



Sage CRM

7.0 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, regional products may use different brand names.

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 version 6.1 SP1 or version 6.2 SP1 to 7.0.

Before beginning an upgrade, you should note the following:

- When upgrading to version 7.0, users require a 7.0 license key for the new version.
- This guide can be used with all types of upgrades, including Sage CRM with non-standard functionality, such as the Extensibility Module. When performing a Solo upgrade, you should also consult the *Sage CRM 7.0 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.
- Depending on factors such as the size of an existing installation, the number of existing customizations, and the number of users, 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 6.2 SP1 to version 7.0:

- 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
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.

Chapter	Summary
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

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 Administration tool, for example, SQL 2005 Management Studio, and back up the database from there.
3. Save the restored database files to the backup folder.
4. Zip up the database backup files to save space.
5. 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.

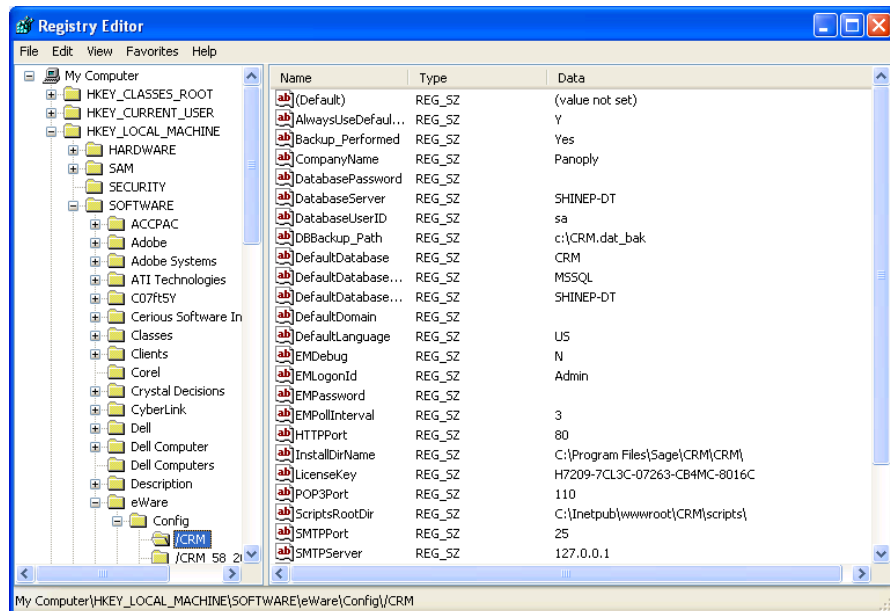
Backing up the Registry

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>



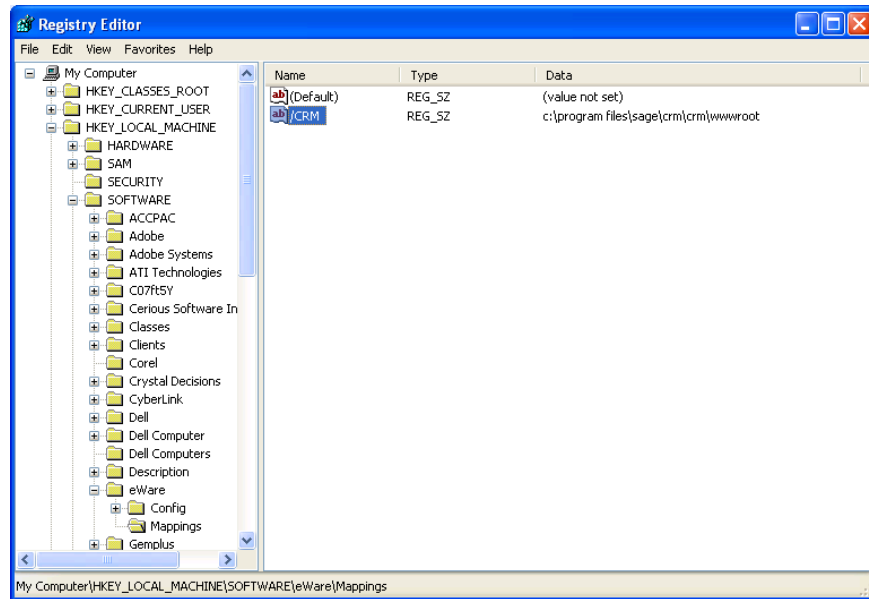
Registry Editor

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 6.2 SP1 install files. By default, the files are installed to ..\Program Files\Sage\CRM\- 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.
- Back up the database.
- Back up the registry.
- Back up program files

Chapter 3

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 the Extensibility Module. It will expire three months after installation.

Software Installation

To mirror the live environment successfully, Microsoft IIS, database management software (for example, SQL Server 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 E-mail 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 7.0 Solo Guide* for additional information on performing a Solo upgrade.

Script Customizations

If the client's license includes the Extensibility Module, 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 the Extensibility Module.

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 6.2 SP1, install version 6.2 SP1 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 6.2 EWARE.DLL" in Chapter 7 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 6 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 6 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 4

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.
- 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 have a backup of any system views you have customized as these may be overwritten on upgrade.
- 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 6.2 SP1 users should synchronize their data. Please refer to the *Sage CRM 7.0 Solo Guide* for more information on upgrading Solo Clients.

- If you are upgrading from a pre-7.0 version of Sage CRM, it is recommended that you review field level scripts which have been used to control access to fields in the user interface - for example, hiding a field for a certain user type. These fields may be exposed in the SData feed on the Interactive Dashboard. The SData schema supports CRM's standard security features (field security, security profiles, and territories).

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 6.2 SP1 to 7.0:
 - CustomPages.es – updates the CRM internal custom pages.
 - Custom_Captions.es – Adds new captions and translations to the system.
 - updatehelplink.es – Inserts all new help file content.
 - update_metadata.es – Updates and cleans all metadata.
 - addConstraints.es – Applies database integrity constraints.
 - views.es – Runs and upgrades system views.
 - user_views.es – Runs and upgrades customizable CRM user views.
 - Tables.es – Updates the schema, adding new tables, columns, and adjusted columns.
 - Update_indexes_mssql.sql
- The following additional scripts are run during a standard upgrade from 6.2 SP1 to 7.0:
 - Docpath.es – Provides custom metadata for the DocStore, DocTemplates, and ReportsRootDirectory.

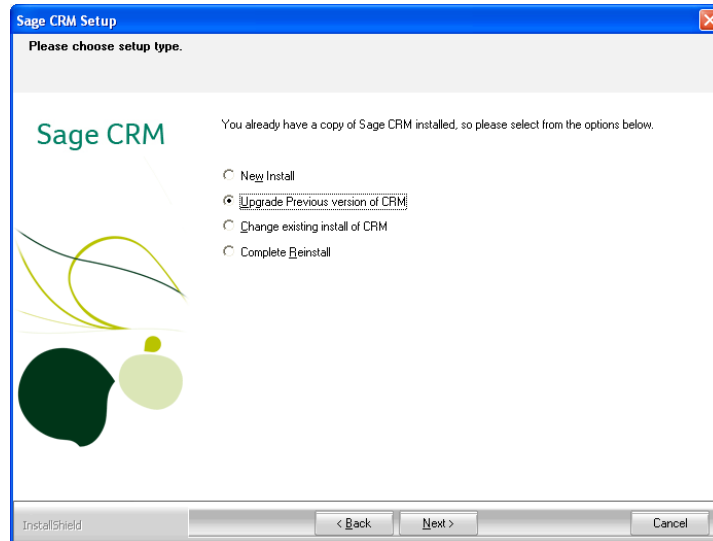
Running the Upgrade Install Shield

To run the upgrade Install Shield:

1. Place the Sage CRM 7.0 setup CD in the CD drive.
The Sage CRM Installation screen is displayed.
2. Select Install Sage CRM.
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 Select Install dialog box is displayed.

7. Choose the install you wish to upgrade.

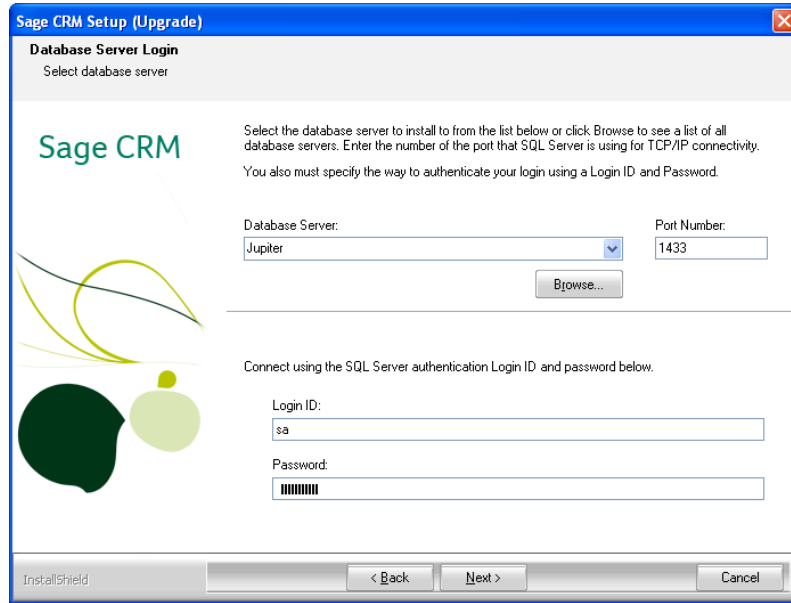
Note: It is recommended that you use the default installation name, CRM, when installing and upgrading Sage CRM.

8. Click on the Next button.

The Customer Information dialog box is displayed.

9. Make sure your name is in the Name field, and your company name is in the Company Name field.
10. Enter the license key in the License Key field.
11. Enter the details of the database server you want to install to.

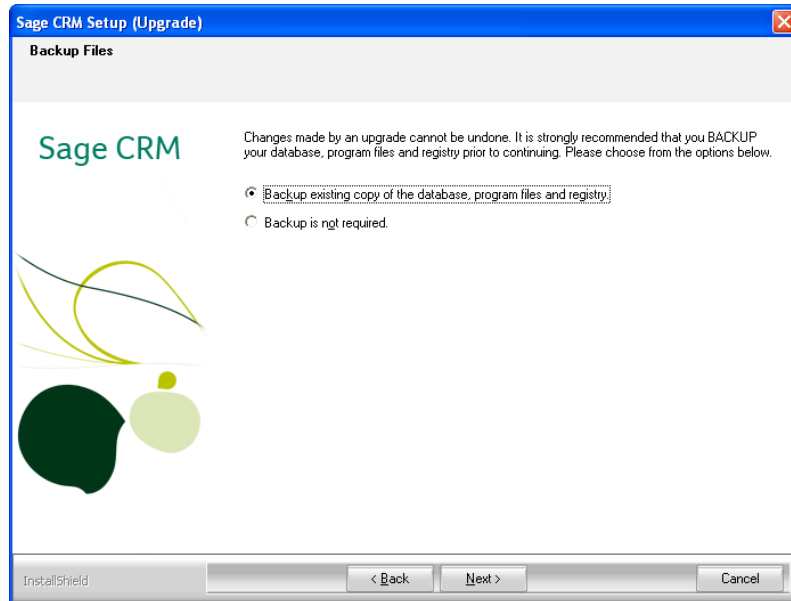
Note: The Window Authentication option is not available during an install or upgrade. If you are upgrading from 6.2 SP1, you need to set up an SQL Server User ID.



Database Server Login dialog box

12. Select Next.

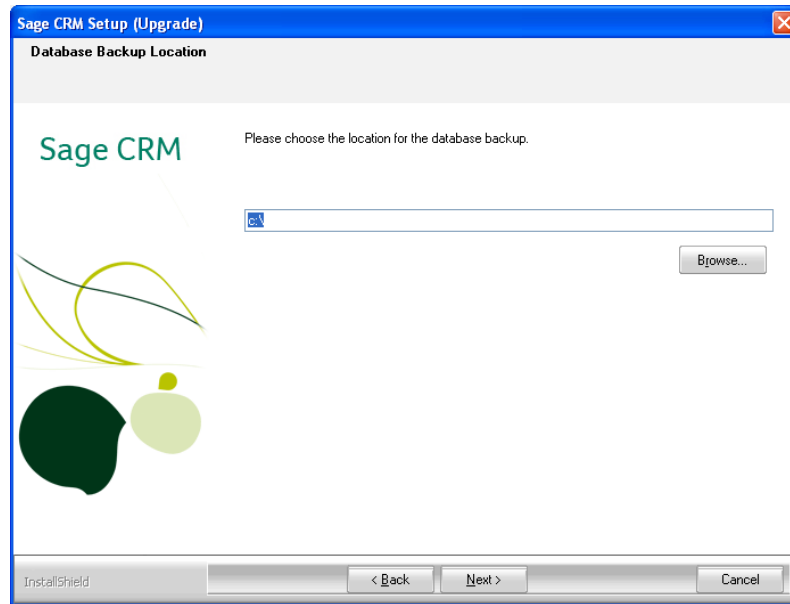
The Backup Files dialog box is displayed.



Backup Files dialog box

13. Select the Backup Existing Copy Of The Database, Program Files And Registry option.
14. Select Next.

The Database Backup Location dialog box is displayed.



Database Backup Location dialog box

15. Browse to the backup location for the database.
16. Click on the Next button.

The Start Copying Files page is displayed.

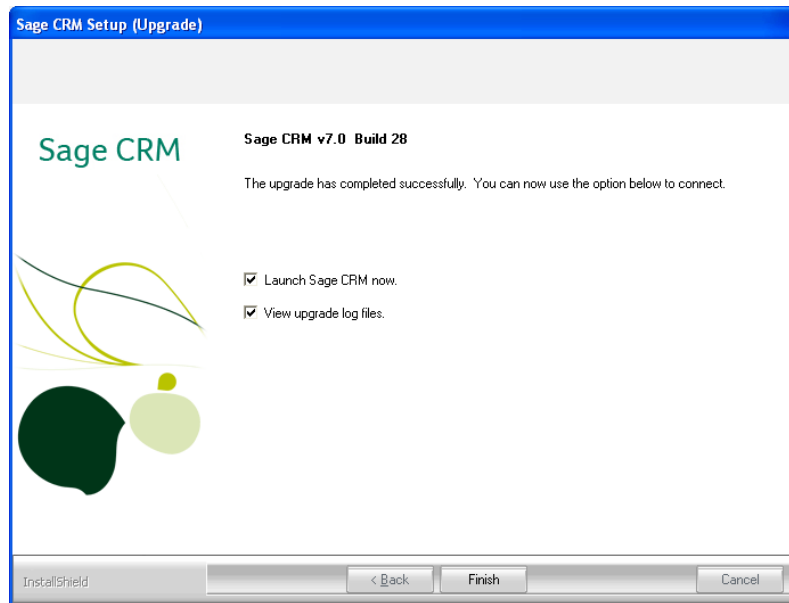
17. Click on the Next button.

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

18. 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.

19. Click on OK to continue.
20. The Setup Complete Dialog box is displayed when the upgrade has completed.



Setup Complete dialog box

21. Select the Launch Sage CRM Now and View Upgrade Log Files checkboxes.
22. Select Finish.

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

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.
- c) When the Delete Files dialog box is displayed, select the Delete All Offline Content checkbox and click OK.
- d) Refresh the CRM logon page.

The CRM logon page is displayed with the latest colors and images.

The Upgrade Log is displayed in a separate browser window.

Refer to the "Troubleshooting" chapter for more information on the upgrade log.

Starting the CRM Indexer Service

The CRM Indexer Service is required to feed data to the CRM Keyword Search function. The service no longer needs to be started manually. However, if it has been stopped and you want to start it again, you can do so manually.

To start the CRM Indexer Service:

1. Select Control Panel | Administrative Tools | Services.
2. Right-click on CRM Indexer Service and select Start.

Testing an Upgrade

You should discuss testing requirements with the customer in advance. Post-upgrade testing should not involve a comprehensive test of all CRM functionality. It is recommended that test time be focused on testing

- Functionality that is used frequently by the particular customer.
- Advanced customizations. In general, testing customer customizations should take a large amount of the allotted test time.
- Data integrity. Data checks should be carried out to ensure that upgraded data appears as expected.

Note: If the test environment is at the customer site, it can be beneficial to have some of the end users at the customer site carry out checks on frequently used functionality.

The following is a guide to functionality that should be tested post-upgrade:

Test Action

Logon is successful

Mail merge / document drop functionality working well, and with the correct plugin

Report writer presenting in all formats (HTML, PDF, CSV, XLS)

E-mail management functioning as expected, including customizations

Functionality regularly used by the customer working as expected

Previous functional integration with third party database functioning

Advanced customizations (.ASP pages) functioning as expected

Test Action

Custom icons copied to new install location

Upgraded Solo client functioning

Outlook and Exchange integration functioning as expected

All plugins (Outlook, xEawareControl Version, OfflineInstall, and CTI) updated and working as expected

All plugins compatible with and match the upgraded CRM version

Library location checked

Add/Find/Edit/Delete records for each of entities

System help functioning

Data upload functioning as expected

Now you can...

- Identify items to note before beginning an upgrade.
- Identify the scripts that run during an upgrade.
- Run the upgrade Install Shield.
- Test an upgrade.

Chapter 5

Restoring a Live Environment

In this chapter you will learn about:

- Why you would restore a live environment.
- Restoring a 6.2 SP1 live environment.

Why Restore a Live Environment?

If a live upgrade fails, or if there are problems with functionality in a new upgrade, it is recommended that the customer site be returned to the pre-upgrade live environment while any problems are being addressed. This will minimize downtime at the customer site.

Restoring a 6.2 SP1 Live Environment

To restore a 6.2 SP1 live environment, you must complete the following steps:

- Re-register the 6.2 EWARE.DLL. Refer to "Re-registering a 6.2 EWARE.DLL" in this chapter.
- Restore the database backup. Refer to "Restoring the Database Backup" in this chapter.
- Restore the registry backup. Refer to "Restoring the Registry Backup" in this chapter.
- Uninstall the 6.2 e-mail management and escalation services. Refer to "Uninstalling 6.2 Services" in this chapter.
- Restore the 6.2 e-mail management and escalation services. Refer to "Re-Installing 6.2 Services" in this chapter.
- In IIS Administration, redirect the web site from the new 7.0 site to the old 6.2 site. Refer to "Redirecting the Web Site" in this chapter.
- Stop and restart IIS.

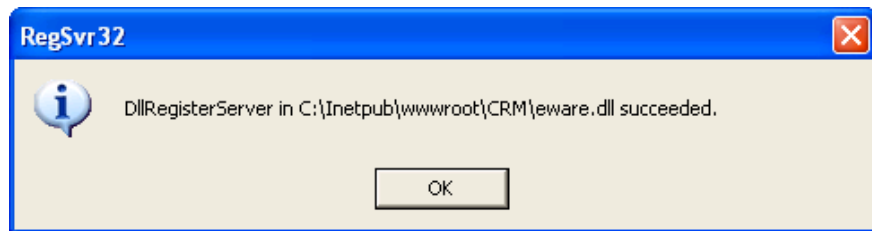
Re-registering a 6.2 EWARE.DLL

To re-register a 6.2 EWARE.DLL:

1. Select Start | Run.

2. Type `regsvr32 C:\Program Files\Sage\CRM\ and click OK.`

The RegSvr32 dialog box is displayed.



RegSvr32 dialog box

3. Click Ok to complete the DLL registration.

Restoring the Database Backup

To restore the database backup:

1. Open the Database Administration tool, for example, SQL 2005 Management Studio.
2. Save the restored database files to the backup folder.
3. Restore the backed up database to the old 6.2 SP1 install.

Note: Please refer to your database administration documentation for information on restoring backed up databases. If you experience any difficulties when restoring the database, you should contact the IT Administrator at the customer site.

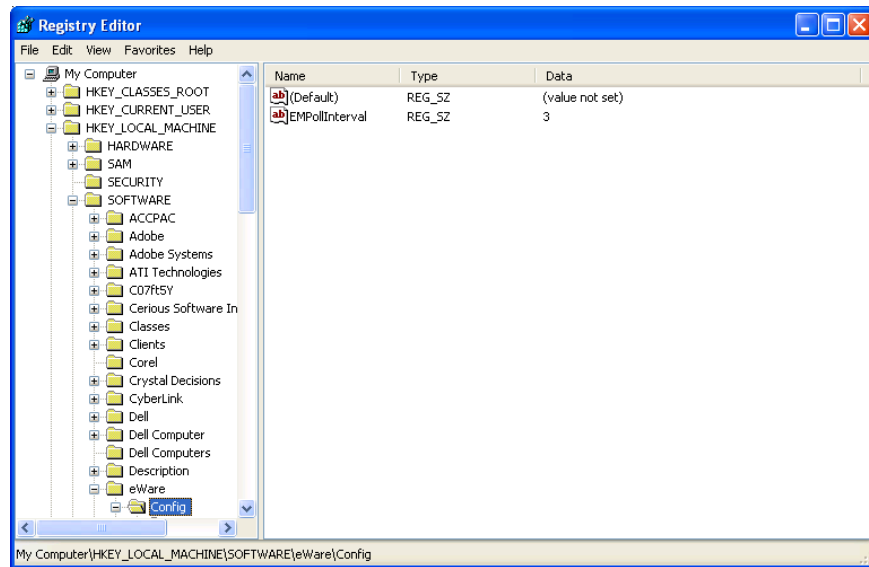
Restoring the Registry Backup

To restore the backed up registry:

1. From the desktop on the Web Server, open Start | Run, and type **Regedit** in the Run dialog box.
2. Click OK.

The Registry Editor is opened.

3. Browse to `HKEY_LOCAL_MACHINE\SOFTWARE\eWare\Config`



Registry Editor

4. Select File | Import.

The Import Registry File dialog box is displayed.

5. Browse to the location where you have backed up the registry and select the registry file.

6. Select the Open button.

The Registry Editor dialog box is displayed.

7. Click OK to complete the registry import.

8. In the Registry Editor, browse to `HKEY_LOCAL_MACHINE\SOFTWARE\eWare\Mappings`.

9. Select File | Import.

The Import Registry File dialog box is displayed.

10. Browse to the location where you have backed up the registry and select the mappings file.

11. Select the Open button.

The Registry Editor dialog box is displayed.

12. Click OK to complete the mappings import.

Uninstalling 6.2 Services

To uninstall the 6.2 e-mail management service application:

1. Select Start | Run and type **cmd**.

The DOS prompt window is displayed.

2. Browse to the folder where the EWAREEMAILMANAGER.EXE file is saved. By default, this is located in `..\Program Files\Sage\CRM\Services`.
3. Type **eWareEmailManager /u**.
4. Press the Enter key.

A pop-up box is displayed to inform you that the service has been successfully uninstalled.

To uninstall the 6.2 escalation service application:

1. Select Start | Run and type **cmd**.

The DOS prompt window is displayed.

2. Browse to the folder where the CRMESCALATIONSERVICE.EXE file is saved. By default, this is located in `..\Program Files\Sage\CRM\Services`.
3. Type **CRMEscalationService /u**.
4. Press the Enter key.

A pop-up box is displayed to inform you that the service has been successfully uninstalled.

Re-installing 6.2 Services

You do not need to re-install the 6.2 e-mail management service application but if you want to, you can:

1. Select Start | Run and type **cmd**.

The DOS prompt window is displayed.

2. Browse to the folder where the EWAREEMAILMANAGER.EXE file is saved. By default, this is located in `..\Program Files\Sage\CRM\Services`.
3. Type **eWareEmailManager /i**.
4. Press the Enter key.

A pop-up box is displayed to inform you that the service has been successfully installed.

You do not need to re-install the 6.2 escalation service application but if you want to, you can:

1. Select Start | Run and type **cmd**.

The DOS prompt window is displayed.

2. Browse to the folder where the CRMESCALATIONSERVICE.EXE file is saved. By default, this is located in `..\Program Files\Sage\CRM\Services`.
3. Type **CRMEscalationService /i**.
4. Press the Enter key.

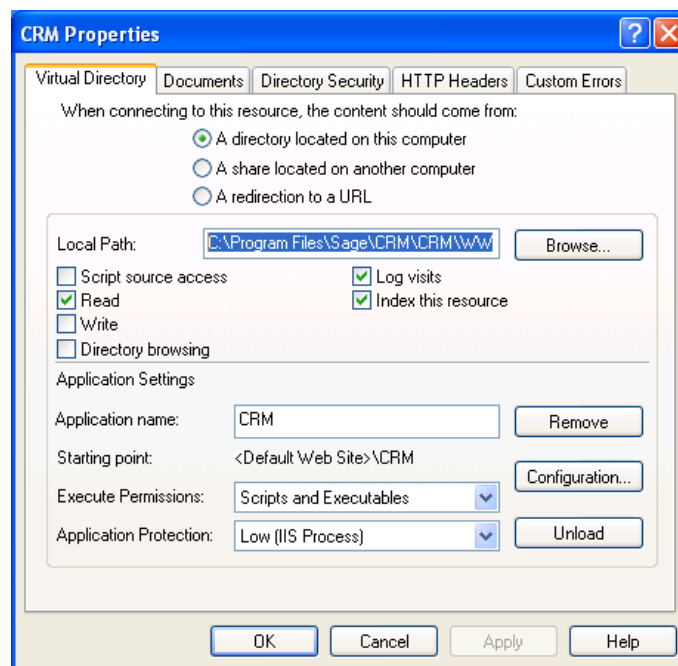
A pop-up box is displayed to inform you that the service has been successfully installed.

Redirecting the Web Site

To redirect the Web Site:

1. Open IIS.
2. Browse to <Local Computer> | Web Sites | Default Web Site.
3. Right-click on the install name and select Properties.

The CRM Properties dialog box is displayed.



CRM Properties

4. The new upgraded site location is displayed in the Local Path field. You must replace this path with the path for the backed up 6.2 site that you are restoring. For example, type C:\Program Files\Sage\CRM\<install name>_backup in the Local Path field.
5. Click on OK.

Now you can...

- Describe why you would restore a live environment.
- Restore a live 6.2 environment.

Chapter 6

Troubleshooting

In this chapter you will learn about:

- Reviewing the Upgrade Log.
- Troubleshooting tips.

Reviewing the Upgrade Log

The Upgrade Log should be reviewed to ensure that all elements, such as views, tables, indexes, index constraints, and registry keys, have been fully upgraded.

To review the upgrade log:

1. To view the upgrade log, browse to `..\Program Files\Sage\CRM\<install name>\Setup`, and open `UPGRADELOG.HTML`.

The Upgrade Summary panel is displayed.

2. The Upgrade Summary panel lists all the scripts that were run during the upgrade and indicates whether they were successful. Refer to Chapter 5 of this guide for more information on the scripts that are run during the upgrade.
3. If you want to return to the Upgrade Summary panel at any point, select the Upgrade Summary hypertext link at the top of the screen.
4. Check the CRM Script Logs on the top part of the left-hand panel. All CRM script files (ES files) that were run are listed here. Each item on the list is a hypertext link.
5. Click on a link to view a report of any of the ES scripts that ran. When you do this, a summary report is displayed in the right-hand panel.
6. Click on the Expand All button to view the full report.

You can click on any of the view names or bolded items to collapse the list. You can then click on the item again to expand it.

7. Scroll down the report and review each section. The message "NB must be fixed" is displayed to indicate a problem that needs to be resolved. You need to correct the problems manually if they are indicated in this way.
8. Next check the SQL Scripts Logs at the bottom part of the left-hand panel. All SQL scripts that were run during the upgrade are listed as LOG files here.

9. Click on a log hypertext link to review the log file for any of the SQL scripts that ran during the upgrade.
10. If errors occur while an SQL script is running, an additional HTML file is displayed that corresponds to the LOG file. An asterisk symbol (*) is included at the end of the HTML file name to highlight the fact that this HTML file has been generated.

When you click on the hypertext link of the HTML file, a summary of the error is displayed in the right-hand panel. You can click on the LOG file to view the SQL script log.

After you have reviewed both files, you need to resolve any problems manually.

Troubleshooting Tips

View Error

A common error can occur when a standard Sage CRM view has been modified in the implementation to include specific fields. During the upgrade process, CRM checks all of the standard views against the expected view. If it finds a standard view is in any way different from what was expected, it will log an error, retain the current view syntax, and add the upgraded view with the view name appended with `_New`. For these cases, it is important to ensure that the only change to the affected view is the additional fields that had been added prior to the implementation.

Now you can ...

- Review the Upgrade Log.
- Describe troubleshooting tips.

Chapter 7

Upgrading Multi-Server CRM

In this chapter you will learn about:

- Prerequisites for upgrading multi-server CRM.
- The Multi-server CRM upgrade process.

Prerequisites for Upgrading Multi-Server CRM

When upgrading multi-server CRM you should note the following:

- When upgrading to version 7.0 from version 6.2 SP1, you will require only a 7.0 license key.
- Your license key can be used on all of the servers in the cluster you are about to set up.
- Before beginning an upgrade, ensure that all servers (with the exception of the Database Server) are disconnected from the database.
- You can have multiple Tomcat servers pointing at the one database provided the database is configured to provide enough connections to serve the multiple connection pools. Each Tomcat server opens a connection pool of 10 connections by default.

Multi-Server CRM Upgrade Process

When upgrading multi-server CRM from version 6.2 SP1 to version 7.0, you should perform the following steps:

- Create a manual backup of the database from the CRM Database Server. Please refer to the "Manual Backup" chapter in this guide for more details.
- For all CRM Servers in the cluster, including the Database Server, create manual backups of the program files and the registry. Please refer to the "Manual Backup" chapter in this guide for more details.
- Set up a test environment that mimics the live environment as closely as possible. For example, if there are four servers in your multi-CRM cluster, then you should set up four separate test servers, with each one being an exact (or close) copy of one of the live servers. Refer to the "Running a Test Upgrade" chapter in this guide for more information on setting up a test environment.

- Perform a test upgrade on the test environment. Refer to the "Running a Test Upgrade" chapter in this guide for more information on performing a test upgrade.
- Test the test upgrade. Refer to the "Running a Test Upgrade" chapter in this guide for more information on testing a test upgrade.
- When you are happy with the results of the test upgrade, perform the live upgrade on each of the CRM Servers, starting with the Database Server. Refer to "Running the Install Shield on the Database Server" and "Running the Install Shield on a non-Database Server" in this chapter for more details on upgrading each CRM server in the cluster.
- Test the live upgrade. Refer to "The Upgrade Install Shield" chapter in this guide for more information about testing a live upgrade.

Running the Install Shield on the Database Server

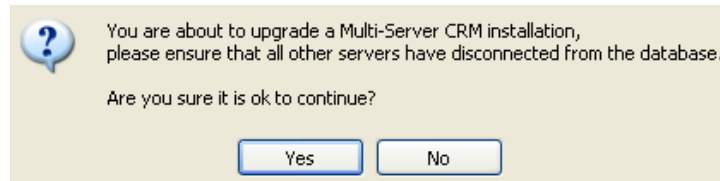
To run the upgrade Install Shield:

1. Place the Sage CRM 7.0 set up CD in the CD drive.
The Sage CRM Installation screen is displayed.
2. Select Install Sage CRM.
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 license agreement, the setup type dialog box is displayed.
5. Select the Upgrade Previous Version of CRM option.
6. Click Next to continue.
The Select Install dialog box is displayed.
7. Choose the install you wish to upgrade.
8. Click on the Next button.
The Customer Information dialog box is displayed.
9. Make sure your name is in the Name field, and your company name is in the Company Name field.
10. Enter the license key in the License Key field.

11. Select Next.

A dialog box is displayed to remind you that all servers must be disconnected from the database.



Dialogue box reminding you to disconnect all other servers from the database

12. If you are ready to continue, select Yes.

The Backup Files dialog box is displayed.

13. Select the Backup Existing Copy Of The Database, Program Files, And Registry option.

14. Select Next.

The Database Backup Location dialog box is displayed.

15. Browse to the backup location for the database.

16. Click on the Next button.

The Start Copying Files page is displayed.

17. Click on the Next button.

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

18. Click 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.

19. Click OK to continue.

20. The Setup Complete Dialog box is displayed when the upgrade has completed. Select the Launch Sage CRM Now and View Upgrade Log Files checkboxes.

21. Select Finish.

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

Running the Install Shield on a non-Database Server

To run the upgrade Install Shield:

1. Place the Sage CRM 7.0 set up CD in the CD drive.
The Sage CRM Installation screen is displayed.
2. Select Install Sage CRM.
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 license terms, the setup type dialog box is displayed.
5. Select the Upgrade Previous Version of CRM option.
6. Click Next to continue.
The Select Install dialog box is displayed.
7. Choose the install you wish to upgrade.
8. Click on the Next button.
The Customer Information dialog box is displayed.
9. Make sure your name is in the Name field, and your company name is in the Company Name field.
10. Enter the license key in the License Key field.
11. Click on the Next button.
A dialog box is displayed to remind you that all servers must be disconnected from the database.
12. If you are ready to continue, select Yes.
The Backup Files dialog box is displayed.
13. Select the Backup Is Not Required option.
14. Select Next.
A dialog box is displayed informing you that you need to stop IIS to continue.

15. Click Yes.
16. The Setup Complete Dialog box is displayed when the upgrade is complete. Select the Launch Sage CRM Now and View Upgrade Log Files checkboxes.
17. Select Finish.

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

Now you can ...

- Identify prerequisites for upgrading multi-server CRM.
- Identify the steps in the multi-server CRM upgrade process.

Chapter 8

Upgrade Checklist

In this chapter you will learn about:

- Items to include on an upgrade checklist.

Upgrade Checklist

The following is a list of items that might be included on an upgrade checklist:

Test Action

Manual Backup - Pre-Test Upgrade

Complete backup of Sage CRM database

Complete backup of Sage CRM program files

Complete backup of Sage CRM registry key

Generate Test Environment

Source trial license key for current version (with EM)

Source trial license key for upgrade version (with EM)

Install dependant third party software on test environment

Install current Sage CRM version using trial license key

Restore manual backup database to test environment

Delete vSentinal out of the views in the restored Sage CRM database

Restore Sage CRM program files to test environment

Confirm Windows NT security has been correctly set

Restart IIS

Complete base line testing (UAT test)

Script customizations using component manager and Zip

Test Upgrade

Test Action

Complete install shield upgrade to current version

Upgrade to latest service pack of Sage CRM

Upgrade Logs

Review upgrade logs for errors

Investigate each error and document resolution or outcome

Complete resolutions for each error

Function Testing

Complete generic functionality testing

Complete additional functionality testing

Document and resolve any functional irregularities

Client Customization Testing

Complete visual scan of screen customizations

Complete custom functionality testing

Document and resolve any custom irregularities

Data Integrity Testing

Complete random sampling of 20 company records

Client completes data integrity testing

Document and resolve any data irregularities

Freeze Live System

Estimate downtime for production system and document risks to client

Obtain client sign off to move forward with live upgrade

Lock users out of the Sage CRM system as server is taken offline

Live Manual Backup - Pre Live Upgrade

Complete backup of Sage CRM database

Complete backup of Sage CRM program files

Test Action

- Complete backup of Sage CRM registry key

Live Upgrade

- Complete install shield upgrade to current version
- Upgrade to latest service pack of Sage CRM

Upgrade Logs

- Review upgrade logs for errors
- Investigate each error and document resolution or outcome
- Complete resolutions for each error

Live Manual Backup - Post Live Upgrade

- Complete backup of Sage CRM database
- Complete backup of Sage CRM program files
- Complete backup of Sage CRM registry key

Function Testing

- Complete generic functionality testing
- Complete additional functionality testing
- Document and resolve any functional irregularities

Client Customization Testing

- Complete visual scan of screen customizations
- Complete Custom functionality testing
- Document and resolve any custom irregularities

Data Integrity Testing

- Complete random sampling of 20 company records
 - Client completes data integrity testing
 - Document and resolve any data irregularities
-

Now you can ...

- Identify items to include on an upgrade checklist.

