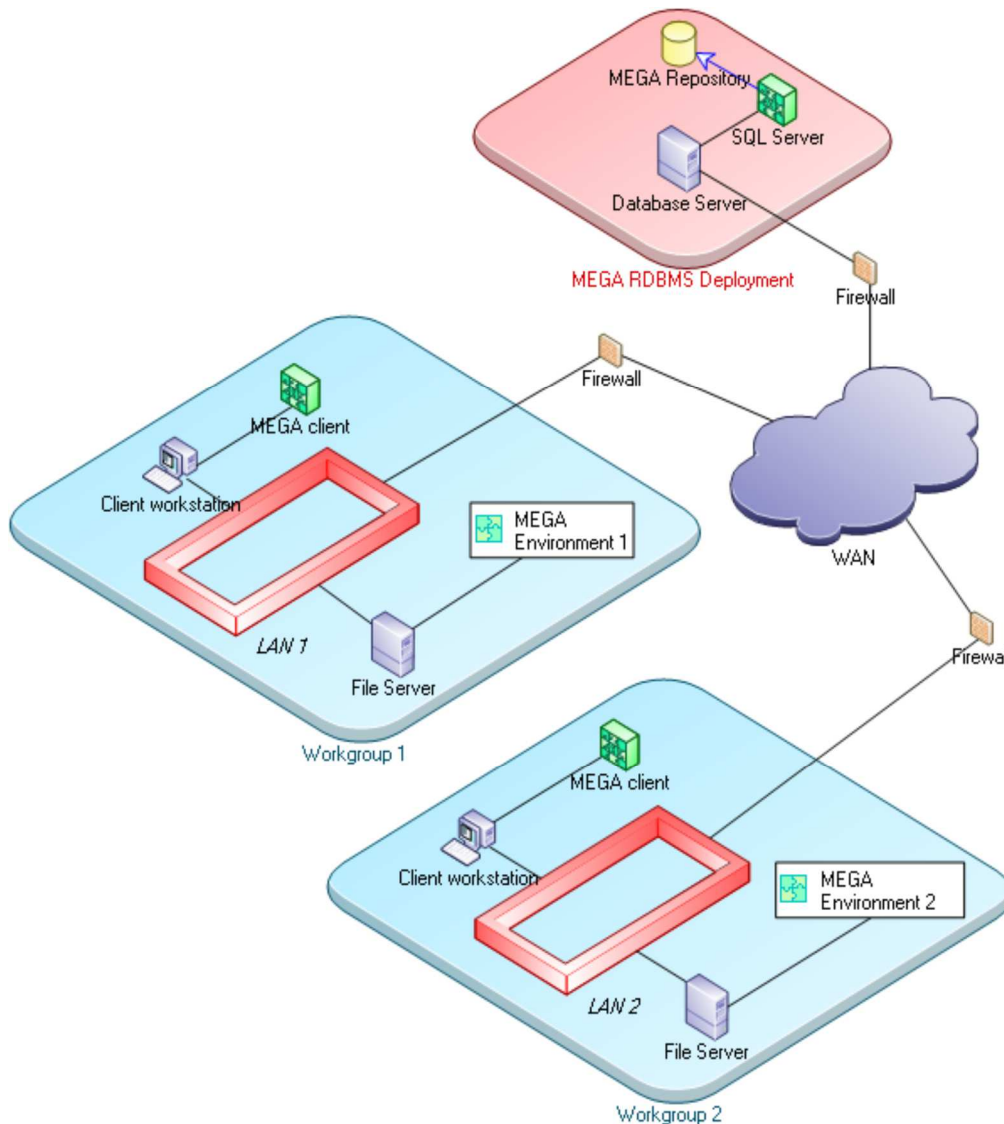
Term	Comment
Database	A database is a collection of data, usually in the form of tables or files, under the control of a database management system (DBMS).
Database server (hardware)	<p>A database server is a machine providing database services to other machines. In this document the database server is a machine running relational database management systems. A database server can host one or several instances.</p> <p>Example:</p> <ul style="list-style-type: none">• Server 'iba.company.com'• Server '192.888.777.666'• Server 'SQL02'
DBA	The DataBase Administrator is responsible for administering, monitoring, and maintaining the database.
DBMS	<p>A DataBase Management System (DBMS) is a set of software programs that controls the organization, storage, management, and retrieval of data in a database.</p> <p>Example: GBMS, Oracle...</p>
GBMS	GBMS is MEGA's historical proprietary DBMS.
HOPEX Environment	On RDBMS installations, an environment is a group of directories where HOPEX generates documents, log files, etc.
RDBMS	<p>Relational DataBase Management System.</p> <p>Examples: Oracle, SQL Server, DB2 Universal Database,...</p>
Repository	<p>A repository is a structured collection of data.</p> <p>A HOPEX repository is a collection of HOPEX data. Data is structured in relation to a metamodel. Object names are often unique within the repository or with a namespace of the repository.</p>
Schema	A schema object is a logical data storage structure.

Term	Comment
	<p>In Oracle, it is a collection of objects (example: tables, views, indexes, procedures, functions...) mapped to an Oracle user. A schema is stored in one/several tablespace objects of the database.</p> <p>It is strongly recommended to isolate each HOPEX Repository in a separate Oracle schema (User Repositories AND SystemDb repository)</p>
Storage format	<p>HOPEX term. It defines the type of DBMS storing HOPEX data.</p> <p>Possible value is SQL Server: storage in SQL Server DBMS.</p>
SystemDb repository	<p>HOPEX Term.</p> <p>It is a HOPEX repository that stores system data, such as, user definition, metamodel definition, template definitions, queries, diagram configuration. This data can be shared by all user repositories within a HOPEX environment. A SystemDb repository is associated to one/several user repositories.</p>
User repository	<p>HOPEX Term.</p> <p>This is a HOPEX repository storing data, such as diagrams, org-units...</p>

Appendix - FAQs

Is it possible to share user repositories and the SystemDb repository through user's workgroups that do not share a file server?

Yes. You can duplicate HOPEX Environment on each side to obtain this kind of configuration.



Is it possible to have a user repository stored on a GBMS and a SystemDb repository stored on a SQL server?

No. Some features might work but it is not tested and not supported. Moreover many specific features will not work.

Is it possible to consult the data from a SQL Server?

It is technically possible and supported (e.g.: SELECT statement). However, this requires knowledge of the HOPEX RDBMS implementation and the HOPEX Metamodel. It is much easier to query the data from within HOPEX.

Is it possible to update the data from an SQL Server?

It is technically possible but **NOT supported** (e.g.: UPDATE or DELETE statement). This requires the knowledge of the HOPEX RDBMS implementation and of the HOPEX Metamodel. Data updates must be performed from within HOPEX. All updates from outside the HOPEX application are made at the customer's risk. Consequences of inappropriate updates will not be supported.

HOPEX Unified Authentication Service

1. Unified Authentication Service Overview	3
2. Configuring UAS Options	5
2.1. Configuring authentication options.....	5
2.2. Identity Provider Option Description	7
2.2.1. HOPEX provider	7
2.2.2. IIS Windows provider	7
2.2.3. SAML2 provider	8
2.2.4. OpenID Connect (OIDC) provider.....	9
3. Configuration Examples	12
3.1. OKTA Configuration with SAML2.....	12
3.1.1. Configuring OKTA application	12
3.1.2. Configuring UAS with OKTA	15
3.2. OKTA Configuration with OpenID Connect.....	16
3.2.1. Configuring OKTA application	16
3.2.2. Configuring UAS with OKTA	19
3.3. Pingfederate Configuration with SAML2	21
3.3.1. Configuring Pingfederate application	21
3.3.2. Configuring UAS with Pingfederate	24
3.4. Pingfederate Configuration with OpenID Connect	26
3.4.1. Configuring Pingfederate application with OpenID Connect	26
3.4.2. Configuring UAS with Pingfederate	30
3.5. Azure AD Configuration with SAML2.....	31
3.5.1. Configuring Azure AD application.....	31
3.5.2. Configuring UAS with Azure AD.....	33
4. Terminology	35
4.1. Client	35
4.2. User	35
4.3. Scope	35
4.3.1. Identity scopes.....	35
4.3.2. Resource scopes.....	35
4.4. Authentication/Token Request	35
4.4.1. Identity Token.....	35
4.4.2. Access Token	35

1. Unified Authentication Service Overview

Unified Authentication Service (UAS) is HOPEX web-based authentication system. UAS is a centralized service, which enables to manage several authentication types:

- External authentication or Single Sign-On (SSO)

SSO is an authentication system enabling users to login with a single ID and password to access HOPEX and any other Customer application types like web or mobile, access control for APIs, and federation (support for external identity providers like Google and enterprise identity management systems via SAML2).

UAS manages two standard authentication protocols:

- **SAML2**

Security Assertion Markup Language 2.0 (SAML 2.0) is a version of the SAML standard for exchanging authentication and authorization data between security domains.

SAML 2.0 is an XML-based protocol that uses security tokens containing assertions to pass information about a principal (usually an end-user) between a SAML authority (Identity Provider), and a SAML consumer (Service Provider).

SAML2 Specifications: <https://tools.ietf.org/html/rfc7522>

- **Open ID Connect**

OpenID Connect (OIDC) enables to implement a centralized identity federation and respond to SSO issues.

OIDC specifies an HTTP Restful authentication interface and relies on the OAuth2 protocol to do delegation authorization, i.e. in most of the cases, the end user no longer needs to directly provide credentials to a third-party application. OIDC also uses the JSON Web Token (JWT) exchange formalism to convey user identities to applications, as well as their roles / entitlements.

Open ID Specifications: <http://openid.net/connect/>

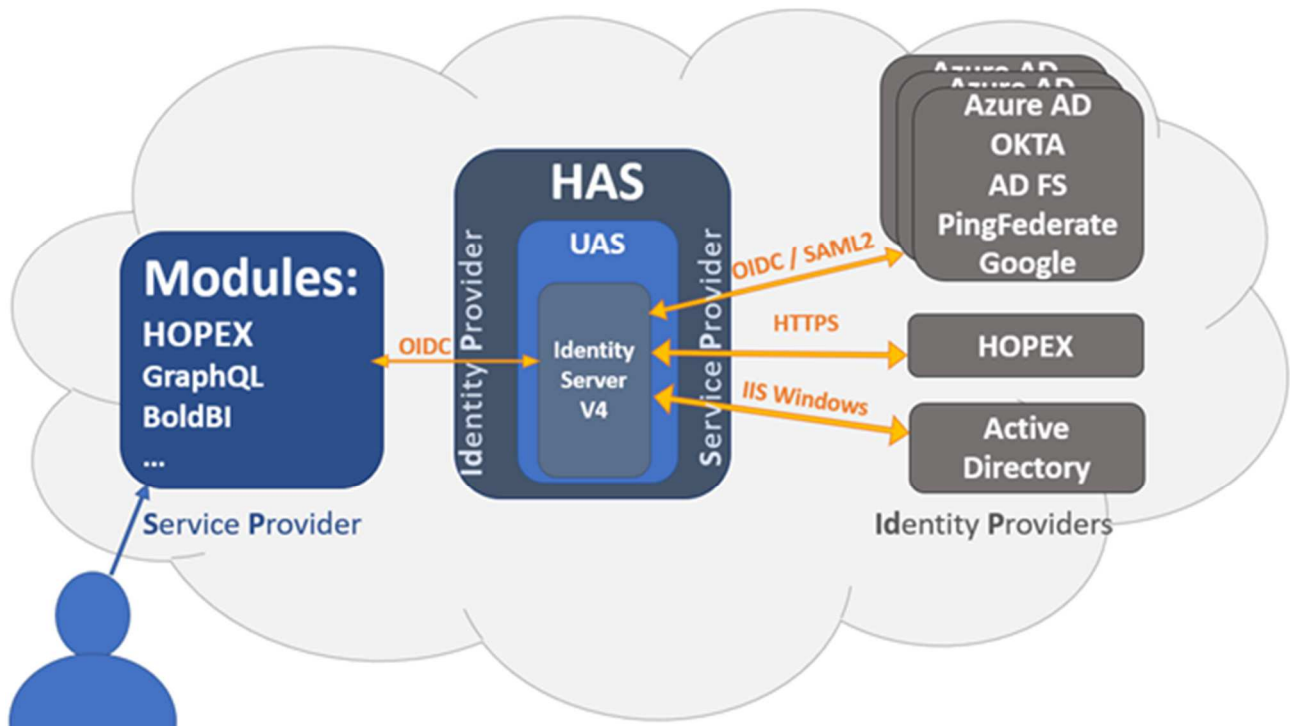
These protocols are supported by some Identity Providers (IDPs) like Azure AD, AD FS, OKTA, Google.

- Authentication through HOPEX platform

If you do not have any external authentication module, you can use HOPEX platform to manage user authentication (LDAP, HOPEX, or Windows).

➔ See *HOPEX Administration (Web)* documentation for information regarding authentication through HOPEX platform.

If needed, you can define several providers of OpenID and/or SAML2 types.



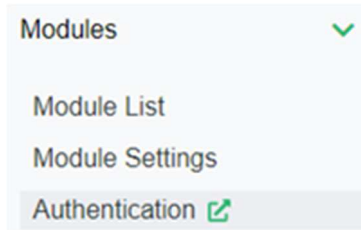
2. Configuring UAS Options

2.1. Configuring authentication options

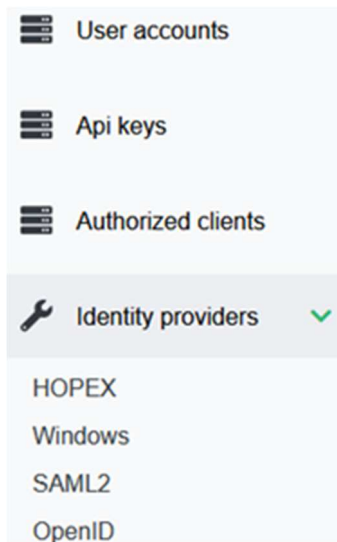
UAS options are configured in HAS console.

To configure authentication options:

- 1) Connect to **HAS** console.
- 2) Access the **Authentication** module.
 - a. In the left pane, expand **Modules**.
- 3) In UAS Administration, click the **Identity providers** section.



- b. Click Authentication.



- 4) Select the Identity provider you want to configure.
- 5) Click **Create**.
- 6) To activate this Identity Provider, select **Active**.
- 7) You can configure as many Identity providers as you want.

➤ See

- Identity Provider Option Description.

2.2. Identity Provider Option Description

The identity provider options are the following:

- **HOPEX**, see [HOPEX provider](#) section
- **IIS Windows**, see [IIS Windows provider](#) section
- **SAML2**, see [SAML2 provider](#) section
- **Open ID Connect**, see [OpenID Connect \(OIDC\) provider](#) section

2.2.1. HOPEX provider

The HOPEX provider is the HOPEX default provider, which displays a login page with username and password.

To authenticate HOPEX users, use HOPEX User Native Authentication.

➔ See *HOPEX Administration* documentation: “Authentication in HOPEX” section.

(Note: LDAP Authentication is still available but now deprecated).

2.2.2. IIS Windows provider

With the IIS Windows provider HOPEX users are authenticated by Windows Authentication.

To configure IIS Windows provider, define the following parameters:

- **Display Name**
Defines the name of the button displayed on the login page for IIS Windows Identity provider.
Default value: “Windows”
- **Windows Roles**
As some logins belong to several (hundreds) groups you might need to filter HOPEX related groups. If you do not filter the groups, you might get http 400 errors, due to the size of cookies generated from the claims retrieved.
- **ClaimForRoles**
Enter the name of the claim used for the role.
- **Windows Source Identifier**
You can define the property used to identify the connection.
 - **Standard (by default)**
 - **sAMAccountName**
 - **EmployeeId**
- **Authentication schemes**
If IIS and HAS:
 - are on the same machine, keep the default settings (**Negotiate** and **Basic** selected)
 - are not on the same machine (e.g.: in a cluster mode) you must clear **Negotiate**.

Authentication schemes

Negotiate ☐

Basic ☒

2.2.3. SAML2 provider

SAML 2.0 is an XML based framework, used to describe and exchange security information. It can be used for Single Sign On (SSO), Identity Management and Federation.

To use SAML2 provider, you must set UAS in SSL Mode.

UAS manages only Service Provider (SP) initiated SSO and not Identity Provider (IDP) initiated SSO.

For examples regarding SAML2 Identity Provider implementation see:

- [OKTA Configuration with SAML2](#)
- [Pingfederate Configuration with SAML2](#)
- [Azure AD Configuration with SAML2](#)

To configure SAML2 Identity provider, define the following parameters:

In the **General** tab:

- **Display Name**
Defines the name of the button displayed on the login page for SAML2 Identity provider.
- **Entity Identifier (Entity Id)**
Entity Identifier is the identity of the Service Provider to use when sending requests to the Identity Provider and presenting the Service Provider in metadata.
- **Metadata location**
Location of the metadata for the Identity Provider. Automatically enabled.
The location can be a URL, an absolute path to a local file, or an app relative path (e.g.: ~/App_Data/IdpMetadata.xml). By default, the Entity Id is interpreted as the metadata location (this is a convention).
- **Groups Authorized**
As some logins belong to several (hundreds) groups you might need to filter HOPEX related groups. If you do not filter the groups, you might get http 400 errors, due to the size of cookies generated from the claims retrieved.
- **ClaimForRoles**
Enter the name of the claim used for the role.
- **ClaimForSub**
Enter the name of the claim used for the sub.
- **ModulePath**
Application root relative path for SAML2 Assertion Consumer EndPoint.
By default: "AuthServices".
It is used in the calculation of the url.
In case several SAML2 are configured, they must have a distinct ModulePath value.

In the **Certificate and signature** tab:

- **Certificate friendly name**
Certificate used by the service provider for signing or decryption.
- **Want assertion signed**

Select this option if you want the assertions to be signed.

- **Want AuthnRequests signed**

Select this option if you want this Identity Provider to get the AuthRequests signed.

- **Authenticate Request Signing Behavior**

You can modify the authenticate request signing behavior:

- **“IfIdpWantAuthnRequestsSigned” (by default):** signs AuthnRequests if the Identity Provider is configured for it.
- **“always”:** always signs AuthnRequests. AuthnRequestsSigned is set to true in metadata.
- **“never”:** never signs AuthnRequests.

- **Certificate use**

Allows to sign and/or encrypt SAML2 assertions.

You can modify the certificate use:

- **Both (by default)**
- **Signing**
- **Encryption**

In the **Organization** tab:

- **Name / Email / Url**

Enter the information (name, email, URL) describing the organization responsible for the entity.

In the **Contact** tab:

- **Email**

Enter the collection of contacts for the SAML2 entity.

2.2.4. OpenID Connect (OIDC) provider

Use the OpenID Connect (OIDC) provider to authenticate HOPEX users with an OpenID Connect account by OAUTH2.

For examples regarding OpenID Connect Identity Provider implementation see:

- [OKTA Configuration with OpenID Connect](#)
- [Pingfederate Configuration with OpenID Connect](#)

Prerequisite: authentication is performed using the Authorization Code Flow (response_type=code) only.

All tokens are returned from the Token Endpoint

(source: https://openid.net/specs/openid-connect-core-1_0.html#toc).

The Authorization Code Flow returns an Authorization Code to the Client, which can then exchange it for an ID Token and an Access Token directly. This provides the benefit of not exposing any tokens to the User Agent and possibly other malicious applications with access to the User Agent.

The Authorization Server can also authenticate the Client before exchanging the Authorization Code for an Access Token.

The Authorization Code flow is suitable for Clients that can securely maintain a Client Secret between themselves and the Authorization Server.

The Authorization Code Flow goes through the following steps:

1. Client prepares an Authentication Request containing the desired request parameters.
2. Client sends the request to the Authorization Server.
3. Authorization Server Authenticates the End-User.
4. Authorization Server obtains End-User Consent/Authorization.
5. Authorization Server sends the End-User back to the Client with an Authorization Code.
6. Client requests a response using the Authorization Code at the Token Endpoint.
7. Client receives a response that contains an ID Token and Access Token in the response body.
8. Client validates the ID token and retrieves the End-User's Subject Identifier.

To configure OpenID Connect provider, define the following parameters:

- **Display Name**

Defines the name of the button displayed on the login page for OpenID Connect Identity provider.

This name is also used in the calculation of the RedirectURL (specific to OpenID Connect protocol), which is also displayed on the login page.

- **Authority server url**

This URL defines the OpenID server location.

- **Proxy Url**

If the proxy is configured on the same server as UAS, this url defines the output url for the protocol to reach its endpoints (e.g.: DiscoveryEndPoint and TokenEndPoint).

- **Client Identifier**

Is the identifier of your application.

- **Secret client**

You can use either:

- the Secret > Client Secret (less secure), or
- a **Certificate** defined by a **Thumbprint** and an **Audience**, which is the Token EndPoint url of your IdentityServer, so as to read the Access Token via this certificate.

- **Scopes**

Each OpenID server must support the OpenId scope that provides the JWT (JSON Web Token) claims (<https://datatracker.ietf.org/doc/html/rfc7519>).

In addition, OpenID server can support other scopes like email.profile from which other claims are provided.

- **ClaimForRoles**

Enter the name of the claim used for the role.

- **ClaimForSub**

Enter the name of the claim used for the sub.

- **MetadataAddress server url**

The **DiscoveryEndPoint** url provides the metadata of the OpenID Connect identity provider. It provides information like endpoint token and scopes.

Usually, you do not need to enter this URL as it comes from the Authority Server URL. It should be:

```
[Authority Server url]/.well-known/openid-configuration
```

- **Groups Authorized**

As some logins belong to several (hundreds) groups you might need to filter HOPEX related groups. If you do not filter the groups, you might get http 400 errors, due to the size of cookies generated from the claims retrieved.

3. Configuration Examples

3.1. OKTA Configuration with SAML2

3.1.1. Configuring OKTA application

To configure OKTA application:

- 1) Connect to your OKTA account.
- 2) Go to **Admin Portal > Applications**: create an application.
- 3) Select **SAML2** sign-in method.

Create a new app integration ×

Sign-in method

[Learn More](#) 

- ☐ **OIDC - OpenID Connect**
Token-based OAuth 2.0 authentication for Single Sign-On (SSO) through API endpoints. Recommended if you intend to build a custom app integration with the Okta Sign-In Widget.
- ☒ **SAML 2.0**
XML-based open standard for SSO. Use if the Identity Provider for your application only supports SAML.
- ☐ **SWA - Secure Web Authentication**
Okta-specific SSO method. Use if your application doesn't support OIDC or SAML.
- ☐ **API Services**
Interact with Okta APIs using the scoped OAuth 2.0 access tokens for machine-to-machine authentication.

[Cancel](#)

[Next](#)

- 4) Click **Next**.
- 5) In **General Settings**:
 - Enter the **App name**.
Example: Hopex

Create SAML Integration

1 General Settings

2 Configure SAML


3 Feedback



1 General Settings

App name

Hopex

App logo (optional) ⓘ



App visibility

☐ Do not display application icon to users

☐ Do not display application icon in the Okta Mobile app

Cancel

Next

6) Click **Next**.

7) In **Configure SAML**:

- Enter **Single Sign on URL** with the following URL syntax:
<https://<server name>/UAS/AuthServices/Acs>
- Enter **Audience URI** with the following URL syntax:
<https://<server name>/UAS>

Create SAML Integration

1 General Settings

2 Configure SAML

3 Feedback

A SAML Settings

General

Single sign on URL ⓘ

https://[redacted].mega.com/UAS/AuthServices/Acs

☒ Use this for Recipient URL and Destination URL

☐ Allow this app to request other SSO URLs

Audience URI (SP Entity ID) ⓘ

https://[redacted].mega.com/UAS

Default RelayState ⓘ

If no value is set, a blank RelayState is sent

Name ID format ⓘ

EmailAddress

Application username ⓘ

Email

Update application username on

Create and update

Show Advanced Settings

What does this form do?

This form generates the XML needed for the app's SAML request.

Where do I find the info this form needs?

The app you're trying to integrate with should have its own documentation on using SAML. You'll need to find that doc, and it should outline what information you need to specify in this form.

Okta Certificate

Import the Okta certificate to your Identity Provider if required.

[Download Okta Certificate](#)

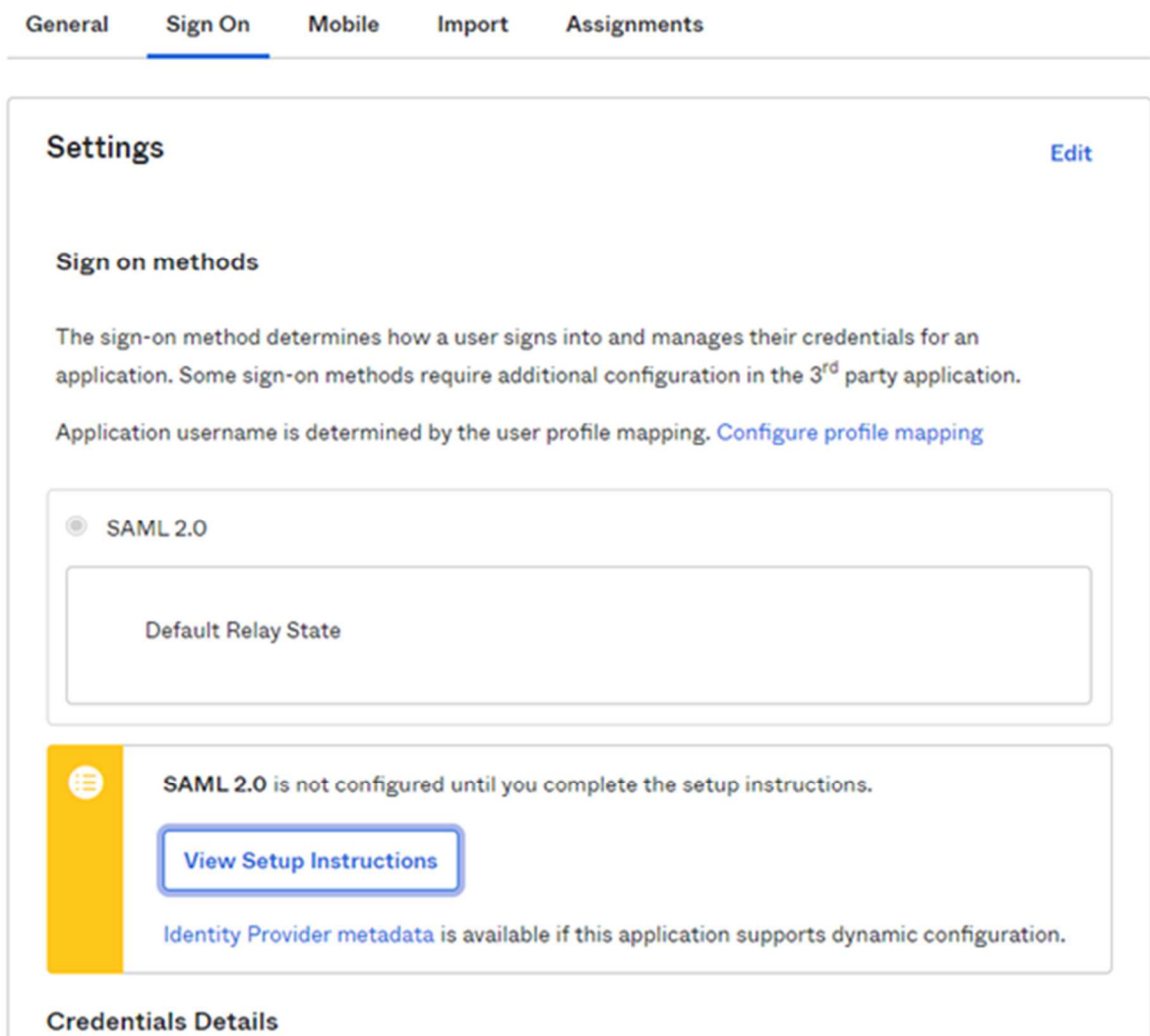
- In **Attribute Statements**, add an attribute:

- **Name:** "sub"
- **Value:** user.email.

8) Click **Finish**.

At the end of the App creation, from the **View Setup Instructions**, write down the following information carefully as you will need it for the UAS configuration:

- **Identity Provider Issuer**
- **Identity Provider metadata**



General **Sign On** Mobile Import Assignments

Settings Edit

Sign on methods

The sign-on method determines how a user signs into and manages their credentials for an application. Some sign-on methods require additional configuration in the 3rd party application.

Application username is determined by the user profile mapping. [Configure profile mapping](#)

☒ SAML 2.0

Default Relay State

SAML 2.0 is not configured until you complete the setup instructions.

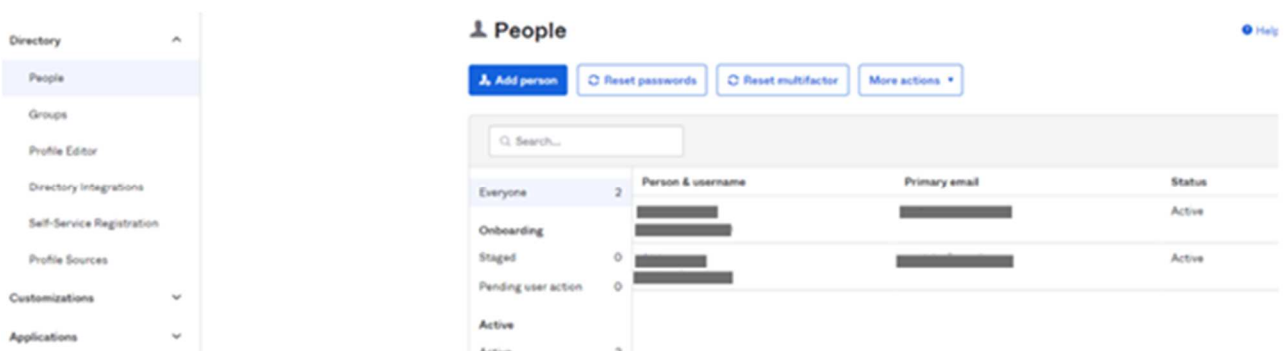
[View Setup Instructions](#)

Identity Provider metadata is available if this application supports dynamic configuration.

Credentials Details

9) Create users that are allowed to connect to HOPEX with OKTA \ SAML2 authentication:

- a. In **Directory > People**: click **Add person**.



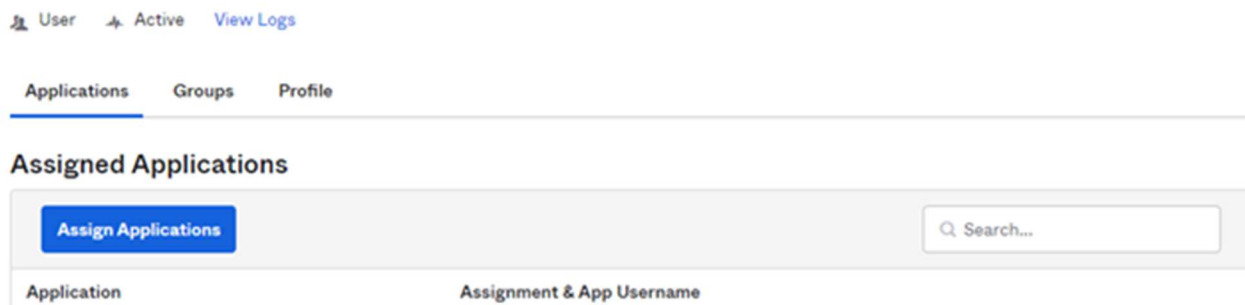
Directory **People** Help

[Add person](#) [Reset passwords](#) [Reset multifactor](#) [More actions](#)

Search...

Everyone	Person & username	Primary email	Status
2			Active
Onboarding			
Staged	0		Active
Pending user action	0		
Active			
Active	2		

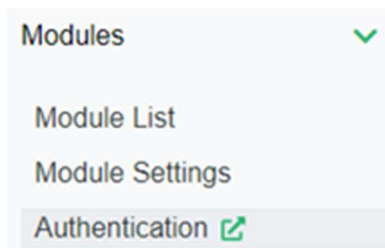
- b. Enter the person characteristics and **Save**.
- c. Click the user to access its properties
- d. Click **Assign Applications** and assign the OKTA application ("Hopex") to the user.



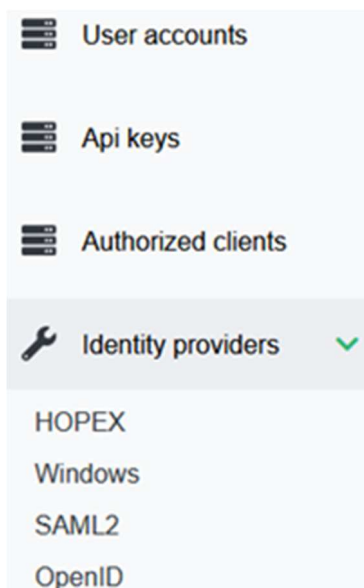
3.1.2. Configuring UAS with OKTA

To configure UAS with OKTA:

- 1) Connect to **HAS** console.
- 2) Access the **Authentication** module.
 - a. In the left pane, expand **Modules**.



- b. Click **Authentication**.
- 3) In **UAS Administration**, in the **Identity providers** section, select **SAML2**.



- 4) Click **Create**.

5) In **SAML2 Configuration**, to activate SAML2 Identity Provider, select **Active** and enter the required information:

- **Entity Identifier**
- **Metadata Location**

SAML2 Configuration

General
Certificate and signature
Organization
Contact
?

Active ☒

Display name

Saml2

The display name which can be shown in the button text on the login page

Entity Identifier

http://www.okta.com/exkewn3by[REDACTED]

The issuer url that the idp will be using when sending responses.

Metadata location

https://dev-492179.okta/app/exkewn3by[REDACTED]/sso/metadata

The url where is located the xml federation metadatafile

ClaimForRoles

http://schemas.xmlsoap.org/claims/Group

ModulePath

AuthServices

Application root relative path for Saml2 endpoints. The default is "AuthServices".

Assertion Consumer EndPoint: https://[REDACTED]mega.com/UAS/AuthServices/Acs

Cancel Save

3.2. OKTA Configuration with OpenID Connect

3.2.1. Configuring OKTA application

To configure OKTA application:

- 1) Connect to your OKTA account.
- 2) Go to **Admin Portal > Applications**: create an application.
- 3) Select:
 - **Sign-in method**: "OIDC – OpenID Connect"
 - **Application type**: "Web Application".

Create a new app integration

Sign-in method

[Learn More](#)

- ☒ **OIDC - OpenID Connect**
Token-based OAuth 2.0 authentication for Single Sign-On (SSO) through API endpoints. Recommended if you intend to build a custom app integration with the Okta Sign-In Widget.
- ☐ **SAML 2.0**
XML-based open standard for SSO. Use if the Identity Provider for your application only supports SAML.
- ☐ **SWA - Secure Web Authentication**
Okta-specific SSO method. Use if your application doesn't support OIDC or SAML.
- ☐ **API Services**
Interact with Okta APIs using the scoped OAuth 2.0 access tokens for machine-to-machine authentication.

Application type

What kind of application are you trying to integrate with Okta?

- ☒ **Web Application**
Server-side applications where authentication and tokens are handled on the server (for example, Go, Java, ASP.Net, Node.js, PHP)

4) Click **Next**.

5) In **General Settings**:

- Enter the **App integration name**.


Example: WebappOpenID




New Web App Integration

General Settings

App integration name

WebappOpenID

Logo (Optional) 

- Enter the **Sign-in redirect URIs** with the following URL syntax:

<https://<server name>/signin-oktaopenid> (in lower case letters)

Sign-in redirect URIs

Okta sends the authentication response and ID token for the user's sign-in request to these URIs

[Learn More](#)

☐ Allow wildcard * in sign-in URI redirect.

https://[redacted]/signin-oktaopenid

+ Add URI

Sign-out redirect URIs (Optional)

After your application contacts Okta to close the user session, Okta redirects the user to one of these URIs.

+ Add URI

- In **Assignments**: select your **Controlled access**.

For example: "Allow everyone in your organization to access"

Assignments

Controlled access

Select whether to assign the app integration to everyone in your org, only selected group(s), or skip assignment until after app creation.

- ☒ Allow everyone in your organization to access
- ☐ Limit access to selected groups
- ☐ Skip group assignment for now

Save

Cancel

6) Click **Save**.

You get **Client Credentials** information.

7) Write down the following information carefully as you will need it for UAS configuration:

- **Client ID**
- **Client secret**

Client Credentials

[Edit](#)

Client ID

Ooa3uzn4uzznPpkru5d7

Public identifier for the client that is required for all OAuth flows.

Client secret

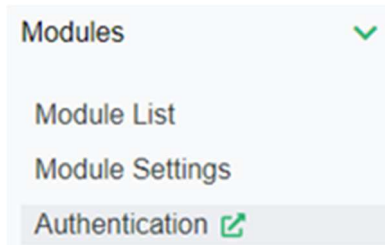
.....

Secret used by the client to exchange an authorization code for a token. This must be kept confidential! Do not include it in apps which cannot keep it secret, such as those running on a client.

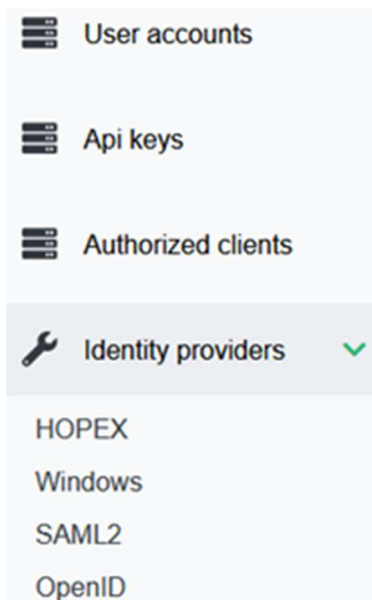
3.2.2. Configuring UAS with OKTA

To configure UAS with OKTA:

- 1) Connect to **HAS** console.
- 2) Access the **Authentication** module.
 - a. In the left pane, expand **Modules**.





- b. Click **Authentication**.
- 3) In **UAS Administration**, in the **Identity providers** section, select **OpenID**.



- 4) Click **Create**.
- 5) In **OpenId Configuration**, to activate OpenId Identity Provider, select **Active** and enter the required information:
 - **Authority server url**
 - **Client Identifier**
 - **Client secret**

MEGAHOPEX



UAS Administration



User accounts

Api keys

Authorized clients

 Identity providers 

v15.4.0.35

OpenId Configuration

General

☒ Active

Display name

oktaopenid

Authority server url

https://dev-27284285.okta.com/

Proxy url


Client Identifier


0oa3uzn4uzznPpkru5d7

Certificate

Secret

Client secret

IBg1YMyBznWDxfAqcza8nvO5V 

RedirectURI: https://  /uas/signin-oktaopenid

Scopes

openid email profile

ClaimForRoles

http://schemas.xmlsoap.org/claims/Group

ClaimForSub

MetadataAddress server url

Groups Authorized

Cancel

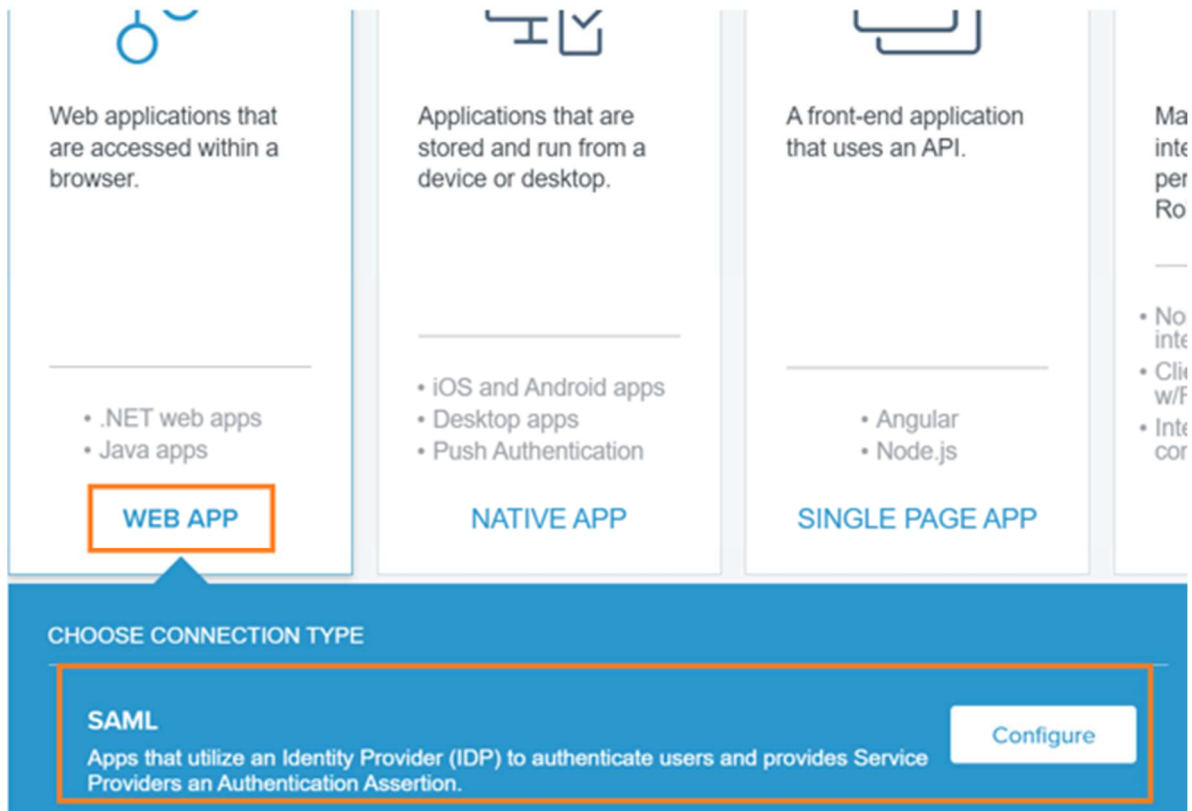
Save

3.3. Pingfederate Configuration with SAML2

3.3.1. Configuring Pingfederate application

To configure Pingfederate application:

- 1) Connect to your Pingfederate account.
- 2) Go to **Admin Portal > Applications**: create a Web application with SAML sign-in method:
 - **WEB APP**
 - **SAML**



- 3) Click **Configure**.
- 4) Enter the **Application name**.

Example: SAML2Pingfed

Personalize your application by creating a unique profile. The description will help your customers identify the purpose of the application and provide important information to misguided connections.

APPLICATION NAME

SAML2Pingfed

DESCRIPTION

ICON



Max Size 1.0 MB
JPEG, JPG, GIF, PNG

Cancel

Next

5) Click **Next**.

6) **Configure SAML Connection** as follows:

Configure SAML Connection

SAML is an authentication protocol that acts as a service provider (SP) to PingOne (the identity provider, or IdP).

PROVIDE APP METADATA

☐

Import Metadata

☐

Import From URL

☒

Manually Enter

ACS URLS

*

https://app.saml2pingfed.com/UAS/AuthServices/Acs

+ Add

SIGNING KEY

PingOne SSO Certificate for Administrators environment (Default)

Download Signing Certificate

☒

Sign Assertion

☐

Sign Response

☐

Sign Assertion & Response

Signing Algorithm *

RSA_SHA256

ENCRYPTION

☐

Enable Encryption

ENTITY ID *

https://www.example.com/authorize/oidc/uas

SLO ENDPOINT

SLO RESPONSE ENDPOINT

SLO BINDING

☒ HTTP POST ☐ HTTP Redirect

SUBJECT NAMEID FORMAT

urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress ▼

ASSERTION VALIDITY DURATION (IN SECS)

240

TARGET APPLICATION URL

☐ Enforce Signed Authn Request

VERIFICATION CERTIFICATE (OPTIONAL)

☒ None ☐ Import ☐ Choose from list

- Click **Save and Continue**.
- In **SAML ATTRIBUTES**, add an attribute statement “sub” and select “Email Address” as **Outgoing value**.

Attribute Mapping

Map your PingOne user defined attributes to the corresponding Application attribute for accessibility between users and this app.


SAML ATTRIBUTES




APPLICATION ATTRIBUTE	OUTGOING VALUE	
saml_subject	Email Address	<input checked="" type="checkbox"/> Required

[Advanced Expression](#)


[+ ADD ATTRIBUTE](#)

- 9) Click **Save and Close**.
- 10) Write down the following information carefully as you will need it for UAS configuration:
 - **Client ID**


PingfederateSAML2
 Client ID: 848f9be2-17a2-4f89-9432-ba751c2d0596

[Profile](#)
[Configuration](#)
[Attribute Mappings](#)
[Policies](#)
[Access](#)



App Type
 Web App (SAML)

Description
 Not Set

Client ID
 848f9be2-17a2-4f89-9432-ba751c2d0596

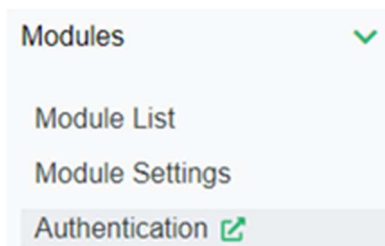
Home Page URL
 No Home Page Configured

Signon URL
 Default Signon Page

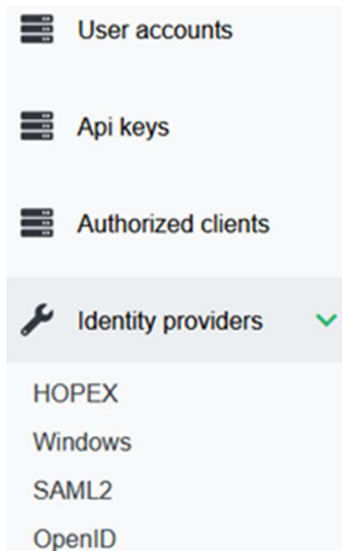
3.3.2. Configuring UAS with Pingfederate

To configure UAS with Pingfederate:

- 1) Connect to **HAS** console.
- 2) Access the **Authentication** module.
 - a. In the left pane, expand **Modules**.



- b. Click **Authentication**.
- 3) In **UAS Administration**, in the **Identity providers** section, select **SAML2**.



- 4) Click **Create**.
- 5) In SAML2 Configuration, to activate SAML2 Identity Provider, select **Active** and enter the required information:
 - **Entity Identifier**
 - **Metadata location**

SAML2 Configuration

General
Certificate and signature
Organization
Contact
?

Active ☒

Display name

pingfederateSaml2

The display name which can be shown in the button text on the login page

Entity Identifier

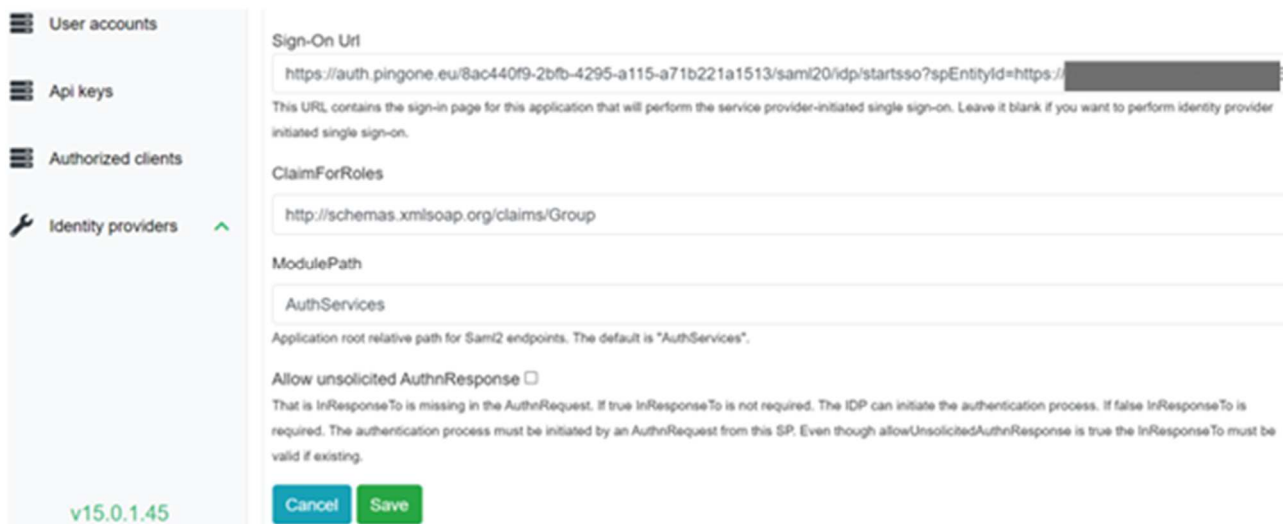
848f9be2-17a2-4f89-9432-ba[REDACTED]

The issuer url that the idp will be using when sending responses.

Metadata location

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/saml20/metadata/848f9be2-17a2-4f89-9432-ba[REDACTED]

The url where is located the xml federation metadatafile



Sign-On Url

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/saml20/ldp/startssso?spEntityId=https://...

This URL contains the sign-in page for this application that will perform the service provider-initiated single sign-on. Leave it blank if you want to perform identity provider initiated single sign-on.

ClaimForRoles

http://schemas.xmlsoap.org/claims/Group

ModulePath

AuthServices

Application root relative path for SAML2 endpoints. The default is "AuthServices".

Allow unsolicited AuthnResponse ☐

That is InResponseTo is missing in the AuthnRequest. If true InResponseTo is not required. The IDP can initiate the authentication process. If false InResponseTo is required. The authentication process must be initiated by an AuthnRequest from this SP. Even though allowUnsolicitedAuthnResponse is true the InResponseTo must be valid if existing.

Cancel Save

v15.0.1.45

6) Click **Save**.

To save and apply your changes, the instance and all related nodes need to be restarted. Any connected user will be disconnected.

7) Click **I understand the consequences, restart**.

3.4. Pingfederate Configuration with OpenID Connect

3.4.1. Configuring Pingfederate application with OpenID Connect

To configure Pingfederate application:

- 1) Connect to your Pingfederate account.
- 8) Go to **Admin Portal > Applications**: create a Web application with OIDC sign-in method:
 - **WEB APP**
 - **OIDC**

Web applications that are accessed within a browser.

- .NET web apps
- Java apps

WEB APP

Applications that are stored and run from a device or desktop.

- iOS and Android apps
- Desktop apps
- Push Authentication

NATIVE APP

A front-end application that uses an API.

- Angular
- Node.js

SINGLE PAGE APP

Ma
inte
per
Rol

- No
inte
- Clie
w/F
- Inte
cor

CHOOSE CONNECTION TYPE

SAML

Apps that utilize an Identity Provider (IDP) to authenticate users and provides Service Providers an Authentication Assertion.

Configure

OIDC

Employs Universal Login and redirect users to the login page.

Configure

9) Click **Configure**.

10) Enter an **Application Name**.

Example: Pingidconnect



11) Click **Next**.

12) In **Redirect URLS** enter the URL in the following format:

[Error! Hyperlink reference not valid. name>/uas/signin-ping](#)

REDIRECT URLS

[https://\[redacted\]/uas/signin-ping](https://[redacted]/uas/signin-ping) ×

Search scopes

SCOPES FILTERED BY: ALL SCOPE GRANTS 1

SCOPES	SCOPE GRANTS
<div>address openid +</div>	<div>email openid -</div>
<div>p1:create:device PingOne API +</div>	
<div>p1:create:pairingKey PingOne API +</div>	
<div>p1:delete:device +</div>	

Cancel Save and Continue

13) Click **Save and Continue**.

Attribute Mapping

Map your PingOne user defined attributes to the corresponding Application attribute for accessibility between users and this app.

OIDC ATTRIBUTES

APPLICATION ATTRIBUTE	OUTGOING VALUE	Required
sub	Email Address	<input checked="" type="checkbox"/>

Advanced Expression

+ ADD ATTRIBUTE

Cancel Save and Close

14) Click **Save and Close**.

15) Write down the following information carefully as you will need it for UAS configuration:

- **Client ID**
- **Client secret**

Pingidconnect
Client ID: 54d132ba-90f6-4d6d-8a64-d82faa3bf374

Profile

Configuration

Resources

Policies

Attribute Mappings

Access

^ URL

AUTHORIZATION URL :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/authorize

TOKEN ENDPOINT :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/token

JWKS ENDPOINT :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/jwks

USERINFO ENDPOINT :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/userinfo

SIGNOFF ENDPOINT :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/signoff

OIDC DISCOVERY ENDPOINT :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/.well-known/openid-configuration

TOKEN INTROSPECTION ENDPOINT :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/introspect

TOKEN REVOCATION ENDPOINT :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as/revoke

ISSUER :

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as

Pingidconnect
Client ID: 54d132ba-90f6-4d6d-8a64-d82faa3bf374

Profile

Configuration

Resources

Policies

Attribute Mappings

Access

^ GENERAL

CLIENT ID :

54d132ba-90f6-4d6d-8a64-d82faa3bf374

CLIENT SECRET :

bg1poF5b5XkcDYaAdSNSOZIRvC.aisICFNAP9NcTb0oN77

RESPONSE TYPE:

Code

GRANT TYPE:

Authorization Code

PKCE ENFORCEMENT:

OPTIONAL

REDIRECT URIS:

https://0/uas/signin-pingfederate

SIGNOFF URLS:

None Specified

TOKEN AUTH METHOD:

Client Secret Post

INITIATE LOGIN URI:

Not Specified

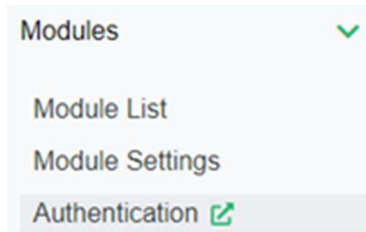
TARGET LINK URI:

Not Specified

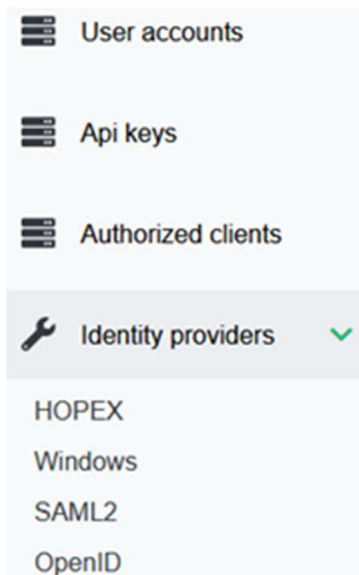
3.4.2. Configuring UAS with Pingfederate

To configure UAS with OKTA:

- 1) Connect to **HAS** console.
- 2) Access the **Authentication** module.
 - a. In the left pane, expand **Modules**.



- b. Click **Authentication**.
- 3) In **UAS Administration**, in the **Identity providers** section, select **SAML2**.



- 4) Click **Create**.
- 5) In **OpenId Configuration**, to activate OpenId Identity Provider, select **Active** and enter the required information:
 - **Authority server url**
 - **Client Identifier**
 - **Client secret**

MEGA HOPEX

UAS Administration

?

→

User accounts

Api keys

Authorized clients

Identity providers

v15.4.0.35

Api keys

Authorized clients

Identity providers

v15.4.0.35

OpenId Configuration

General

☒ Active

Display name

pingfederate

Authority server url

https://auth.pingone.eu/8ac440f9-2bfb-4295-a115-a71b221a1513/as

Proxy url

Client Identifier

54d132ba-90f6-4d6d-8a64-d82faa3bf374

Certificate Secret

Client secret

bg1poF5b5XkcDYaAdSNSOZIRvC.aislCFNAP9NcTbOoN77

RedirectURI: https://[redacted]/uas/signin-pingfederate

Scopes

openid email profile

ClaimForRoles

http://schemas.xmlsoap.org/claims/Group

ClaimForSub

MetadataAddress server url

Groups Authorized

Cancel Save

6) Click **Save**.

3.5. Azure AD Configuration with SAML2

3.5.1. Configuring Azure AD application

➔ Follow Microsoft documentation for detailed configuration:

<https://docs.microsoft.com/en-us/azure/active-directory/manage-apps/add-application-portal-setup-sso>.

To configure Azure AD application:

- 1) Connect to your Azure AD account.
- 2) In **Enterprise applications** create an application (e.g.: "Azure AD SAML Toolkit").
- 3) Access the SAML SSO configuration page (e.g.: in the **Manage** section > **Single Sign-On** page > **SAML**)
- 4) Configure the Azure AD application as follows:

In **Basic SAML Configuration**:

- **Reply URL (Assertion Consumer Service URL)** enter the reply URL in the following format:

<https://<server name>/UAS/AuthServices-Azure/Acs>

1

Basic SAML Configuration

Edit

Identifier (Entity ID)	https://[redacted]/UAS
Reply URL (Assertion Consumer Service URL)	https://[redacted]/UAS/AuthServices-Azure/Acs
Sign on URL	https://login.microsoftonline.com/62369be1-7d51-4ae3-892[redacted]/saml2
Relay State (Optional)	Optional
Logout Url (Optional)	Optional

In **Attributes & Claims**, configure at least one attribute and claim.

Example: emailaddress user.mail

2

Attributes & Claims

Edit

givenname	user.givenname
surname	user.surname
emailaddress	user.mail
name	user.userprincipalname
Unique User Identifier	user.userprincipalname
Group	user.groups

In **SAML Certificates**, write down the following information carefully as you will need it for UAS configuration:

- **App Federation Metadata Url**

3

SAML Certificates

Token signing certificate		Edit
Status	Active	
Thumbprint	5D7C0C8B1461D89E350 [redacted]	
Expiration	1/3/2023, 3:34:33 PM	
Notification Email	[redacted]	
App Federation Metadata Url	https://login.microsoftonline.com/62369be1-7d51...	
Certificate (Base64)	Download	
Certificate (Raw)	Download	
Federation Metadata XML	Download	

Verification certificates (optional) (Preview)
 Edit

Required	No
Active	0
Expired	0

In **Set up <application name>**, write down the following information carefully as you will need it for UAS configuration:

- **Azure AD identifier**

4

Set up [redacted]

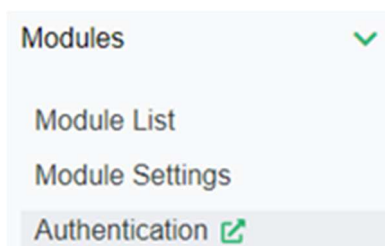
You'll need to configure the application to link with Azure AD.

Login URL	https://login.microsoftonline.com/62369be1-7d51...
Azure AD Identifier	https://sts.windows.net/62369be1-7d51-4ae3-892...
Logout URL	https://login.microsoftonline.com/62369be1-7d51...

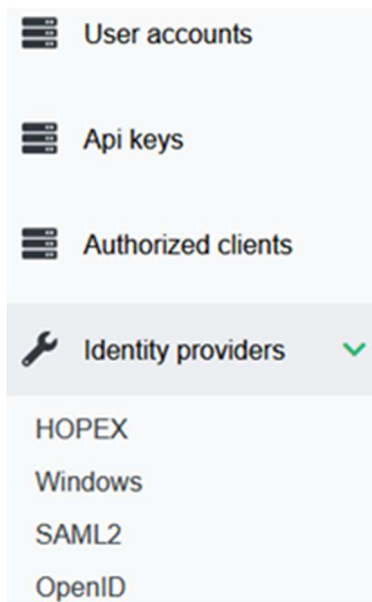
3.5.2. Configuring UAS with Azure AD

To configure UAS with Azure AD:

- 1) Connect to **HAS** console.
- 2) Access the **Authentication** module.
 - a. In the left pane, expand **Modules**.



- b. Click **Authentication**.
- 3) In **UAS Administration**, in the **Identity providers** section, select **SAML2**.



- 4) Click **Create**.
- 5) In SAML2 Configuration, to activate SAML2 Identity Provider, select **Active** and enter the required information:
 - **Entity Identifier**
 - **Metadata location**

SAML2 Configuration

General
Certificate and signature
Organization
Contact
?

Active ☒

Display name

Saml2

The display name which can be shown in the button text on the login page

Entity Identifier

https://sts.windows.net/62369be1-7d51-4ae3-892b-...

The issuer url that the idp will be using when sending responses.

Metadata location

https://login.microsoftonline.com/62369be1-7d51-4ae3-892b-...

The url where is located the xml federation metadatafile

Groups Authorized

ClaimForRoles

http://schemas.xmlsoap.org/claims/Group

ModulePath

AuthServices

Application root relative path for Saml2 endpoints. The default is "AuthServices".

Assertion Consumer EndPoint: https://.../UAS/AuthServices/Acs

Cancel Save

4. Terminology

4.1. Client

A client is a piece of software that requests tokens from UAS - either for authenticating a user or for accessing a resource (also often called a relying party or RP). A client must be registered with the OP.

Examples: Web applications, native mobile or desktop applications, Single Page Applications (SPA), server processes etc.

4.2. User

A user is a person who is using a registered client to access his/her data.

4.3. Scope

Scopes are identifiers for resources that a client wants to access. This identifier is sent to the OP during an authentication or token request.

By default, every client can request tokens for every scope, but you can restrict that.

They come in two flavors.

4.3.1. Identity scopes

Requesting identity information (aka claims) about a user, e.g. his name or email address, is modeled as a scope in OpenID Connect.

There is for example a scope called profile that includes first name, last name, preferred username, gender, profile picture and more. You can read about the standard scopes [here](#) and you can create your own scopes in UAS to model your own requirements.

4.3.2. Resource scopes

Resource scopes identify web APIs (also called resource servers) - you could have for example a scope named calendar that represents your calendar API.

4.4. Authentication/Token Request

Clients request tokens from the OP. Depending on the scopes requested, the OP will return an identity token, an access token, or both.

4.4.1. Identity Token

An identity token represents the outcome of an authentication process. It contains at a bare minimum an identifier for the user (called the sub aka subject claim). It can contain additional information about the user and details on how the user authenticated at the OP.

4.4.2. Access Token

An access token allows access to a resource. Clients request access tokens and forward them to an API. Access tokens contain information about the client and the user (if present). APIs use that information to authorize access to their data.

MUST Licence Installation Guide

Summary

Check if a more recent version of this document is available in online documentation (MEGA Community).

This document describes the procedures necessary for installing Must licences with HOPEX V5.0 and higher CP.

It applies to all Front-ends.

It does not describe:

- System requirements and possible architectures (see architecture overview documentation).
- How to install a product release (see installation documentation).
- How to manage installations (see administrator manuals).
- How products are licenced (see licensing documentation).

1. Foreword	4
2. Get a licence from Sales Administration	6
2.1. Choose a machine to host the licence folder	6
2.2. Create a licence folder	6
2.3. Get licence file.....	7
3. Install Must licence	7
3.1. Copy Must licence file	7
3.2. Configure file permissions.....	7
3.3. Specify licence folder during installation	8
4. Configuration and monitoring procedures.....	9
4.1. Must licence utility (Licensing.exe)	9
4.2. Set a default licence	10
4.3. Manage users using a license	10
4.4. Configure a user as a possible user of a product	10
4.5. Clean up licence tokens	11
4.6. Monitor licence use	11
5. Customizing the command line	13
5.1. Configure main users (/RW /RO)	13
5.2. Configure viewer profiles (/HV).....	14
5.3. Configure contributor profiles (/HC)	15
5.4. Configure profiles for value packs	16
6. Inside.....	17
6.1. Licence check at login.....	17
6.2. Token requested at runtime	17
6.3. Files access	18
7. FAQs and Troubleshooting	19

1. Foreword

HOPEX Must is the usual type of licences provided by MEGA Sales administration to enable execution of HOPEX software. It is a proprietary technology of MEGA.

To obtain or update your licence, contact your sales representative.

- A UNC will be requested.
- A .must licence file will be sent with installation instructions.

A Must licence:

- Is a file with a .must extension.
- Contains the definition of the licence (locking information, expiration date and list of products).
- Is locked on a shared folder (UNC address).
- Is required to run HOPEX Web Front-End (HOPEX Application Server).
- Is required to run HOPEX Windows Front-end (for customization).

It is distinct from installation key required to install HOPEX V5.0 or higher version. An installation key is a string such as mg.5i1542vixa7ptl9qocsev4zico5tzgqpzqnfc. It will define the list of modules available for download and installation in HOPEX Store (<https://store.mega.com/>).

A Must licence is usually programmed with distinct **solutions**.

Ex: HOPEX Business Process Analysis (code HBPA)

Licence tokens provide access to the particular solution.

A Must licence can also be programmed with **value packs**.

A value pack is a set of HOPEX Solution used as a whole.

Licence tokens provide access to all the solutions of the value pack.

As a convention, value packs and solutions will be named as products later in this document.

Each product can be managed in different modes.

Mode	Description	Example
Dedicated mode	License tokens is dedicated to a specific user. This user is sure to get this token.	20 registered users 2 tokens APM assigned to User U0001 User U0002
Shared mode	License token is shared with users Only users configured as possible user for the product (subset of registered users) can use the token provided if is available	20 registered users 2 token APM for 4 users User U0001 User U0004 User U0005 User U0007 16 (20-4) other users cannot use them
Concurrent mode (floating mode)	License token is shared with users Any registered user can use a token provided it is available.	20 registered users 5 token APM

There are three exclusive types of users.

Type	Description	Example
Viewer users	consult data, search, use collaboration features Cannot edit properties or diagrams	profile Application Owner
Contributor user	consult data, search, perform limited updates, use collaboration feature Cannot edit diagrams	profile Application Contributor
Main users	consult data, search, perform all updates in particular via diagram editor, use collaboration features	profile ITPM Functional Administrator

2. Get a licence from Sales Administration

There are three situations where you will need a new Must licence:

- When you purchase HOPEX products (new license).
- When you negotiate a different licence content (licence update).
- When you relocate Must licence folder (licence relocation).

To obtain or update your licence, contact your sales representative.

- A UNC will be requested.
- A Must licence file will be sent by MEGA Sales Administration.

2.1. Choose a machine to host the licence folder

If you do not have the technical skills or the authorization required for this step, contact your system administrator.

Recommendations:

- With single server deployment, use the HOPEX Server.
- With multiple server's deployment, choose one of the back-end servers.
- Target server should be an efficient file server.
- At runtime, file access will be made from module HOPEX Core.

2.2. Create a licence folder

If you do not have the technical skills or the authorization required for this step, contact your system administrator.

Create a shared folder, as far as possible in a DFS.

The licence folder must be accessible as a UNC address, meaning a shared folder with one unique address on the network.

Examples of authorized sharing:

```
\\Server001\Licences
\\Domain01\Applications\HOPEX\Licences (DFS)
\\Server001.Domain01.com\Licences (FQDN)
```

Examples of unauthorized sharing:

```
\\Server002\c$\ HOPEX\Licences (administrative share)
M:\Licences (network letter)
```

Notes:

- The shared folder name will be used as a parameter for programming the licence. If it changes, the license will no longer be valid.
- The licence folder must be accessible as a UNC with permission **modify** to all Windows accounts that run HOPEX Core components. If you want to configure smarter permissions, consult the 'FAQs and troubleshooting' section of this document.

2.3. Get licence file

Send the shared folder path to MEGA Sales Administration when requested.
You will get a .must file valid for this path

3. Install Must licence

3.1. Copy Must licence file

Once you have a .must licence file valid for a shared folder path:

- Browse the shared folder path, ex: \\Server001\Licences.
- Copy the .must licence file (ex: Licence-Y9999.must) to this folder.

You can check there is no mismatch by viewing licence file content with a text editor.

Licence file content	... [MEGAShareLicence] MG_SERVER_PATH =\\Server001\Licences\Licence-Y9999.must
Check	MG_SERVER_PATH = <share folder path> \ <.Must licence file> -> OK

3.2. Configure file permissions

At runtime, files will be created dynamically in a hidden subfolder in the licence folder.
It is necessary to configure file permissions so that execution is correct.

Grant the permission **Modify** for the licence folder (ex: \\Server001\Licences and its subfolders) to Windows account that run HOPEX Core components.

The list of windows users varies with the front-end:

Front-end	Users to be configured
Web Front-end (HOPEX Application Server)	Local user SYSTEM by default (1)
Windows Front-end (customization or administration)	Local user SYSTEM by default (1) Each account allowed to <ul style="list-style-type: none"> • Run HOPEX.exe for customization tasks • Run Administration.exe for administration tasks • Run Licensing.exe

(1) if another account is used, configure identify of windows service **HAS Instance Manager**.

3.3. Specify licence folder during installation

From HOPEX V5.0 and HOPEX Application Server, deployment is different from previous versions.

Installation of the license is a step of the overall installation procedure.

- Installation of HAS Instance Manager
- Creation of HAS instance.
 - Licence folder can be specified (optional)
 - HOPEX Core programs are installed
 - A configuration database is created.
- Configuration of the HAS instance.
 - Licence folder must be specified if not done earlier.
- Restart of the HAS Instance.

To install HOPEX Application server, follow document HOPEX Application Server - Installation V5.0 EN.

The key step is 'Adding Must license to MegaSite.ini setting'

You must be ready to add the following section

[Must Licence]

Path=<licence folder>

You can edit this section to update megasite.ini

DefaultDataLanguage=00(6wlHmk400

DefaultGUILanguage=00(6wlHmk400

[Must Licence]

Path=\\Server001\\Licences

Custom megasite content

Save

This specification is saved in the configuration database used by the HAS instance.

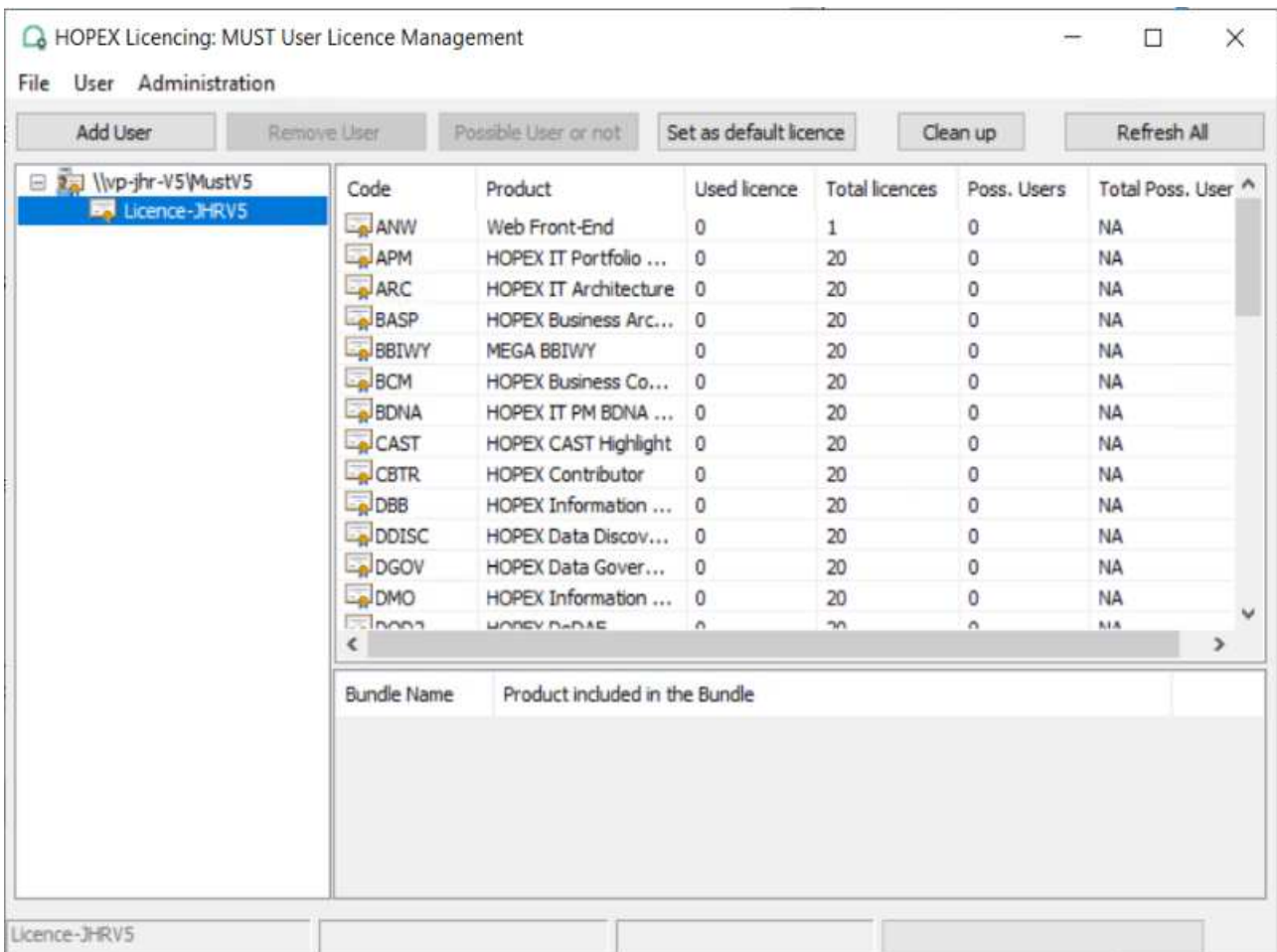
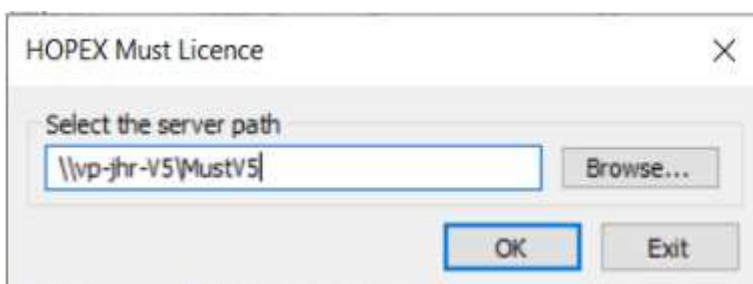
4. Configuration and monitoring procedures

4.1. Must licence utility (Licensing.exe)

A utility **Licensing.exe** is available in the folder of the HAS instance
ex: C:\ProgramData\MEGA\Hopex Application Server\5000

Run **Licensing.exe**

- A path is requested
- Select the license folder path
- Licence is loaded.



4.2. Set a default licence

It is possible to specify a default licence if several Must licences exist.

In Licensing.exe

- Select the license in the left pane.
- Click on button **Set as default licence** in the top toolbar.

4.3. Manage users using a license

This is important in several situations:

- Several Must licences exist: users should be allocated in the different licences unless a default licence is specified.
- Shared licence: possible users should be specified beforehand.
- Dedicated licence: named users should be specified beforehand.

Users are identified by their login in HOPEX.

Ex: the HOPEX login of John Smith is 'U0001'

Add a user to a licence

In Licensing.exe

- Select the license in the left tree.
- Click on button **Add user** in the top toolbar.
A window **Add user to a licence** is displayed.
- enter the login name (Ex: enter 'U0001' for the user 'John Smith is 'U0001') and click **OK**.

Remove a user from a licence

In Licensing.exe

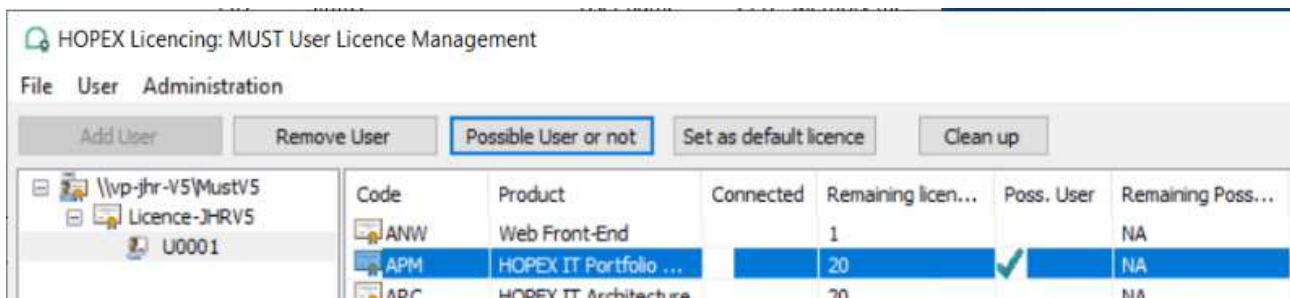
- Select the license in the left tree.
- Select the user to remove in the left tree
- Click on button **Remove user** in the top toolbar.

4.4. Configure a user as a possible user of a product

Set a user as possible user

In Licensing.exe

- Select the license in the left tree.
- Select the product to be configured in the top right pane.
- Select the user to be set as a possible user of the product.
- Click on button **Possible user or not**.
A green checkmark is displayed in the column **Poss. User**.



This specification is saved by creating a file in a subfolder of the licence folder
ex: create file <licence folder>\Licence-Y9999\USERS\U0001.usr-APM-MEGA.

Remove a user as possible user

In Licensing.exe

- Select the license in the left tree.
- Select the product to be configured in the top right pane.
- Select the user to be set as a possible user of the product.
A green checkmark is displayed in the column **Poss. User**.
- Click on button **Possible user or not**.
The green checkmark is removed in the column **Poss. User**.

4.5. Clean up licence tokens

In Licensing.exe

- Select the license in the left tree.
- Click on button **Clean up**.

This action purges unexpected token files.

4.6. Monitor licence use



The utility **Licensing.exe** displays several elements:

- A top menu (File, User, Administration) and a toolbar 'Add User, Remove User..)
- The left tree displays the Must licence available in the selected folder.
- The top right pane displays the products available for the selected licence.
- The bottom right pane displays the bundle definition, if any.

The licence status is displayed in the left tree:

Display	Status	Possible causes
Licence-T0001	Valid	-
Licence-T0001	Invalid	Licence has expired Locking failed: the folder address containing the licence file does not match the expected UNC

The user status is displayed in the left tree:

Display	Status
 U0001	Connected
 U0001	Not connected

The top right pane has several columns. The list is different if a user or a licence is selected:

- **Code:** the code of the technical product.
- **Product:** the name of the technical product.
- **Connected:** the number of users currently logged in to the product (this figure changes over time).
- **Used licences:** the number of licence tokens currently used for the product (this figure changes over time).
- **Remaining licences:** the number of licence tokens currently available for the product (this figure changes over time).
- **Total licences:** the number of licence tokens programmed for the product (this figure does not changes over time).
- **Poss. User:** the number of users that are set as possible users of the product (this figure changes over time).
- **Remaining Poss. Users:** the number possible users currently available for the product (this figure changes over time).
- **Total Poss. Users:** the number possible users programmed for the product (this figure does not changes over time).

5. Customizing the command line

With HOPEX out of the box, it is not necessary to change command lines. This can be useful if you need to

- Design new profiles.me
- Use value packs.
- Tune license vision of a specific user.

Remember that it is not recommended to alter command line of standard profiles.

Each product is associated to a product code.

Ex: HOPEX Business Process Analysis code 'HBPA'

A property **Command line** can be configured at several levels:

Level	Comment
Profile level	Configuration at this level is recommended. As there are less profiles than users, configuration is easier to maintain.
User level (Login)	Configuration at this level is NOT recommended. It is mainly available for compatibility with previous versions.

At each level, it is possible to specify a command line according to the type of user chosen.

Type of users	Possible syntax	Examples
Main users	/RW'<list of product codes> /RO'< list of product codes>	/RW'DMO;HBPA' /RW'DMO;HBPA' /RO'DBB'
Viewer users	/HV'<list of product codes>	/HV'HBPA'
Contributor users	/HC'<list of product codes>	/HC'APM'

Where:

- /RW: defines a list of product code accessed in read/write mode. Note that /K (previous specification) is equivalent to '/RW'
- /RO: is optional and defines a list of product code accessed in read/only mode. Note that /RO is only a complement to /RW and cannot be used without /RW. Do not use /RO command lines to provide a consultation access. Use viewer users instead.
- /RW, /HV and /HC are exclusive. They cannot be mixed in a command line.

5.1. Configure main users (/RW /RO)

Configure profile command line

Use the /RW syntax and eventually /RO syntax and quote product codes.

Ex:

/RW'APM,HBPA' for main users on APM

/RW'APM,HBPA' /RO'DBB' for main users on APM and consultation on DBB

It is not possible to use /RO without /RW

Ex

/RO 'APM,DBB' is not allowed

5.2. Configure viewer profiles (/HV)

By convention, a product programmed in dedicated mode will use the VIEW counter. Check the licence.

Extract of licence description	Comment
[MEGAComponentInfo] (LAN) HOPEX MainUser=3 ; 0 (RSQ) Repository Storage (SQL Server)=YES (DMO) HOPEX Logical Data=3 ; 5 (SUP) HOPEX Power Supervisor=1 ; 1 (APM) HOPEX IT Portfolio Management=1 ; 1 (ANW) Web Front-End=NO (HPP) HOPEX Productivity Pack=NO (HBPA) HOPEX Business Process Analysis=3 ; 3 (CBTR) HOPEX Contributor=1 ; 0 (VIEW) HOPEX Viewer=1 ; 0 APM_F=5 ; 0 LAN_D=5 ; 0 LAN_F=3 ; 0 [MEGABundleInfo] APM_F=APM LAN_D=LAN LAN_F=LAN	Counter of main users (shared mode) - - Programmed in shared mode Programmed in dedicated mode Programmed in dedicated mode - - Programmed in dedicated mode Counter of contributor users Counter of view users Programmed in concurrent mode Counter of main users (dedicated mode) Counter of main users (concurrent mode)

Configure profile command line

Use the /HV syntax and quote product codes.

Ex: /HV'APM,DBB'

5.3. Configure contributor profiles (/HC)

By convention, a product programmed in dedicated mode will use the CBTR counter. Check the licence.

Extract of licence description	comment
[MEGAComponentInfo] (LAN) HOPEX MainUser=3 ; 0 (RSQ) Repository Storage (SQL Server)=YES (DMO) HOPEX Logical Data=3 ; 5 (SUP) HOPEX Power Supervisor=1 ; 1 (APM) HOPEX IT Portfolio Management=1 ; 1 (ANW) Web Front-End=NO (HPP) HOPEX Productivity Pack=NO (HBPA) HOPEX Business Process Analysis=3 ; 3 (CBTR) HOPEX Contributor=1 ; 0 (VIEW) HOPEX Viewer=1 ; 0 APM_F=5 ; 0 LAN_D=5 ; 0 LAN_F=3 ; 0 [MEGABundleInfo] APM_F=APM LAN_D=LAN LAN_F=LAN	Counter of main users (shared mode) - - Programmed in shared mode Programmed in dedicated mode Programmed in dedicated mode - - Programmed in dedicated mode Counter of contributor users Counter of view users Programmed in concurrent mode Counter of main users (dedicated mode) Counter of main users (concurrent mode)

Configure profile command line:

Use the /HC syntax and quote product codes.

Ex: /HC'APM,HBPA'

5.4. Configure profiles for value packs

A value pack is a set of products used as a whole.

ex: value pack VPP_F aggregates the following products:

APM;ADES;DBB;DMO;ERML;HBPA;HBAS;BASP;HCJ;HITA;HITS;PPM;IDEA;INFA;HAM.

By convention, a product programmed via a value pack will use the counter of the value pack code. Check the licence.

Extract of licence description	Comment
<pre>[MEGAComponentInfo] (LAN) HOPEX MainUser=10 ; 0 (RSQ) Repository Storage (SQL Server)=YES (SUP) HOPEX Power Supervisor=1 ; 1 (MTS2) HOPEX Power Studio=1 ; 1 (CBTR) HOPEX Contributor=10 ; 0 LAN_D=1 ; 1 VPP_F=10 ; 0</pre>	<p>Counter of value pack</p>
<pre>[MEGABundleInfo] LAN_D=LAN VPP_F=APM;ADES;DBB;DMO;ERML;HBPA;HBAS; BASP;HCJ;HITA;HITS;PPM;IDEA;INFA;HAM;</pre>	<p>code and definition of value pack</p>

Configure profile command line:

Use the /RW or /HC or /HV syntax and quote product codes.

Ex:

/RW'VPP_F' for main users.

/HC'VPP_F' for contributor users.

/HV'VPP_F' for viewer users.

6. Inside

6.1. Licence check at login

When HOPEX is run by user U0001:

1. Configuration is read to identify the licence folder mapped to the HAS instance.
2. Licence folder is read to identify
 - The authorized licence file for this user.
 - The definition of the licence
 - The possible products for this user
 - The available tokens for each product of the license
3. Command line is read at both profile and login level to identify the requested products
4. Connection is refused if:
 - Command line is inconsistent
 - Products tokens are not available
5. Connection is allowed otherwise
Possible user files can be created dynamically
Token files are created according to product used

6.2. Token requested at runtime

Web Front-End (HOPEX Application Server)

Context	Must licence checked	Main counter used	Tokens requested	Command line considered
HOPEX Main users (Common situation)	Yes	LAN	One token per Product One token LAN (2)	Yes
HOPEX Main users (controlled multi front-end)	Yes (1)	LAN	One token per Product One token LAN (2)	Yes
HOPEX Contributor	Yes	CBTR	One token for CBTR	Yes
HOPEX Viewer	Yes	VIEW	One token for VIEW	Yes
Web Service API	No (3)	-	-	-

(1) ANW product should be programmed.

Ex: ANW is required to run ARC (controlled multi front-end).

(2) LAN or LAN_D, or LAN_F.

(3) UAS token is requested

With Windows Front-end (customization or Administration)

Context	Must licence checked	Tokens requested	Command line considered
Administration.exe	Yes	One token SUP One token LAN (1)	No
HOPEX.exe with HOPEX Power Studio (MTS2)	Yes	One token MTS2 One token LAN (1)	Yes

6.3. Files access

A licence folder can contain one or more licences.

For each licence, a hidden folder is created with the licence name

Ex:

<licence folder>\Licence-Y9999.must licence file

<licence folder>\Licence-Y9999 hidden folder

The hidden folder contains 2 subfolders.

Folder	Description	Example
TOKENS	Enables to count product tokens used at runtime Each product has a subfolder 1 token = 1 file	When user U0001 opens a session with product APM, a file TOKEN-CA58CCE4613838E4-u-U0001.tkn-APM is created automatically in <hidden folder>\TOKENS\APM Where <ul style="list-style-type: none"> • U0001 is login name • APM is product code • CA58CCE4613838E4 is an ID generated at runtime This file will be deleted automatically when users U0001 logs out (end of session)
USERS	Enables to configure possible user Flat list 1 possible user seat = 1 file	When U0002 is set as possible user of HBPA, a file U0002.usr-HBPA-MEGA is created in <hidden folder>\USERS where <ul style="list-style-type: none"> • U0002 is login name • HBPA is product code This file is not deleted automatically

A file Router.ini is created in the licence folder.

It saves:

- The default licence if any
- The assignment of users (logins) to licences

7. FAQs and Troubleshooting

7.1.1. Do I have to configure possible users?

This is not mandatory. Possible user tokens are generated dynamically at runtime. When user U0001 logs as main user, a token is requested for each product mentioned in the command line (/RW). If possible user seats are available, U0001 is automatically configured as a possible user for the requested products. It can be necessary to manage assignment of possible users.

7.1.2. Do I have to add each user in Licensing.exe?

This is not mandatory. Users (logins) are added dynamically at runtime. It can be necessary to declare explicitly users that did not yet connect and you want to manage assignment of possible users.

7.1.3. How can I prevent the dynamic declaration of possible users?

There is no way of preventing a user who is not explicitly configured from logging in. If a possible user seat is available, the system will set a user requesting a token as a possible user. To fully control the assignment, it is recommended you configure possible users beforehand.

7.1.4. Is my licence shared, concurrent or dedicated?

Licensing mode (dedicated, share, concurrent) is not set at licence level but at product level

To check the licensing mode, you need to understand the .Must licence
The mode depends on the combination of 2 digits.

<Licence Product>=T ; U

Where:

T: tokens

U: users

Licensing mode	Example
Dedicated mode (T=U)	(HITA) HOPEX IT Architecture=20 ; 20
Shared mode (T< U)	(HITA) HOPEX IT Architecture=20 ; 25
Concurrent mode/floating mode (T>U, U=0)	(HITA) HOPEX IT Architecture=20 ; 0

7.1.5. Error: The license file XX is not valid. The crypted path does not correspond to the license path file

Possible reasons:

- The path of the folder containing the Must licence file does not match the path programmed in the licence.
- The path of the folder quoted in the configuration does not match the path programmed in the licence.
- The licence file name does not match the file name programmed in the licence (licence file was renamed).

How to Install Hotfix

Summary

Check if a more recent version of this document is available in the online documentation (MEGA Community).

This document describes the procedures necessary for installing a hotfix for HOPEX V5.0 with HAS deployment mode.

It is assumed here that the administrator has a live access to the HOPEX store (internet access).

Important

Starting from HOPEX V5 CP2 the pre-requisite is ASP.NET Core runtime 6.0 (hosting Bundle). Check this requirement before upgrading to CP2 or a higher CP.

1. Foreword	3
1.1. HAS instance	3
1.2. HAS module.....	3
1.3. HAS bundle	3
1.4. Hotfix in HAS deployment	4
2. Upgrading a HOPEX bundle.....	6
2.1. Pre-conditions:.....	6
2.2. Online procedure (internet access)	6
2.3. Offline procedure (no internet access).....	9
3. Upgrading an HOPEX module.....	12
4. Upgrading HOPEX data	14
4.1. Pre-update	14
4.2. Update procedure.....	14
4.3. Post-update.....	15
5. FAQs	17

1. Foreword

1.1. HAS instance

In HOPEX Application Server deployment, an installation is named **instance**. Each HAS Instance is mapped to:

- A Port: 5000, 5001, 5002...
- A mode: Development, Training, Staging (synonym: Test, QA...), Production.
- A version of HOPEX
- One HOPEX environment. Using multiple environments is not supported

HAS Instances are managed by a program named Instance Manager.

1.2. HAS module

In HOPEX Application Server deployment, each component is delivered as a **module**. Each module has its version, its dependencies.
In concrete terms, a module is a .haspkg file.

Module	System module	Short description
HOPEX Core Back-End V5.0	Yes	Core of HOPEX platform. Most important module. Code: hopex.core
HAS Identity Provider	Yes	Component used for authentication. Code: has.uas
Bold BI	No	Component used to design widgets. Code: dashboard.boldbi
HOPEX360	No	Web site Template. Code: hopex360
...		

1.3. HAS bundle

System modules are packaged in a **bundle** named 'HOPEX'.
Non-system modules are available as independent modules.
In concrete terms, a bundle is a folder .haspackages containing a set of .haspkg files.

A bundle packages a specific combination of system-modules in different versions compatible with each other. Example:

Bundle	Module	Version
Bundle 5.0.710 (HOPEX V5.0 - 64 bits)	HAS Console	15.0.0+157
	HAS Identity Provider	15.0.0+157
	HOPEX Questionnaire Builder	15.0.0+5947
	HOPEX Core Back-End V5.0	15.0.0+5947
	HOPEX Web Front-End V5.0	15.0.0+5947
	HOPEX GraphQL	7.87.506+5947
	HOPEX Redis	1.0.2
	HOPEX REST API	7.87.506+5947

1.4. Hotfix in HAS deployment

A hotfix provides a consistent set of urgent fixes (severe error fixes or security fixes), for one or several modules of an HAS Instance.

The hotfixes provided for HOPEX Software are cumulative.

- Each hotfix of a module is a new version of this module.
- Each hotfix of a bundle is a new version of this bundle. It will update all the modules included in this bundle.

When the hotfix is installed, each elementary component of the related module will be replaced. This means that hotfix size can be significant.

Modules and Bundles can be downloaded and installed via administration consoles provided access to HOPEX Store is available online (<https://store.mega.com/>). Bundles can be downloaded first as offline package to be installed later offline.

The action depends on the situation.

Example of hotfix	Modules impacted	Action
Situation 1: one or several system modules is/are impacted	hopex.core (system)	Update the whole bundle using the bundle hotfix
Situation 2: one or several non-system modules is/are impacted	dashboard.boldbi (non-system)	Update each module impacted, ex: dashboard.boldbi
Situation 3: both system modules and non-system modules are impacted	hopex.core (system) dashboard.boldbi (non-system)	Update the whole bundle + update module dashboard.boldbi

Certain modules (ex: 'hopex.core') require an update of the data (system repository).

Before proceeding, make sure that, for all the HOPEX environments to upgrade:

- Data is backed up (physical backup).
- The password of the login **System** is known.
This is very important since it will be requested to login with the login System.

There are two typical deployment contexts for HOPEX Application Server (HOPEX programs)

- HOPEX programs are deployed on a single server. There is no concern to replicate updated programs.
- HOPEX programs are deployed on multiple servers (**cluster deployment**). There is a concern to replicate updated programs to each server (node) of the cluster.

So far, deployment of bundles (hotfix update, CP updates) in cluster is not automatic. It is required to download and install bundle on each server of the cluster.

2. Upgrading a HOPEX bundle

This procedure applies to both single server deployment and cluster deployment. It is required to download and install bundle on each server

2.1. Pre-conditions:

- Identify the bundle to install (target bundle).
Ex: 5.0.XXXX (HOPEX V5.0 HF1- 64 bits - Official)
This information is usually provided by MEGA Technical Support.
- Identify the url of the HAS Instance Manager Console
Ex: <http://localhost:30100/>
- Identify the HAS instance to upgrade (target HAS instance)
Ex: preproduction instance <http://svr0101:5001/>
This information is provided by the project.
- Know the credentials for the HAS Console of this instance.
This information is provided by the project.
- Check that no user is connected to the HAS instance.

2.2. Online procedure (internet access)

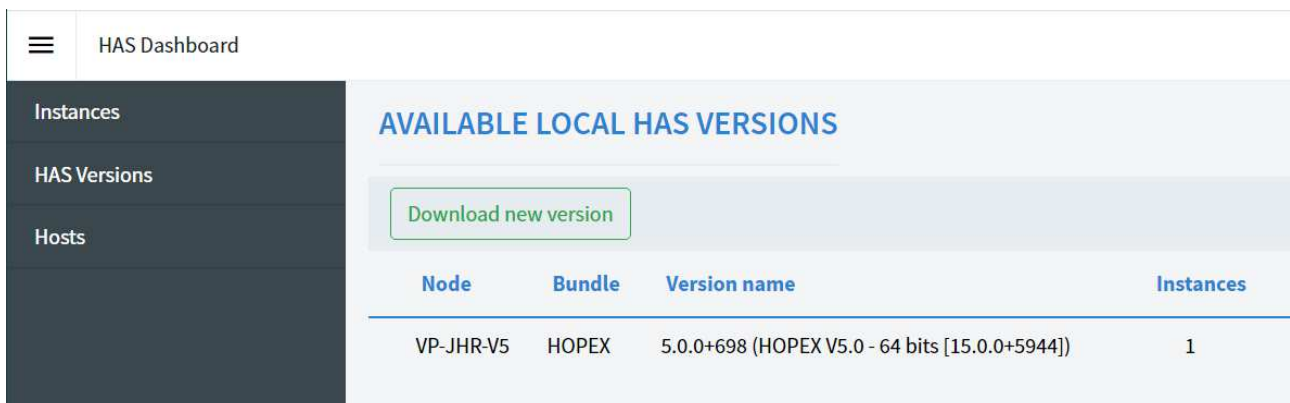
The procedure applies to an HAS instance.

Here, it is assumed that:

- You can access the HOPEX store <https://store.mega.com>.
- You have an installation key.

For each HAS instance:

1. Enter the url of the HAS Agent Console
Ex: <http://localhost:30100/>
2. In the left menu, select **HAS Versions**



Node	Bundle	Version name	Instances
VP-JHR-V5	HOPEX	5.0.0+698 (HOPEX V5.0 - 64 bits [15.0.0+5944])	1

3. Click on **Download new version**.
4. Select carefully the version to install (ex: 5.0.0+793 (**HOPEX V5.0 HF1-15.0.1.5972**)) in the list and click **Download**.

Download a new version

Machine name
VP-JHR-V5

Select a bundle
HOPEX

Select a version
5.0.0+793 (HOPEX V5.0 - HF1 [15.0.1+5972])

☐ Show all versions

Download will be processed in the background

Close Download

- Wait a few minutes up to the end of the download (100% then extraction). A new folder is created in C:\ProgramData\MEGA\Hopex Application Server\.binaries\HOPEX, ex V5.0.0+793

AVAILABLE LOCAL HAS VERSIONS

Download new version

Node	Bundle	Version name	Instances
VP-JHR-V5	HOPEX	5.0.0+710 (HOPEX V5.0 - 64 bits - Official)	2
VP-JHR-V5	HOPEX	5.0.0+793 (HOPEX V5.0 - HF1 [15.0.1+5972])	0 <div>33%</div>

- In the left menu, select **Instances**.
- Select the target instance and click **Stop** and confirm HAS instance stops.

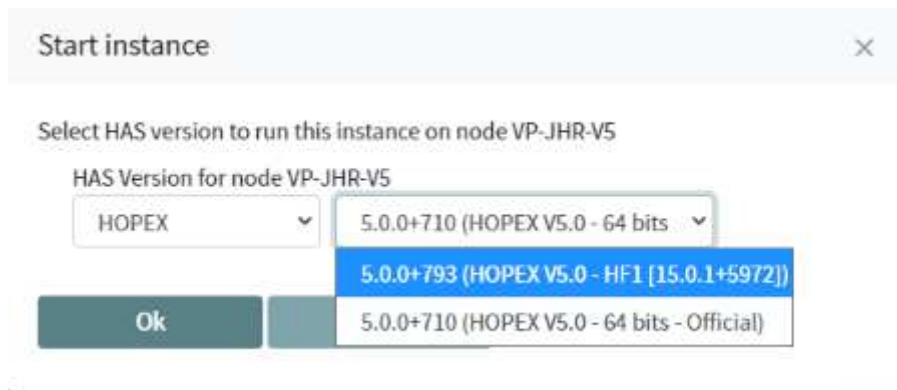
Cluster JHR_ONE-V5-5002 Production

<https://vp-jhr-v5:5002> Add cluster node

Node	Port	Bundle	Version	Status	Actions
VP-JHR-V5	5002	HOPEX	5.0.0+710	Stopped	<div>Start</div> <div>Delete</div>

- Select the target instance and click **Start**.

9. In the page 'Start instance', select carefully the target bundle (ex 5.0.0+793 (**HOPEX V5.0 HF1**[15.0.1.5972])) and click **OK**
HAS instance starts



10. In the left menu, select **HAS Versions**.
11. You can delete previous programs (ex 5.0.0+698) if there no associated instance by clicking on the dustbin icon.

AVAILABLE LOCAL HAS VERSIONS				
Download new version				
Node	Bundle	Version name	Instances	
 VP-JHR-V5	HOPEX	5.0.0+698 (HOPEX V5.0 - 64 bits [15.0.0+5944])	0	

12. **Open** the HAS Console related to the target instance and check that all modules are loaded.

2.3. Offline procedure (no internet access)

The procedure applies to an HAS instance.

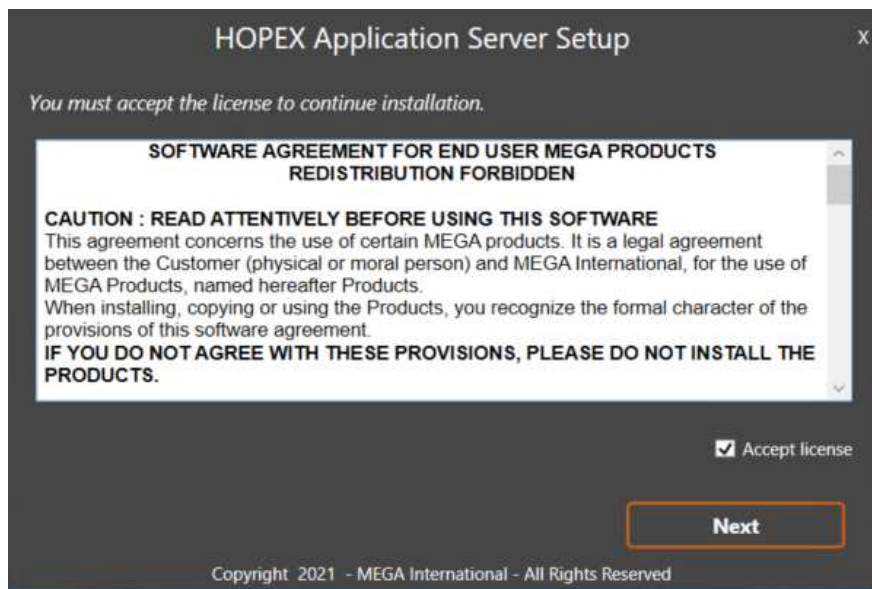
Here, it is assumed that you have received a folder containing an offline package (downloaded previously).

Browse the folder containing the offline package related to the hotfix.
It must contain:

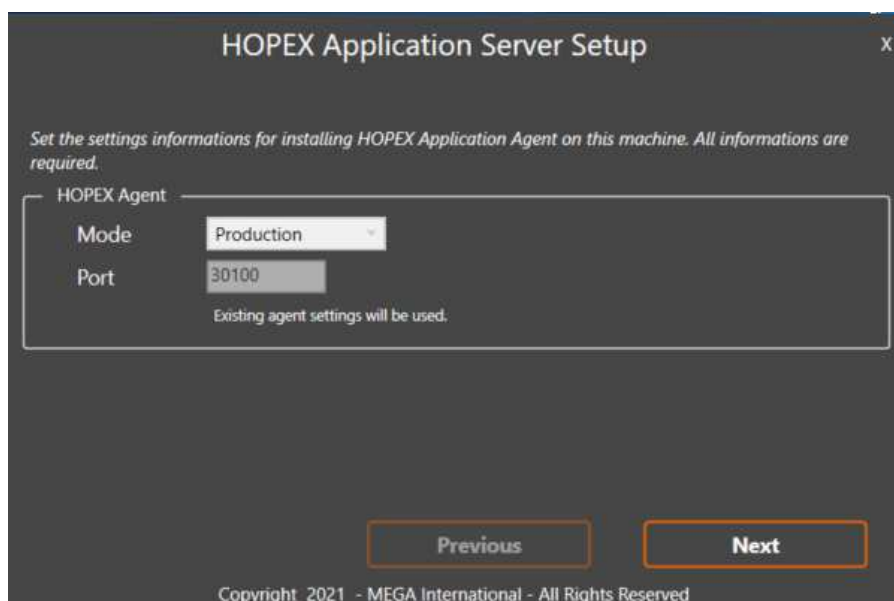
1. A file **has.setup.exe**.
2. A folder **.haspackages**.

Procedure:

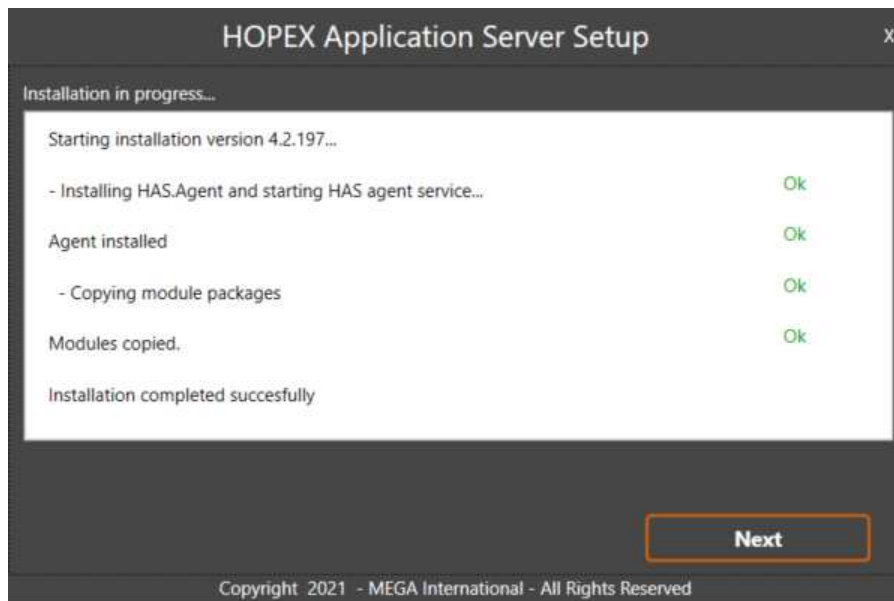
1. Run has.setup.exe as an administrator.
2. Check **Accept license** and click **Next**.



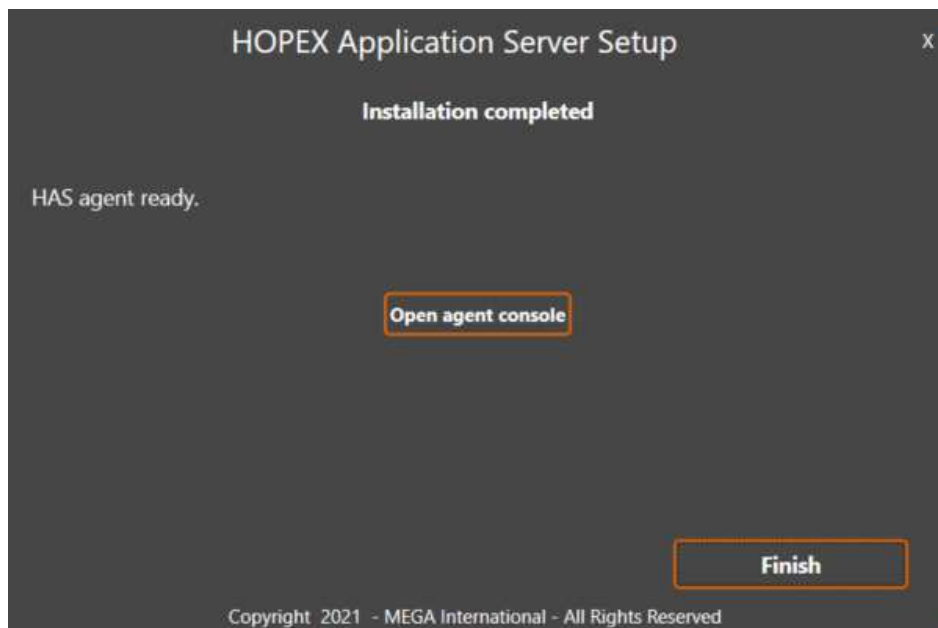
3. Keep existing settings for HOPEX Agent and click **Next**.



4. The package is installed.
A message is displayed such as 'installation completed successfully'.



5. Click **Next**.



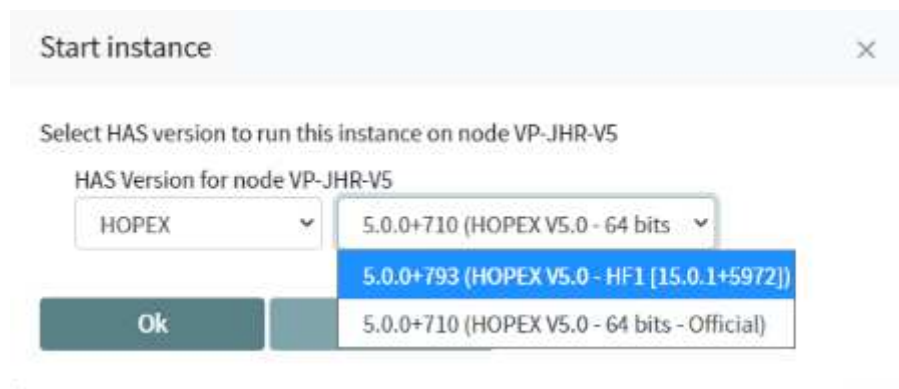
6. Click **Open agent console**.
7. In the left menu, select **Instances**.

8. Select the target instance, click **Stop** and confirm action
HAS instance stops.



Node	Port	Bundle	Version	Status	Actions
VP-JHR-V5	5002	HOPEX	5.0.0+710	Stopped	<div>Start</div> <div>Delete</div>

9. Select the target instance and click **Start**.
10. In the page 'Start instance', select carefully the target bundle (ex 5.0.0+793 (**HOPEX V5.0 HF1**[15.0.1.5972])) and click **OK**.
HAS instance starts.



Start instance

Select HAS version to run this instance on node VP-JHR-V5

HAS Version for node VP-JHR-V5

HOPEX

5.0.0+710 (HOPEX V5.0 - 64 bits)

5.0.0+793 (HOPEX V5.0 - HF1 [15.0.1+5972])

5.0.0+710 (HOPEX V5.0 - 64 bits - Official)

Ok

11. In the left menu, select **HAS Versions**.
12. You can delete previous programs (ex 5.0.0+698) if there is no associated instance by clicking on the dustbin icon.



Node	Bundle	Version name	Instances
VP-JHR-V5	HOPEX	5.0.0+698 (HOPEX V5.0 - 64 bits [15.0.0+5944])	0

13. **Open** HAS Console related to the target instance and check that all modules are loaded.

3. Upgrading an HOPEX module

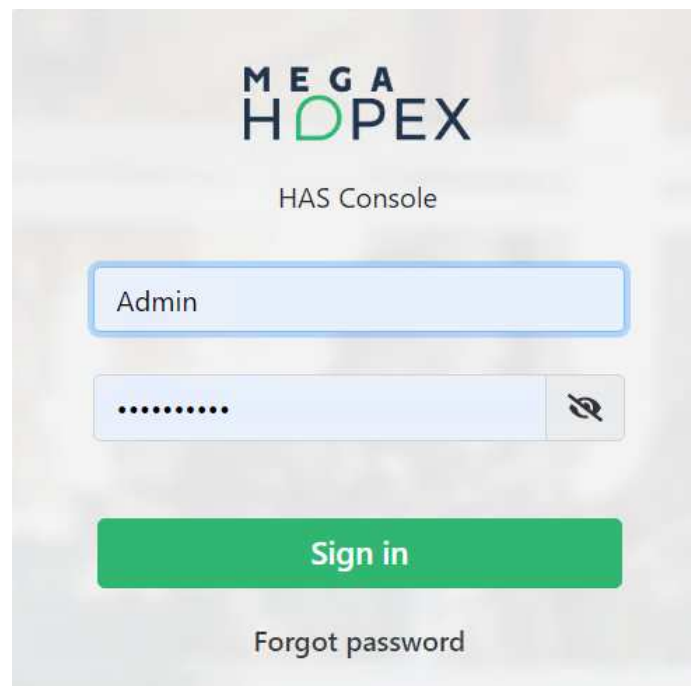
Pre-conditions:

- Identify the modules and related version to install (target modules).
Ex: module HOPEX Boldbi (dashboard.boldbi) Version: 15.0.0+XXXX
This information is usually provided by MEGA Technical Support.
- Identify the HAS instances involved.
Ex: preproduction instance <http://svr0101:5000/>
This information is provided by the project.
- Know the credentials for the HAS Console of this instance.
This information is provided by the project.
- Check that no user is connected to the HAS instance.

Procedure:

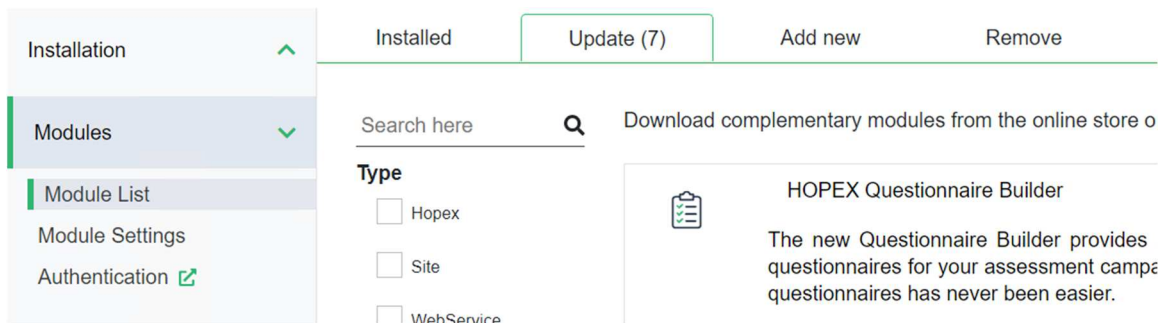
For each HAS instance:

1. Enter the url of the instance <http://svr0101:5000/>
2. Click **Open** for HAS Console.
3. Enter credentials and click **Sign in**.



4. In the left pane of HAS Console, **Modules** > **Module list**.
The list of modules installed is displayed (tab 'Installed').

5. Click on tab **Update**.



6. Browse the list of modules and select the target module.
ex HOPEX Boldbi
A page displays the history of versions.
7. Carefully select the target version and **click on the download icon** on the right.
Note that target version may not be the last version available.



Wait until the processing is complete.
The module is downloaded then deployed.

8. In the left pane of HAS Console, click **Cluster**.
A page displays the different module deployed.
9. Select the module updated (ex :module graphql.ide) and click **Start**.
Target version of module should be displayed.
ex: module HOPEX Boldbi version 15.0.0+XXXX.

Checking dependencies

If a module M1 depends on a module M2, the update of M2 may require updating also M1.

Once the HAS instance is restarted, the system check the dependencies of each module installed.

- If there is no issue with a dependency the module is loaded.
- If there is one issue with a dependency the module is disabled automatically.

Use the above procedure to update one or several modules.

Once all expected modules are updated, restart the HAS instance for the last time.
If there is no issue with a dependency, all the modules are loaded and displayed with a green checkmark.

4. Upgrading HOPEX data

Most changes apply to HOPEX programs. However, some changes apply to the systemdb repository. It is therefore necessary to update all HOPEX environments to benefit from all the changes and fixes. The procedure varies with the storage.

With HAS deployment, Windows Administration Console (**Administration.exe**), is installed in a subfolder of the HAS Instance: %programdata%\MEGA\Hopex Application Server\<instance port number>, ex: C:\ProgramData\MEGA\Hopex Application Server\5001

4.1. Pre-update

Unlike previous versions, Administration.exe cannot run if all processes and services are stopped.

To enable environment upgrade, it is required that:

- HAS Instance manager is started
- An HAS instance is created (with licence configured) and started.
- Module Hopex.Core is stopped
- No private workspace persists.

Procedure to stop module HOPEX Core Back-end V5.0 (hopex.core):

- Select HAS instance, ex <https://mymachine:5000>
- Open HAS Console and login
- In HAS console, display tab Cluster
- For module HOPEX Core Back-end V5.0 (hopex.core), select action Stop on the right.

4.2. Update procedure

Unlike previous versions, Administration.exe cannot run if all processes and services are stopped.

To enable environment upgrade, it is required that:

- HAS Instance manager is started.
- An HAS instance is created (with licence configured) and started.
- Module Hopex.Core is stopped

Stop module HOPEX Core Back-end V5.0 (hopex.core):

- Select HAS instance, ex <https://mymachine:5000>
- Open HAS Console and login
- In HAS console, display tab **Cluster**
- For module HOPEX Core Back-end V5.0 (**hopex.core**), select action Stop on the right.

Update HOPEX environment:

1. Start **Administration.exe**.
2. Select the environment to be upgraded.
3. R click > **Open**.
4. Login with the **System** identifier.
5. Select the target environment.
6. R click > **Environment automatic update**.
A wizard 'Environment Update Center' is displayed.
 - Read text, check '**I have taken note of the above test**' and click **Next**.
 - Keep the selected actions checked and click **Run**.
 - Wait until processing is complete.
7. Exit **Administration.exe**.

4.3. Post-update

- If you use data reading access management feature (ex-confidentiality), check that data reading access is compiled.
- Verify that environment is fully compiled (Metamodel, Technical Data and **Permissions**)
- In HAS Console, restart HAS Instance with the update version and check dependencies
- Test web login. No warning should be displayed.
- If you use batch automated processing (Administration API script), update HAS installation path in Windows registry.

If environment is not fully compiled

For each HOPEX environment:

1. Start **Administration.exe**.
2. Select the environment to be upgraded.
3. R click > **Open**.
4. Login with the **System** identifier.
5. Select the target environment.
6. R click > **Metamodel > Translate and Compile**.
 - Verify that checkbox **Compile Permissions...** is **unchecked**
 - Otherwise, check the **three checkboxes** below and click **Start** to compile
 - Compile Metamodel
 - Compile Technical Data
 - Compile Permissions (recommended in Production)
 - Wait until compilation process is completed.
7. Exit **Administration.exe**.

If you use batch automated processing (Administration API script)

Permissions to run PowerShell scripts are required.

For each HAS Instance:

- Browse the root folder of the HAS Instance
 - Ex: C:\ProgramData\MEGA\Hopex Application Server\5000
- Run the script HOPEX-regserver.ps1

5. FAQs

5.1.1. How to check that no user is connected to the HAS instance?

Check the list of workspaces in Administration.exe.
Use supervision console.

5.1.2. How to prevent a user from connecting to the HAS instance during hotfix installation?

You need to warn end-users.

5.1.3. I did not install the version I wanted to. How to restore the previous version of the module?


You need to download and install again the expected version of the module.

5.1.4. How to verify that no workspace exists in read/write mode?

Check the list of workspaces in Administration.exe.

5.1.5. Error Something went wrong. Module X with version YY is older than the current version ZZ. Deployment is ignored!

This means that the version selected cannot be installed since it is older than the current version. Only upgrade is possible, not downgrade.

Something went wrong 

Module hopex.core with version 901.5719.0 is older than the current version 902.5744.0. Deployment ignored.

Close

5.1.6. Error: Module mode constraints do not match current server mode Production

This means that the version selected cannot be installed since it is not compatible with the current installation.

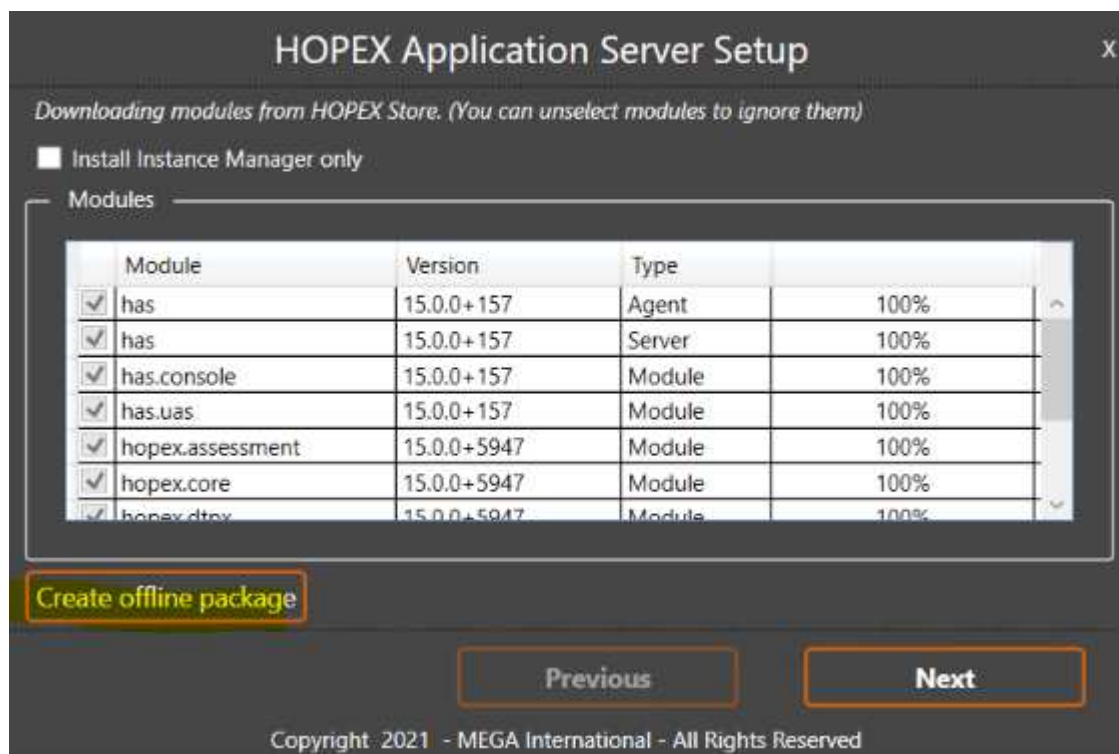


5.1.7. How to create an offline package?

You need an internal access to HOPEX Store

Run HAS installer, ex: Hopex.Application.Server-1.0.94.Setup.exe

Start installation as usual but click on 'Create offline package'



5.1.8. Unexpected error 'The Sql Server Client could not be found. ODBC Driver 17 for SQL Server may not be installed'

As said, ODBC Driver 17 for SQL Server is not installed. This is a technical requirement. Download and install ODBC Driver 17 for SQL Server.

Updating Virtual Reports

1. Introduction	3
2. Virtual Reports with Report Edition	3
2.1. Identifying the macro to edit	3
2.2. Updating the macro.....	3
3. Virtual reports without Report Edition	5
3.1. Updating the Property Page.....	5
3.2. Updating the macro.....	5
4. Finding my customized virtual reports	5
4.1. Finding Virtual reports with Report Edition	5
4.2. Finding Virtual reports without Report Edition.....	5
5. Updating Widgets based on a Tool	6
5.1. Finding Widgets based on a Tool	6
5.2. Updating the Property Page.....	7
5.3. Updating the Macro	7
6. Updating Widgets based on a Formatter	7
7. Updating Tiles based on a Tool	8
7.1. Finding Tiles based on a Tool	8
7.2. Updating the Property Page.....	8
7.3. Updating the Macro	8

1. Introduction

This document describes how to update existing virtual reports to use the new Report Tool.

This applies starting from Hopex V5.

2. Virtual Reports with Report Edition

2.1. Identifying the macro to edit

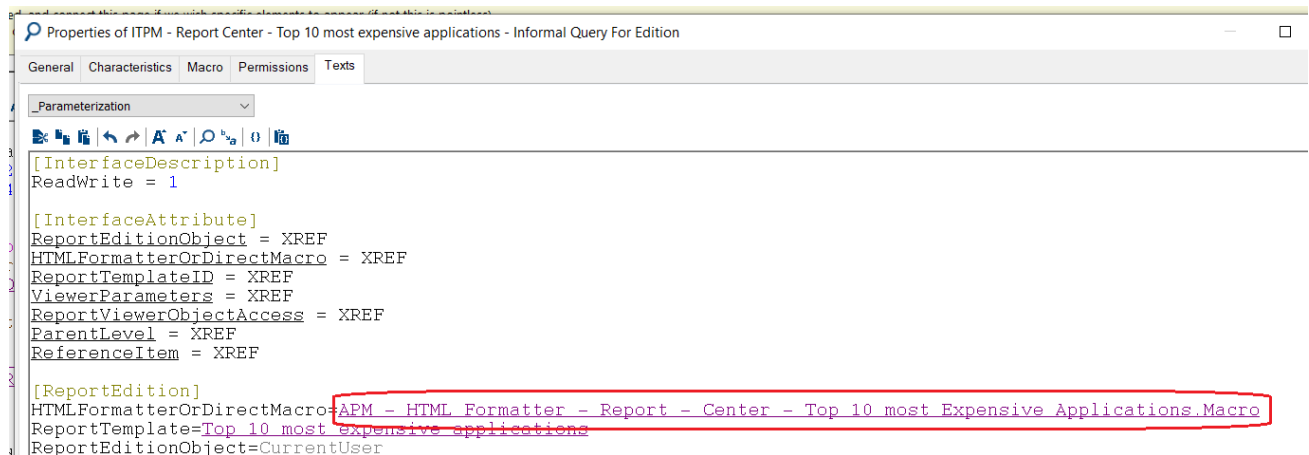
These reports are defined in Property Pages which define a specific informal query and use the Report Edition generic subpage:

```
[Template]
ParametersGroup=Group(Bar),Pos(Top),Name("")
technologyPortfolio = Item(Cost Nature),In(ParametersGroup),XRef(True)
Year = Item(Date),In(ParametersGroup),Mandatory(Yes),XRef(True)

refreshReport=Item(Refresh the report),In(ParametersGroup),Control(Button),Name(Refresh the report),Param(NoCall)

Map=Map(ITPM - Report Center - Top 10 most expensive applications - Informal Query For Edition)
Report=Item(Report Edition),From(Map),Control(SubPage),VClip(TopToBottom),HClip(LeftToRight),Param(Refresh=1)
```

The report formatter macro must be updated. It is defined in the informal query _Parameterization attribute:



2.2. Updating the macro

Perform the following two changes to this macro:

- After the report creation part, add the following code :

```

...

Set oAnalysisPlugin =
oRoot.CurrentEnvironment.GetMacro("~9MuFp4qmBD40[Analysis Plugin]")

...

Set oAnalysis = oAnalysisPlugin.newAnalysisFromXMLString(oRoot,
oXmlAnalysisBuilder.xmlAnalysis)

...

'Report tool parameterization
dim sUserData
sUserData = oGenerationContext.UserData
if sUserData <> "" then
    oAnalysis.setReportCmpId(oAnalysisPlugin.getReportCmpId(sUserData))
end if

```

- Remove the HTML Header and Body added to the string returned at the end of the Generate sub.

```

sout = sout & "<!DOCTYPE HTML PUBLIC ""-//W3C//DTD HTML 4.01
Transitional//EN""
""http://www.w3.org/TR/html4/loose.dtd""><html><head>" _

    & oRoot.CurrentEnvironment.GetMacro("~gu3rWUjw4D70[Html Complete
Analysis]").getCssAndJsReferences (oRoot, oGenerationContext) &
oAnalysisPlugin.getCssJs(oRoot,oGenerationContext) _

    & "</head><body class=""nae"">" _

    & oAnalysis.Generate("HTML",oGenerationContext,null) _

    & "</body></html>"

```

You get now :

```
sout = oAnalysis.Generate("HTML",oGenerationContext,null)
```

3. Virtual reports without Report Edition

3.1. Updating the Property Page

The MetaPropertyPage or Macro which defines the viewer control must be updated. It contains this kind of definition:

```
myReport=Item(~H(IbRVABTP9B[MyReportMacro] ,From(Map)  
 ,Control(Viewer),Param(DirectMacro)
```

- The new Report control must be used instead of Viewer, so the previous line should be changed to:

```
myReport=Item(~H(IbRVABTP9B[MyReportMacro] ,From(Map) ,Control(Report)  
 ,Param(DirectMacro)
```

Warning: MyReportMacro must be a **Macro** and not an **HTMLFormatter**, it is therefore mandatory to define a **DirectMacro**. If you have defined an **HTMLFormatter**, you can use its existing macro.

3.2. Updating the macro

Proceed as described section 2.2 Updating the macro.

4. Finding my customized virtual reports

4.1. Finding Virtual reports with Report Edition

to get all specific informal queries, use the following query:

```
Select [Query] Where [_Parameterization] Like "#HTMLFormatterOrDirectMacro#" And [Creator] Not = "j6L3BsG8kW60"
```

Then, modify the HTML Formatter macro or Direct Macro as described section 2.2 Updating the macro.

4.2. Finding Virtual reports without Report Edition

They can be defined in a MetaPropertyPage or in a Macro defining a MetaPropertyPage or in a custom JAVA project defining a MetaPropertyPage.

To find them, use the following queries:

```
Select [MetaPropertyPage] Where [_Parameterization] Like "#control(viewer)#"
And [Creator] Not = "j6L3BsG8kW60"
```

```
Select [Macro] Where [VB Script] Like "#control(viewer)#" And [Creator] Not =
"j6L3BsG8kW60"
```

And find occurrences of the following string in custom JAVA files:

Control(Viewer)

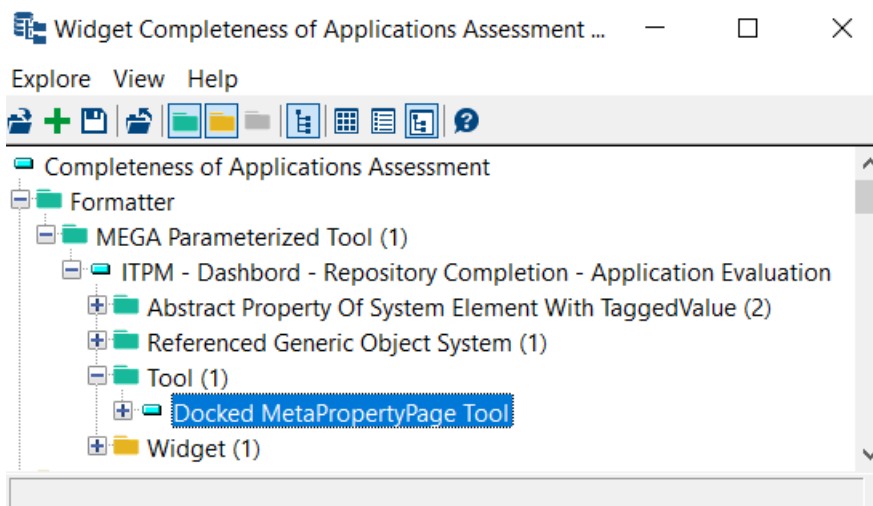
Then, modify the Page as described in section 3.1 [Updating the Property Page](#) to use the new Control **Report** and the Direct Macro used by this Control as described section 3.2 [Updating the macro](#).

5. Updating Widgets based on a Tool

5.1. Finding Widgets based on a Tool

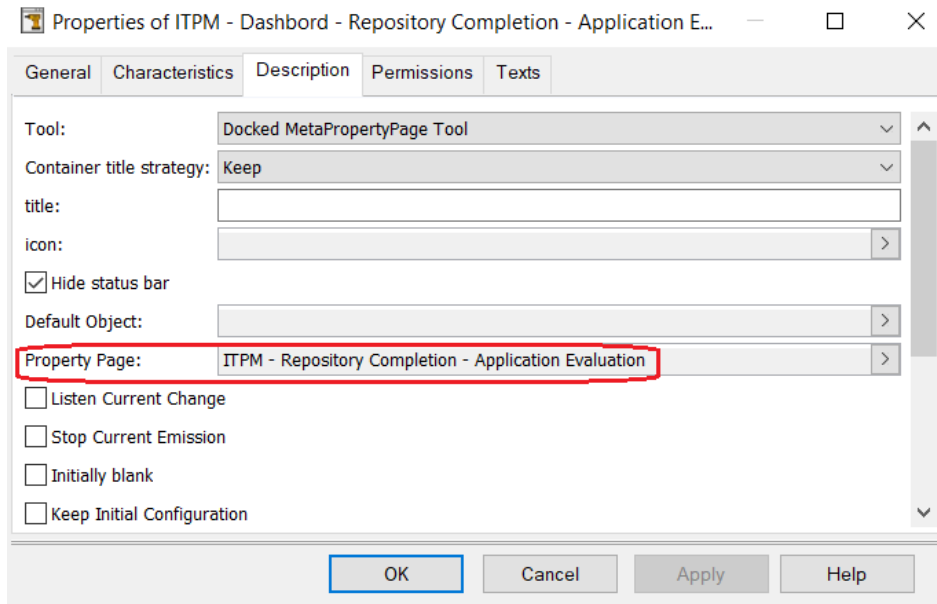
Updatable Widgets use a MEGA Parameterized Tool as Formatter. This Tool is a Docked MetaPropertyPage Tool. The viewer control is defined in the Parameterized Tool Property Page.

For example:



5.2. Updating the Property Page

The property page to update is defined in the Tool Description page:



It must be updated as described section 3.1 Updating the Property Page.

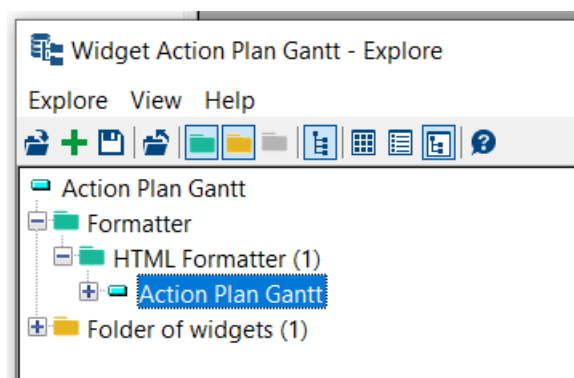
5.3. Updating the Macro

The report formatter macro defined in this Property Page must be updated as described section 2.2 Updating the macro.

6. Updating Widgets based on a Formatter

These widgets define an HTML Formatter.

For example:



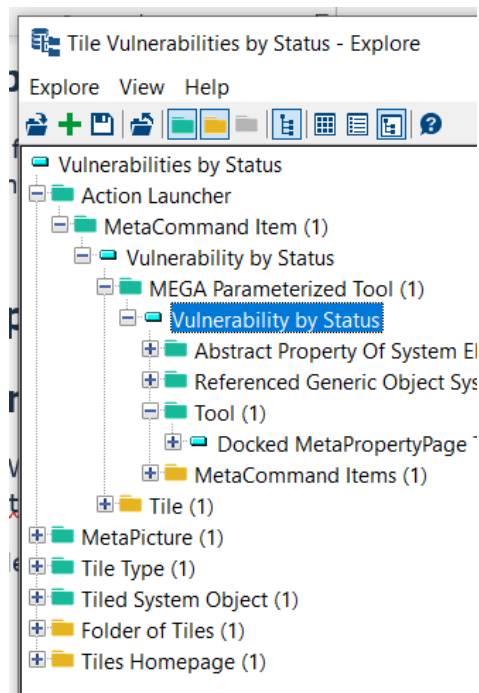
This formatter should be removed. It must be replaced by a MEGA Parameterized Tool using the Docked MetaPropertyPage Tool. The MetaPropertyPage must use the new Report control as described section 3.1 Updating the Property Page. The HTML Formatter macro can be reused but only as a DirectMacro. It must also be modified as described section 3.2 Updating the macro.

7. Updating Tiles based on a Tool

7.1. Finding Tiles based on a Tool

Updatable Tiles define a MEGA Parameterized Tool in the hierarchy of their definition. This Tool is a Docked MetaPropertyPage Tool. The viewer control is defined in the Parameterized Tool Property Page.

For example:



7.2. Updating the Property Page

Proceed as described section 3.1 Updating the Property Page.

7.3. Updating the Macro

The report formatter macro defined in this Property Page must be updated as in section 2.2 Updating the macro.