celonis

UPDATE GUIDE

Version 1.7

Corresponding Software Version

Celonis 4.4

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REVISION HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY OF REVISIONS MADE
1.1	FEB 16, 2017	Application Version 4.2
1.6	FEB 23, 2018	Updated version for application version 4.3
1.7	MAI 05, 2018	Updated version for application version 4.4

INTRODUCTION

ABOUT THIS GUIDE

Celonis is a powerful software for retrieving, visualizing and analyzing real as-is business processes from transactional data. It provides users with the possibility to create and share comprehensive process analyses giving them full transparency about the business processes at hand.

This guide provides a step-by-step instruction on how to update Celonis or apply a patch downloaded from my.celonis.de. An overview of the changes and new features can be found in the release notes.

TARGET AUDIENCE

This guide covers all relevant technical information about correctly updating Celonis environments and is meant to be consulted by the following target audiences:

- System Administrators
- Support Personnel
- Technical Staff

LIST OF ABBREVIATIONS

ABBREVIATION	EXPLANATION
ADFS	Active Directory Federation Service
ID	Identifier
OS	Operating System
SAML	Security Assertion Markup Language
SSO	Single Sign-On
URL	Uniform Resource Locator
ZIP	Zipper (Archive File Format)

SOFTWARE CHANGE MANAGEMENT

New releases and support packages are announced on my.celonis.de and can be retrieved from there. Regardless of the type of patch, you will be provided with a full installer file. The procedure for updating an installation is described in the next chapter: SOFTWARE UPDATE PROCEDURE. For detailed installation instructions, please refer to the Celonis Installation Guide to find the latest application prerequisites. For detailed operating instructions, please refer to the Celonis Operation Guide to understand the Celonis application in depth.

Please note:

- A Celonis Patch is a resolution or fix for one specific issue
- A Celonis Service Pack resolves multiple issues
- Patches or Service Packs may be available in advance, if critical
- A Celonis Release is a new version of the software, including new features

When you want to promote configurations and artifacts to production, there is a built-in export/import mechanism for all transportable artifacts in the web interface of Celonis; for usage instructions, please refer to the Celonis Manual. Technical configurations can be copied on a file level.

SOFTWARE UPDATE PROCEDURE

LATEST CELONIS VERSION

The Celonis software is shipped as an installer. The installer type depends on the Operating System it is going to be installed on. Verify the correct Celonis software version before you deploy any update. The latest Celonis software version can be downloaded from my.celonis.de.

The general update procedure is described below, however there may be several other instructions specific to a certain release. If any specific instructions should apply, they will be shipped out together with the release.

There will be a short downtime of the Celonis Application for the duration of steps 2 to 6.

INTEGRITY OF CELONIS CONFIGURATION FILES

Celonis updates may require changes on configuration files. The following configuration files exist:

- "config.properties"
- "config-custom.properties"
- "config-custom.properties.sample"

The configuration files "config.properties" and "config-custom.properties.sample" will be overwritten by the new version. Your custom configuration file "config-custom.properties" remains unchanged. Please check the new "config-custom.properties.sample" file for changed and updated parameters.

SAML configuration changes with version 4.3

If you are utilizing Single Sign-On (SSO) with ADFS (SAML authentication), on a version earlier than 4.3, it is mandatory to update the SAML configuration in the "config-custom.properties" file. The parameters "saml.url.scheme", "saml.url.serverName", "saml.url.serverPort", and "server.url" must be added to your SAML configuration. For details on how to set these parameters refer to "Celonis ADFS Setup Guide 1.6".

BACKUP OF THE CELONIS APPLICATION AND CONFIGURATION STORE

Step 1: Stop the Celonis service

- Windows: Start the Celonis Service console or Windows services.msc and stop the service.
- Linux: Execute the "stop.sh" script.

Verify that the Celonis processes have been terminated successfully.

- Windows: Investigate the currently running processes using the Task Manager
- Linux: Investigate the currently running processes by the Linux Process Table

Step 2: Create a backup of the Celonis application and application data:

Create a backup of the following files and folders:

- <installPath>/component_configuration
- appfiles/appdata.* (on Windows), root/appdata.* (on Linux)
- <installPath>/start.sh, <installPath>/stop.sh

Optional: Perform a file system level backup of the installation and appfiles folder using customer specific backup solution (e.g. Tivoli Storage Manager, Symantec/Veritas Backup Exec, etc.).

In case you are already using the Celonis Configuration Store on an external database system, create a backup of the Celonis Configuration Store.

In case you are using the integrated Celonis Configuration Store powered by HSQLDB, consider migrating the Celonis Configuration Store to an external database system. For more information, please refer to the Celonis Configuration Store Setup Guide.

Step 3: Backup additional files

Verify to have a recent backup of all files, which you might have modified (e.g. the default Java keystore/truststore file "cacerts" in "jre/lib/security") or added additionally (e.g. HANA JDBC driver in appfiles/app/WEB-INF/lib (on Windows), root/app/WEB-INF/lib (on Linux)) as they may be overridden by an update.

GENERAL UPDATE PROCEDURE

Step 1: Download the new release from my.celonis.de

Download the correct installer for your host OS. If you cannot find the installer matching your OS and version, please contact the Celonis Servicedesk.

Step 2: Stop the Celonis service

- Windows: Start the Celonis Service console and stop the service.
- Linux: Execute the "stop.sh" script.

Verify that the Celonis processes have been terminated successfully:

- Windows: Investigate the currently running processes using the Task Manager
- Linux: Investigate the currently running process by the Linux Process Table

Make sure to close any other applications afterwards (esp. the Celonis Service console on Windows and any Windows Explorer windows or Linux command line locations inside the installation/application path).

Step 2a: Rotate logfiles (Linux only – optional)

On Linux systems, there is no automatic log file rotation for the files stdout and stderr. We recommend performing a manual rotation by moving the files stderr and stdout to e.g. stderr.0 and stdout.0 respectively, such that after the update the files stderr and stdout can be written to from scratch. Consider compressing the rotated files (stderr.0, stdout.0). In case such a rotated file already exists, consider deleting or renaming these old log files.

Step 3: Run the Celonis Installer

On Windows, the installer will recognize your current setup and keep your system configuration settings. The installer will automatically update Celonis to the latest version.

Continue only if the installation finished successfully.

On Linux, you will have to re-enter the initial configuration parameters even for an update.

Step 4: Start the Celonis service

- Windows: Start the Celonis Service console and start the service.
- Linux: Re-apply your custom changes to the "start.sh" and "stop.sh" scripts. Execute the "start.sh" script.

Verify that the Celonis processes have been started successfully:

- Windows: Investigate the currently running processes using the Task Manager
- Linux: Investigate the currently running process by the Linux Process Table

Step 5: Verify that logs files are written

Login to the Celonis application. Verify if the log files are written:

- Windows: Log-files are separated per service start and can be found in "<installPath>\logs".
- Linux: Log-files are combined in "<installPath>/logs".

Step 6: Verify the Celonis release ID

Login to the Celonis application and access the "About" page in the bottom left corner of the start screen. Validate that the displayed version ID equals the new release.

If you want to check the version of Celonis while the software is not running, you can do so by viewing the "config.properties" file in the root directory of the Celonis application (parameter "application.version").

PERFORM CLEAN-UP OPERATIONS

1. We recommend keeping at least the latest backup archive
2. Delete obsolete backup archives
3. Verify and update the integrity of Celonis configuration files

SUPPORT DESK MANAGEMENT

To contact Celonis support, you have the following possibilities:

Hotline: +49 (0)89 416 159 677

Email: servicedesk@celonis.de

Support-Portal: https://servicedesk.celonis.com

Please include at least the following items in your issue description:

- Used browser including version (e.g. Google Chrome Version 64.0)
- Installation which you are trying to access (in case there is e.g. Dev and Prod)
- URL used to access the system (sometimes, there can be more than one URL to reach a single installation. This will also help to identify the installation you are trying to access)
- User name used to logon
- Screenshot of the error message/situation
- Log files of the application (if accessible on the server)

For additional information please refer to "Service Description For Celonis Support Services" available on the official Celonis website.

REFERENCES

- Celonis Installation Guide
- Celonis Operation Guide
- Celonis Manual
- Celonis Release Notes
- Celonis ADFS Setup Guide 1.6
- Celonis Migration Store Setup Guide