

POWER TO RUN YOUR BUSINESS



CRM

Sage CRM 6.0

Upgrade Guide

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Chapter 1

Introduction

This guide is for Sage CRM System Administrators and Sage CRM Certified Consultants.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, all functionality covered is also relevant to Sage Accpac CRM and Softline Accpac CRM.

We assume that you are an experienced Sage CRM System Administrator or Certified Consultant, and are familiar with:

- § The administration tasks covered in the Sage CRM System Administrator Guide.
- § Backup and restoration procedures for SQL databases, or whatever database type you are working with.

Introduction

This guide can be used when performing an upgrade from Sage CRM versions 5.7 or 5.8 to version 6.0. **Note:** If you are upgrading from CRM version 5.6 to 6.0, you will first have to upgrade to version 5.7 or 5.8. Please refer to the *Sage CRM 5.8 Upgrade Guide* for further information.

Before beginning an upgrade, you should note the following:

- § When upgrading from CRM versions 5.7 or 5.8 to 6.0, users require only an upgrade key.
- § This guide can be used with all types of upgrades, including Sage CRM with non-standard functionality, such as EIS. When performing a Solo upgrade, you should also consult the *Sage CRM 6.0 Solo Guide* for specific instructions on upgrading Solo Client.
- § This guide can be used when upgrading CRM with all database types. For information on backing up and restoring specific database types, please consult the IT Administrator at the customer site, or the relevant database documentation.
- § The Sage Support Group is available to troubleshoot upgrade issues remotely. Depending on factors such as the size of an existing installation, the number of existing customizations, and the number of users, the Sage Professional Services Group (PSG) or a Sage Business Partner may sometimes be directly involved with some aspect of an upgrade at a

customer site. Such consultancy is billable and may include tasks such as running a trial upgrade, running a live upgrade, post-upgrade testing, and Administrator or User training on the upgraded software.

Recommended Steps in the Upgrade Process

A poorly implemented upgrade can cause downtime at a customer site. However, if an upgrade is well planned and executed, problems can be identified early and solved without causing any disruption to the customer site.

To help avoid some of the problems associated with poor upgrades, it is recommended that you perform the following steps when upgrading from Sage CRM version 5.7 or 5.8 to version 6.0:

- § Create a manual backup of the CRM program files, the registry, and the database.
- § Set up a test environment that mimics the live environment as closely as possible.
- § Perform a test upgrade on the test environment.
- § Test the test upgrade. This is the best time to find potential problems relating to both regularly used and customized functionality.
- § When you are happy with the results of the test upgrade, perform the live upgrade.
- § Sanity check the live upgrade. A full system test should not be required at this stage as potential issues should already have been isolated and solved during earlier testing on the trial upgrade.

This guide is intended to take you through the requirements for each of these steps.

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
New File Structures	New file structures in Sage CRM 5.8 and 6.0 that affect upgrades.
Manual Backup	Procedures for manually backing up the database, registry, and program files.
Running a Test Upgrade	Requirements for setting up a test environment and procedures for running a test upgrade.

The Upgrade Install Shield	How to perform and test an upgrade.
Restoring a Live Environment	How to restore a live environment in the event of a failed upgrade.
Troubleshooting	Advice on reviewing the Upgrade Log.
Upgrading Multi-Server CRM	How to upgrade a multi-server CRM environment.
Upgrade Checklist	A list of key milestones in the upgrade process.

Chapter 2

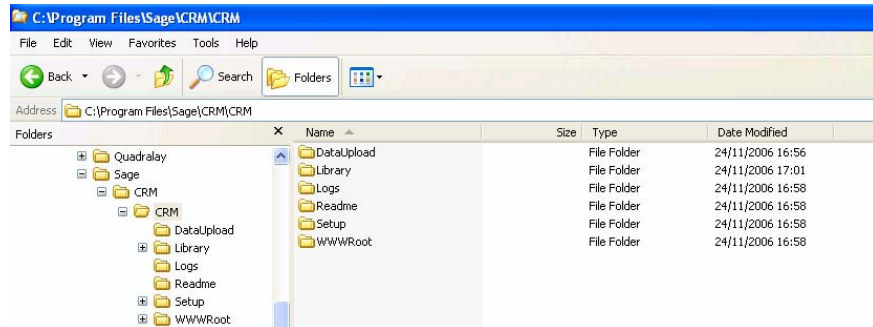
New File Structures

In this chapter you will learn about:

- § The new install location.
- § The reorganized 5.8 and 6.0 program files structure.
- § The new install location for CRM services.

New Install Location

In version 5.7, CRM files were installed to `C:\inetpub\wwwroot\<install name>` by default. In versions 5.8 and 6.0, CRM files are installed to `..\Program Files\Sage\CRM\<install name>`. When you upgrade to CRM version 5.8 or 6.0 from a previous version, the version 5.8 or 6.0 software is installed to the new install location.



New CRM Install Location

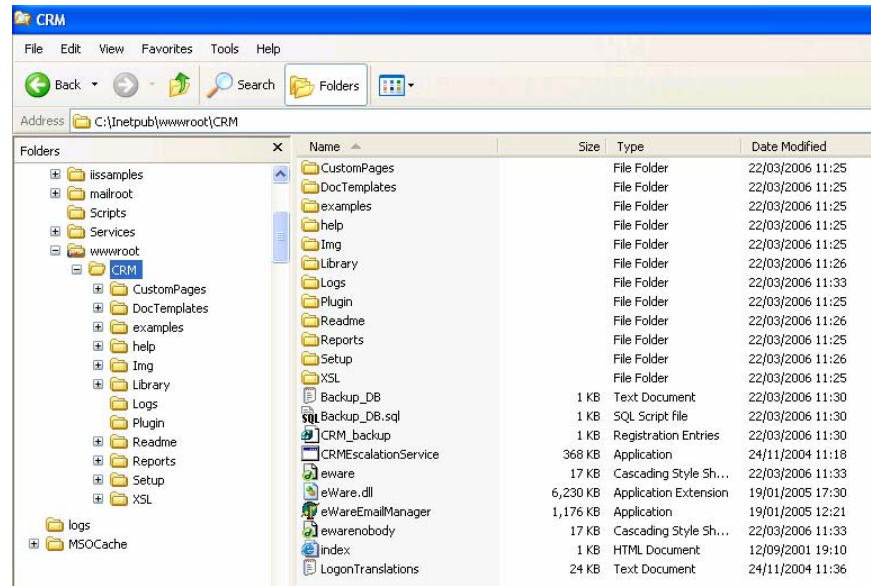
Generally, web applications are installed by default to `C:\inetpub`. This install location is widely known, so it can leave web applications vulnerable to automated random web server attacks. These attacks generally do not target a specific system, and will generally assume that the webroot is the default, `C:\inetpub\wwwroot`. Therefore changing the default install location of the CRM program files from `C:\inetpub\wwwroot` will enhance the security of the CRM application.

When upgrading from CRM version 5.7, the old directories and program files are retained as a backup in `C:\inetpub\wwwroot\<install name>`. Some files, such as custom pages, are copied from here for inclusion with the CRM 6.0 upgrade files at the new install location.

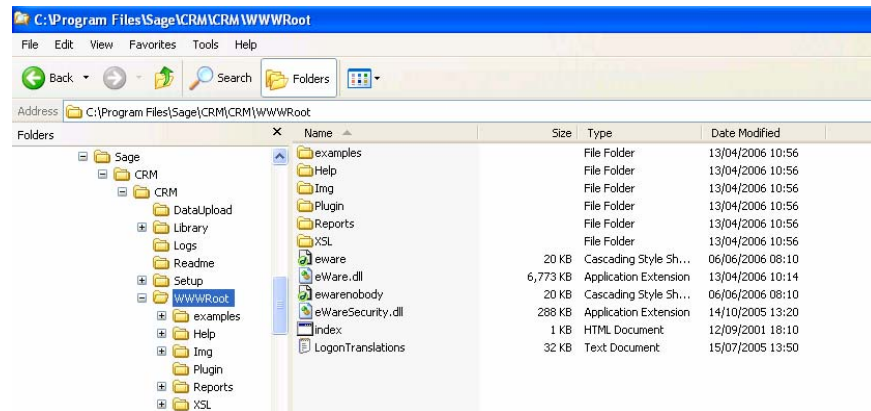
When upgrading from CRM version 5.8, ensure that you select the Backup Existing Copy Of The Database, Program Files, and Registry option on the 6.0 install shield in order to backup the 5.8 system.

Reorganized Program Files Directory

In version 5.8 and 6.0, the CRM install directories have been reorganized so that fewer folders are exposed under the install folder.



CRM 5.7 Install Directory

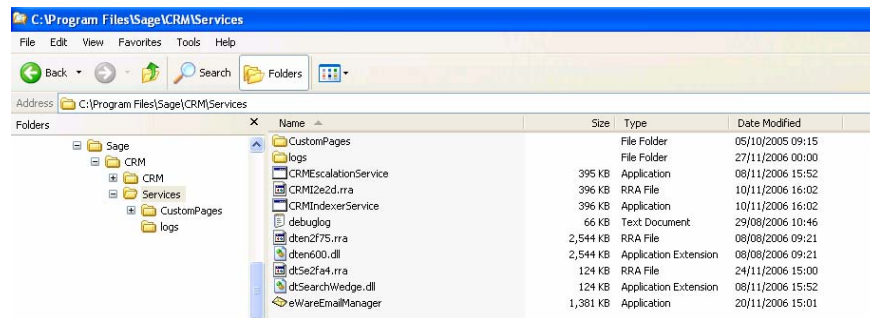


CRM 6.0 Install Directory

New Location for CRM Services

In CRM version 5.7, both E-mail Manager and the Escalation Service were installed to C:\inetpub\wwwroot\

In CRM versions 5.8 and 6.0, the E-mail Manager and Escalation Services are installed to ..\Program Files\Sage\CRM\Services.



New CRM Services Install Location

Now you can...

- § Identify the new install location.
- § Understand the reorganized 5.8 and 6.0 program files structure.
- § Identify the new install location for CRM services.

Chapter 3

Manual Backup

In this chapter you will learn about:

- § Why you should perform manual backups.
- § Backing up the database.
- § Backing up the registry.
- § Backing up program files.

Why Perform Manual Backups?

When performing an upgrade, you are offered the option to have the system make an automatic backup of the database and registry. However, it is recommended that you also perform manual backups of the database, registry, and program files before beginning any work on an upgrade. A manual backup is important because it allows you to:

- § Preserve a complete set of system, database, and registry files that can be stored completely independently of the upgrade environment, thus providing added security against data loss during the upgrade procedure.
- § Restore the customer's environment in-house, allowing you to create a mirror image of the customer's existing CRM environment. You can then carry out the upgrade procedure and post upgrade testing in-house, or on a test server at the customer site.

Backing up the Database

To back up the CRM database manually:

1. Decide on a location in which to save your backup files and ensure that you have sufficient space to do so.
2. Open the Database Administrator and save the database files to the backup folder.
3. Zip up the database backup files to save space.
4. Delete the unzipped database backup file.

Note: If you experience any difficulties when backing up the database, you should contact the IT Administrator at the customer site.

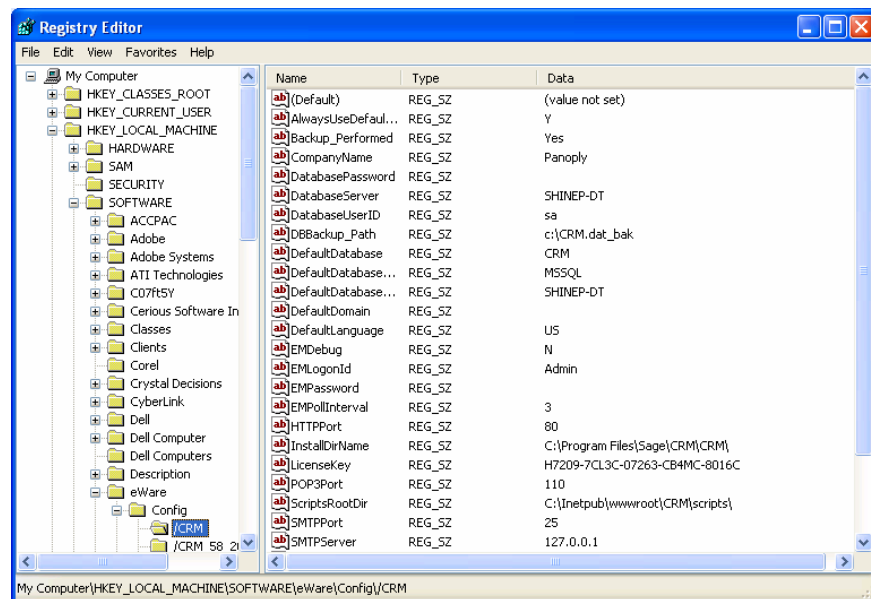
Backing up the Registry

To back up the registry manually:

1. Decide on a location in which to save your backup files and ensure that you have sufficient space to do so.
2. From the desktop on the Web Server, open Start | Run, and type **Regedit** in the Run dialog box.
3. Click OK.

The Registry Editor is opened.

4. Navigate to
HKEY_LOCAL_MACHINE\SOFTWARE\eWare\Config**<Install Name>**



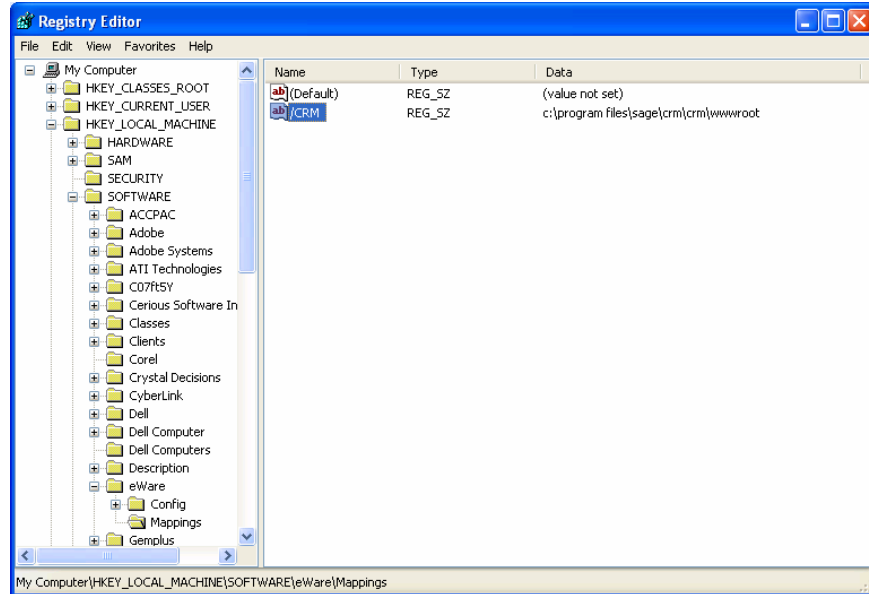
Registry Editor

5. Select File | Export.

The Export Registry File dialog box is displayed.

6. Type a file name in the File Name field and browse to your backup location.
7. Select the Save button.

8. In the Registry Editor, navigate to HKEY_LOCAL_MACHINE\SOFTWARE\eWare\Mappings.
9. Select the file that corresponds to the install you are upgrading.



Registry Editor – Mappings folder

10. Select File | Export.
- The Export Registry File dialog box is displayed.
11. Type a file name in the File Name field and browse to your backup location.
 12. Select the Save button.

Backing up Program Files

To back up Sage CRM program files manually:

1. Decide on a location in which to save your backup files and ensure that you have sufficient space to do so.
2. Browse to the Sage CRM 5.7 or 5.8 install files. By default, 5.7 files are installed to C:\inetpub\wwwroot\- 3. Create a zip file containing the install name folder and all sub-folders.
- 4. Save the zip file to your backup location.

Now you can...

- § Identify why you should perform manual backups.
- § Backup the database.
- § Backup the registry.
- § Backup program files.

Chapter 4

Running a Test Upgrade

In this chapter you will learn about:

- § Why you should set up a test environment.
- § Test upgrade prerequisites.
- § Installing backups to the test environment.
- § Performing a test upgrade.
- § Reviewing upgrade logs.
- § Testing a test upgrade.

Why Set up a Test Environment?

A test environment is an integral part of the Sage CRM upgrade procedure. The test environment allows the Sage CRM consultant to carry out trial runs of the upgrade procedure. If errors are found during the upgrade procedure they can be dealt with on the test environment. The test environment will be useful for ensuring that an upgraded system has been tested satisfactorily, and particularly for performing crucial post-upgrade system testing around upgraded advanced customizations, regularly used functionality, and data integrity in a controlled, non-live environment.

A test environment minimizes the likelihood of downtime once the live upgrade takes place.

Ideally, the test environment should mirror the production environment. While this may not always be possible, it should be noted that the accuracy of the test results will decrease as the test environment diverges from the live environment.

Test Upgrade Prerequisites

Licensing

A separate license key will be required for the test install. Your local Sage Op-Co can provide you with a trial license key free of charge. This key can be made to mimic the live license key functionality exactly, and it should include EIS. It will expire three months after installation.

Software Installation

To mirror the live environment successfully, Microsoft IIS, database management software (for example, SQL Server, DB2, or Oracle), and a clean CRM install (of the existing version) must be installed on the test server. The current live database, the live registry, and the program files must then be restored to the test environment. Refer to “Restoring Backups to the Test Environment” in this chapter for more details.

All third party software that Sage CRM is using or with which it is integrated must be installed on the test environment. This may include ACCPAC Advantage Series, ACCPAC Pro Series, Fax Serve, Crystal Reports, CRM Email Management, and CRM Escalation Service.

Note: The test environment should not reside on the same server as the live Sage CRM Web Server or SQL Server, as variables added into a production environment increase the end-user’s chance of downtime. For example, if IIS is required to be reset on the test Web server, and the client is running Sage CRM on the same server, then the production system will be impacted.

Baseline Testing

Once you have set up your test environment, you should perform some quick tests to ensure that it is functioning as an exact mirror of the live environment. These tests should focus on the most commonly used CRM functionality and components. For example, if you generate reports of a particular type on a daily basis, you should test the exact same procedure on the test environment. If the test environment is at the customer site, it may be useful to have some CRM users perform the tasks they do regularly on the test environment.

It is not recommended that you spend a lot of time testing functionality that is never used by the customer.

If you are testing an upgrade of Solo Client on the test environment, please see the *Sage CRM 6.0 Solo Guide* for additional information on performing a Solo upgrade.

Script Customizations

If the client’s license includes Enterprise Integration Server (EIS), any changes to the Sage CRM product can be scripted into an .es file. To ensure that any customizations made in the test environment can be carried across to the upgraded live environment, it is recommended that the test license include EIS.

Installing Backups to the Test Environment

Before performing a test upgrade, you must first install the backup files to the test environment to ensure that the test environment mirrors the live environment.

To install backups to the test environment:

1. Set up a trial install of the current version of CRM. For example, if the client currently uses CRM version 5.8, install version 5.8 on the test environment.

The trial key used must have the same number of users and the same optional functionality as the key used in the live environment.

2. Stop IIS.
3. Restore the database backup that you have taken from the live environment. Refer to “Restoring the Database Backup” in Chapter 6 of this guide for more details.
4. Restore the registry backup. Refer to “Restoring the Registry Backup” in Chapter 6 of this guide for more information.
5. Copy the system files that you have backed up from the backup area to the test environment.
6. Re-register the eWare.dll. Refer to “Re-registering a 5.7 or 5.8 eWare.dll” in Chapter 6 of this guide.
7. Restart IIS.

Performing a Test Upgrade

The procedure for performing a test upgrade is the same as for performing a live upgrade. Refer to “Running the Upgrade Install Shield” in Chapter 5 of this guide for more details.

Reviewing Upgrade Logs

When the trial upgrade has finished, you can view the upgrade log files. The log files can provide important information on any errors that may have occurred during the upgrade. Refer to the “Troubleshooting” chapter in this guide for more information on reviewing upgrade logs.

Testing a Test Upgrade

When you have finished a trial upgrade, it should be tested to ensure that any bugs or errors are identified and corrected. When testing the test upgrade, you should focus on testing frequently used functionality and components. Refer to “Testing an Upgrade” in Chapter 5 of this guide for more information on testing an upgrade.

You should perform the live upgrade only when you are completely satisfied that the test upgrade has been successful.

Now you can...

- § Identify why you should set up a test environment.
- § Identify test upgrade prerequisites.
- § Install backups to the test environment.
- § Perform a test upgrade.
- § Review upgrade logs.
- § Test a test upgrade.

Chapter 5

The Upgrade Install Shield

In this chapter you will learn about:

- § Items to note before beginning a live upgrade.
- § Scripts that run during an upgrade.
- § Running the upgrade Install Shield.
- § What does not get upgraded.
- § Testing an upgrade.

Before Beginning a Live Upgrade

Before beginning a live upgrade, you should take note of the following:

- § If you intend to perform the upgrade after office hours, it is recommended that you retrieve the license key and test it during office hours so that any problems can be addressed while assistance is available. To test the key, start the upgrade. If the key is not accepted, select the Cancel option and contact your license key provider. If the key is accepted, you should also select the Cancel option at this point as the purpose of this test is merely to ensure that the key is functional.
- § Note that IIS is stopped for the duration of an upgrade. This will affect customer sites if there are other Web applications running on the same server as CRM. It is generally recommended that, where possible, CRM be installed on a dedicated server.
- § You should give CRM end users advance notice that they will be unable to use CRM for the duration of the upgrade.
- § You should do a manual backup of the database, registry, and program files. Please refer to the “Manual Backup” chapter for more information on performing manual backups.
- § Ensure that you upgrade to the very latest CRM release, up to and including the latest patch service pack for that release.
- § If you are upgrading Solo Clients, all 5.7 or 5.8 users should synchronize their data. Please refer to the *Sage CRM 6.0 Solo Guide* for more information on upgrading Solo Clients.

What Scripts Run During the Upgrade?

The following scripts run when the upgrade Install Shield is activated:

- § The following scripts run during a standard upgrade from 5.8 to 6.0:
 - update_metadata58.es – Migrates all hosting metadata.
 - CoachingCaptions.esChange.html – Adds new metadata for the new coaching functionality in 6.0.
 - CustomPages.esChange.html – Adds new tabs and updated tabs to the system.
 - Custom_Captions.esChange.html – Adds new captions and translations to the system.
 - Docpath.esChange.html – Provides custom metadata for the DocStore, DocTemplates, and ReportsRootDirectory.
 - Update_helplink.esChange.html – Inserts all new help file content.
 - update_metadata.esChange.html – Updates all metadata.
 - views.esChange.html – Runs and upgrades system views.
 - user_views.esChange.html – Runs and upgrades customizable CRM user views.
 - Tables.esChange, tables.es – Updates the schema, adding new tables, columns, and adjusted columns.
- § The following extra scripts run when upgrading from 5.7 to 6.0:
 - update_metadata57.es – Migrates all hosting metadata.

Running the Upgrade Install Shield

To run the upgrade Install Shield:

1. Place the Sage CRM 6.0 setup CD in the CD drive.

The Sage CRM Installation screen is displayed. You can install Sage CRM Standard or Sage CRM Advanced.

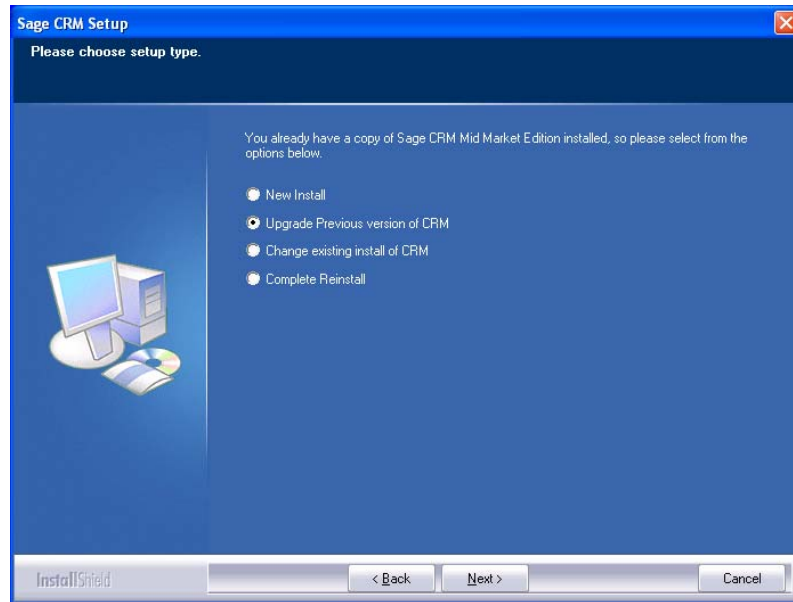
2. Select Install Sage CRM Advanced.

The Install Shield Wizard is displayed.

3. Click on the Next button to continue.

4. Review the Software License Agreement. If you accept all of its terms, select the I accept the terms of the license agreement option and click Next; otherwise select the I do not accept ... option and Cancel to end the installation.

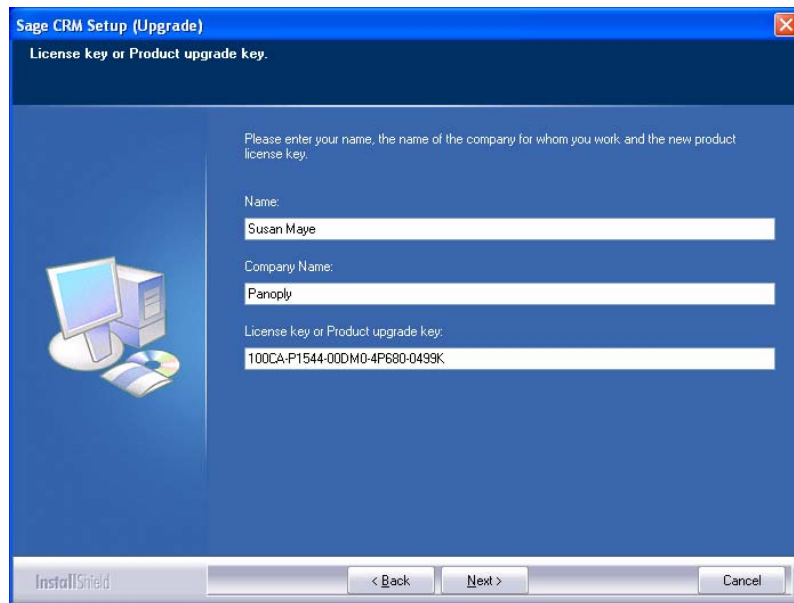
If you accept the terms of the license agreement, the setup type dialog box is displayed.



Setup Type dialog box

5. Select the Upgrade Previous Version Of CRM option.
6. Click on Next to continue.

The License Key Or Product Upgrade dialog box is displayed.



License Key Or Product Upgrade Key dialog box

7. Type your name in the Name field, your company name in the Company Name field, and your license key in the License Key Or Product Upgrade Key field.
8. Select Next.

The Select Install dialog box is displayed.

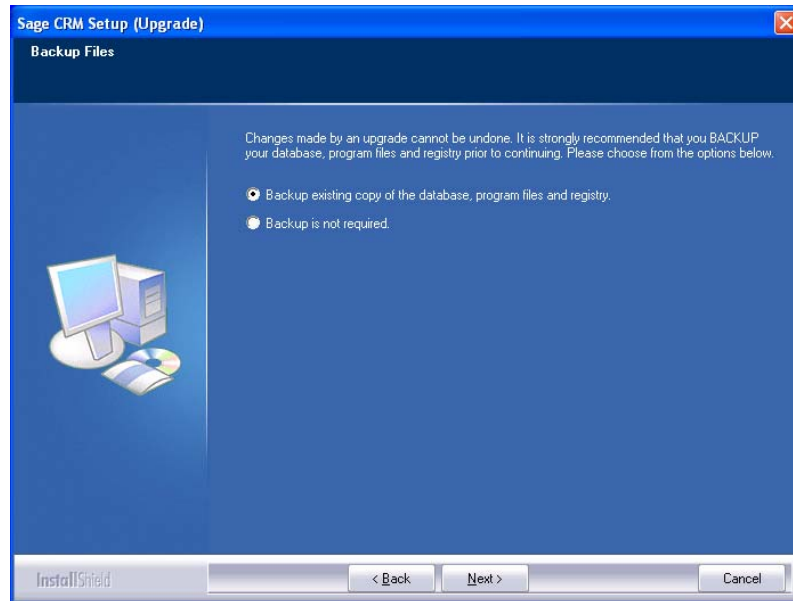
9. Choose the install you wish to upgrade.

Note: It is recommended that you use the default installation name, CRM, when installing and upgrading Sage CRM.

10. Click on the Next button.

If you are upgrading from version 5.7, the Choose Destination Location dialog box is displayed. Click on the Browse button if you wish to change the location of the program files. To accept the default program files location, select Next.

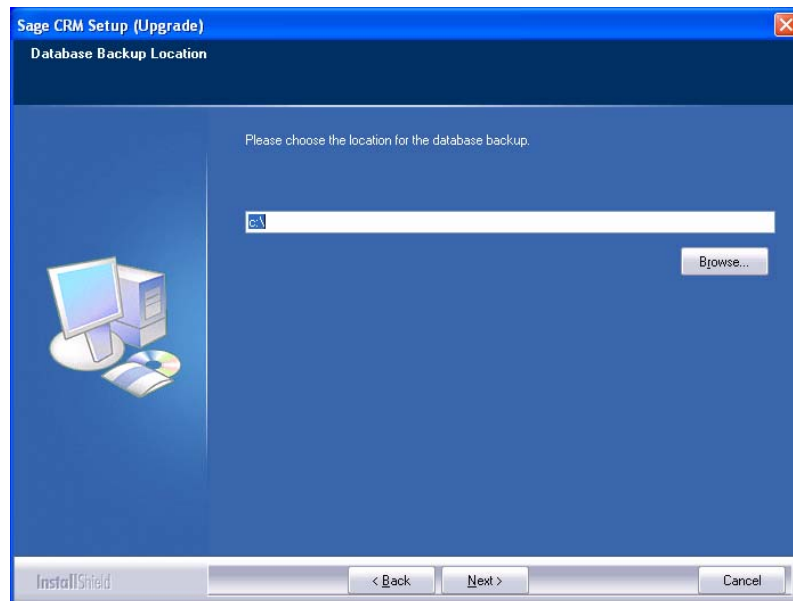
If you are upgrading from version 5.8, the install program does not include the Choose Destination Location dialog box. Instead, it goes directly to the Backup Files dialog box.



Backup Files dialog box

11. Select the Backup Existing Copy Of The Database, Program Files And Registry option. This option will not include program files for upgrades from version 5.7 to 5.8.
12. Select Next.

The Database Backup Location dialog box is displayed.



Database Backup Location dialog box

13. Browse to the backup location for the database.

14. Click on the Next button.

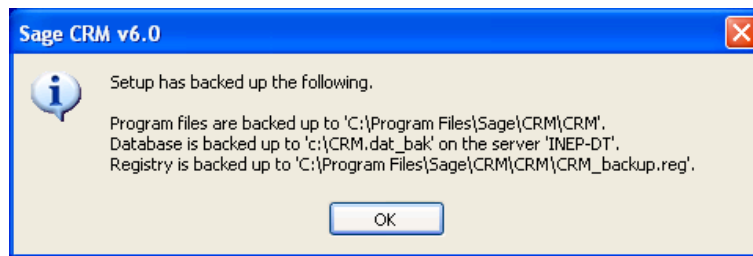
The Start Copying Files page is displayed.

15. Click on the Next button.

A dialog box is displayed informing you that you need to stop IIS to continue.

16. Click on Yes.

IIS is stopped and the backups are created. When this process has finished a dialog box is displayed to tell you where the program files, database, and registry are backed up.

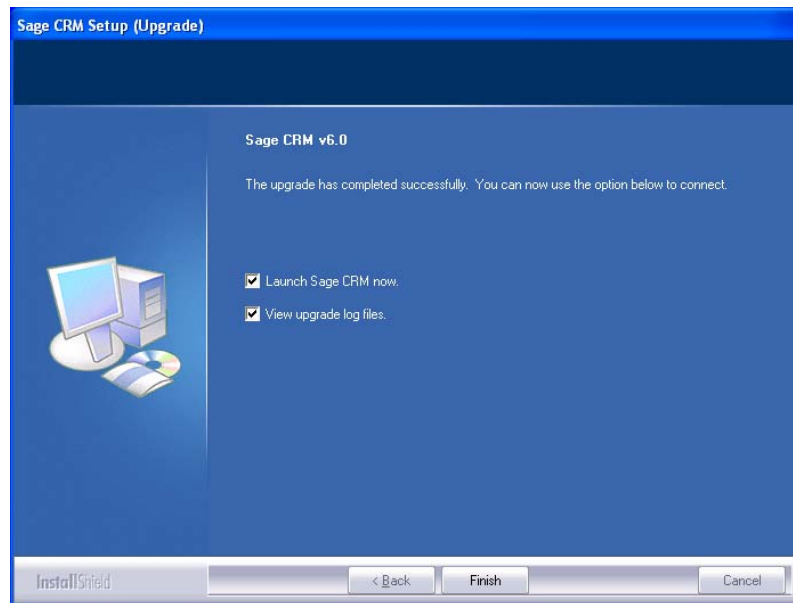


Program Files, Database, and Registry backup locations

Note: If you are upgrading from 5.7 to 6.0, only the database and the registry are backed up at this point. The program files are retained as a backup in the old install location.

17. Click on OK to continue.

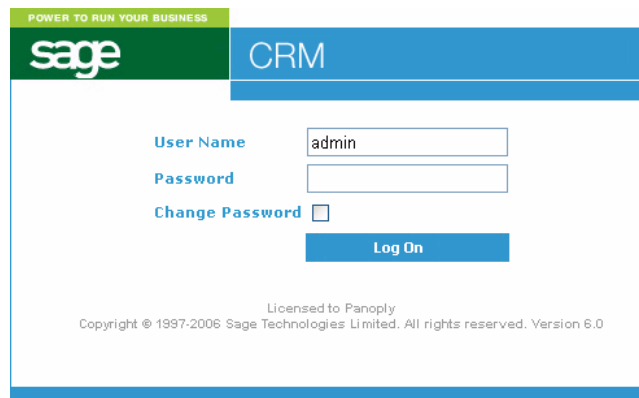
18. The Setup Complete Dialog box is displayed when the upgrade has completed.



Setup Complete dialog box

19. Select the Launch Sage CRM Now and View Upgrade Log Files checkboxes.
20. Select Finish.

The CRM Logon page is displayed in a new browser window.



CRM Logon page

If any of the colors or images from the original install are displayed on the logon page:

- a) Open Tools | Internet Options and ensure that the General tab is selected.
- b) From the Temporary Internet Files panel, select the Delete Files button.

