

Product Upgrade Overview

Overview

The document is intended as a high-level guide to upgrading Blue Prism®. There is no single way to upgrade and this document should not be treated as rigid instruction, rather it should be seen as an overview of potential options and strategies.

Planning

Needless to say, upgrading software in an Enterprise level Production environment is not a task that should be undertaken lightly. A Blue Prism environment is comprised of more than just the Blue Prism software, and planning can be broken down into the following stages.

- Upgrade Scale
 - How many processes are there?
 - How many machines will need to be upgraded?
- Upgrade Strategy
 - Infrastructure – can the current infrastructure support the upgrade?
 - Regression testing – when and where will it be done?
 - Sequence – which processes will be upgraded first?
 - Timing – are there any maintenance windows that can be used?
- Documentation
 - Read the Release Notes of every version of Blue Prism since the current version.
 - Make sure the architecture documentation is up to date before and after the upgrade.
 - Review delivery documentation, in particular test scripts.
- Operational Impact
 - Which processes are mission-critical or high-risk?
 - What will the BAU workload be during the upgrade?
 - What commitment to the Business has been made?
- New Functionality
 - Is the intention to introduce new functionality to processes during the upgrade?
 - Or is it preferable to introduce change after the upgrade is complete?

Execution

Executing the upgrade is a relatively simple procedure and is described in the Release Notes of every version of Blue Prism. At a very high level, the steps are as follows.

- Stop all activity
- Back up
- Stop all BP instances
- Upgrade the DB
- Upgrade BP
- Restart

Regression Testing

- Regression testing should focus on the interaction with target systems and services.
- Follow the existing test approach starting from the pre-Acceptance, 'attended' phase.
- Reuse existing test scripts to 'sign off' processes again.

Testing Environment

- Create temporary copies of existing databases to create a testing sandbox.
- Where possible, create a parallel testing environment so that Production remains operational.
- Where desirable, maintain a 'Route to Live' for inflight projects to continue.
- Create rollout plan but also a rollback plan.
- Identify the upgrade participants, the PMs, SMEs, testers, developers, IT and the DBAs.