

Mail & Deploy Upgrade Guide

Version 3.3.0

Introduction

This upgrade guide describes which manual steps need to be taken to successfully upgrade Mail & Deploy to version 3.3.0. We had to make some breaking changes to support more modern forms to connect to SharePoint Online and Dropbox.

Important: You need to make the changes described in this document after migrating to Mail & Deploy Release 3.3.0.

Datasource Caches

Please make sure that you rebuild the caches of all Qlik Sense datasources after upgrading to Release 3.3.0 of Mail & Deploy.

Qlik Sense Table Styling

Mail & Deploy Release 3.3.0 applies updates to Fonts used by more recent Qlik Sense versions and automatically applies them to table elements used in reports unless you have disabled font name styling or applied a specific font in your table element styles. In any case it's a good idea to check report outputs after the upgrade and make any adaptations as required.

Upload Content To Dropbox Actions

If you have any task that uses an *Upload Content To Dropbox* action, you need to perform the following steps for each of these tasks:

1. Open the task that contains an *Upload Content To Dropbox* action. For every action of that type, perform the following steps:
 - a. Open the action.
 - b. Click the *Link Dropbox Account* button.
 - c. A new browser tab will open where you must enter credentials of a Dropbox account and confirm that you want to allow Mail & Deploy to upload content to that account. At the end of that process an authorization code will be displayed.
 - d. Copy the authorization code and paste it into Mail & Deploy.
 - e. Click *Confirm Authorization Code*.
 - f. Save the *Upload Content To Dropbox* action and the task.
2. Test the task and check whether files are uploaded correctly (and also whether they are uploaded into the correct Dropbox folders).

Upload Content To SharePoint Actions

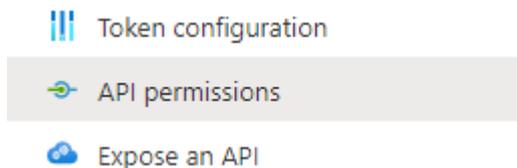
If you have any task that uses an *Upload Content To SharePoint* action which uploads content to a SharePoint Online instance, you need to perform the following steps:

SharePoint Online Preparation

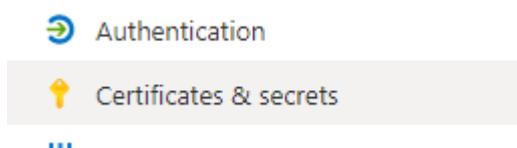
1. Logon to your Azure portal.
2. Click *App registrations*.



3. If you haven't yet created an app for Mail & Deploy click *New registration* (if you already have an app for Mail & Deploy you can use the *Client ID* and *Client Secret* of that app and only need to add additional permissions to the app as you can see below starting with step 8).
4. Enter a name for the new app and keep all other options default (no redirect URI is required).
5. Remember the *Client ID* and *Tenant ID* (we will need them later).
6. Click *API permissions*.



7. Make sure that the following MS Graph permissions are granted:
 - a. Files.ReadWrite.All
 - b. Sites.ReadWrite.All
8. Click *Certificates & secrets*.



9. Click *New client secret*, create the new secret and remember it (we will need it later).

Mail & Deploy Configuration

1. Open the task that contains an *Upload Content To SharePoint* action that uploads content to a SharePoint Online instance. For every action of that type, perform the following steps:
 - a. Open the action.
 - b. Set the *Tenant ID*, *Client ID*, and *Client Secret* remembered from the Azure configuration (see above).
 - c. Refresh the list of available sites.
 - d. Select the SharePoint Site you want to upload content to.
 - e. Make sure that the *Remote Path* is correct.
 - f. Save the action and the task.
2. Test the task and check that it works and uploads content to the correct locations/folders.
3. Repeat from step 1 for every other task containing an *Upload Content To SharePoint* action that uploads content to a SharePoint Online instance.