



SAVANCE EIOBOARD

EIOBoard v9 to v10 Upgrade with SQL

Upgrade Guide for Minimum Downtime

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Overview

EIOBoard v10 has had some major back-end server changes that require you to uninstall v9 before installing v10. These changes are related to the supported version of SQL server, the version of .NET used in IIS, and updates to many of the components used throughout the product. This document will help you properly prepare for the upgrade so it can go as smoothly as possible. Remember, we do offer a paid service to white-glove assist you through the entire process over a scheduled web conference if you prefer.

Uninstalling and reinstalling means there are some additional steps you'll want to take to make sure you preserve your settings exactly the way they are, make the transition as smooth as possible, and keep downtime to a minimum. **During the re-installation you will need your install key. Do not proceed without it.**

If you are currently running the EIOBoard database on a SQL version older than 2012, you will need to upgrade not only your EIOBoard but also your SQL instance. You may also want to upgrade to a later version of SQL even if EIOBoard v10 supports your current one. This guide is intended to help with either scenario.

Requirements

- Windows Server 2008 R2 or later
- SQL Express 2012 or later.

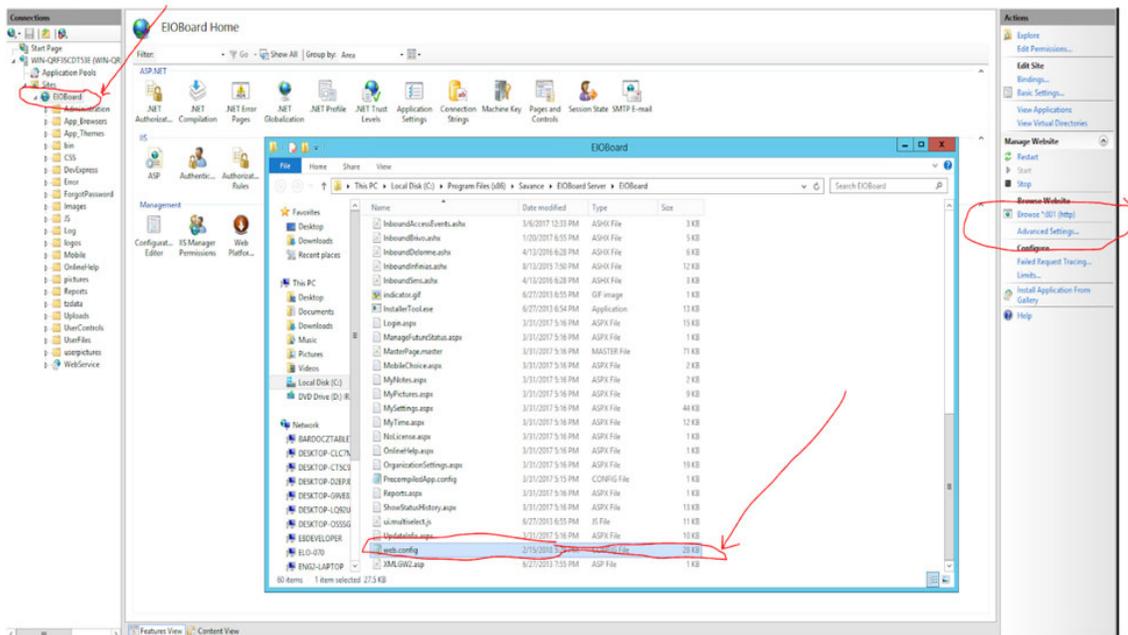
Process

1. Start by opening IIS (see image below). There are two pieces of information you want to have from here.

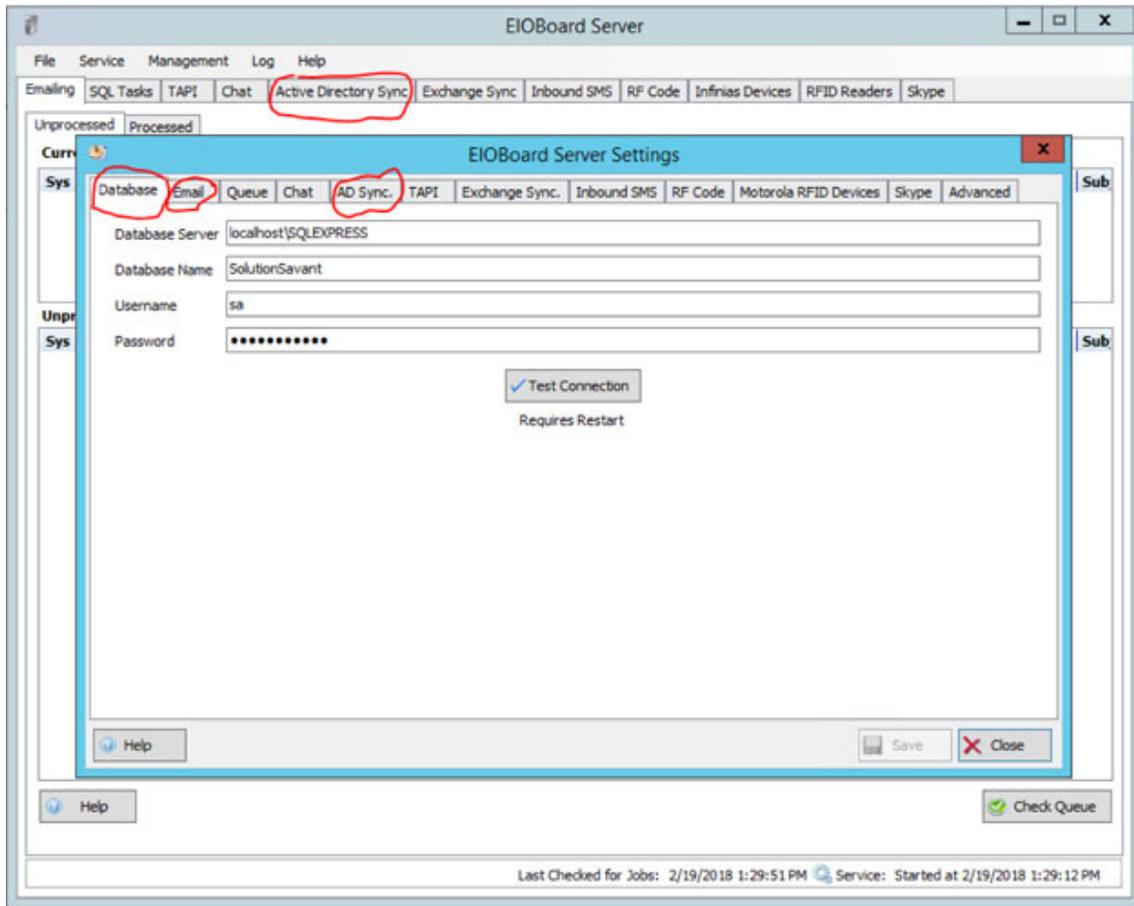
1. Note the EIOBoard website configuration. Is it a standalone site, and, if so, what port is it bound to? Or is it a virtual directory (is it under

another site and if so which one). To find out what port EIOBoard is on, single left click on the EIOBoard site and look on the right hand side under browse for the port (the example below shows port 801).

2. Backup the web.config file in case you need to refer to any info in it later. To do this, right click on the EIOBoard site and choose explore. Then find the web.config file in the directory that opens. The image below should help with both these steps.

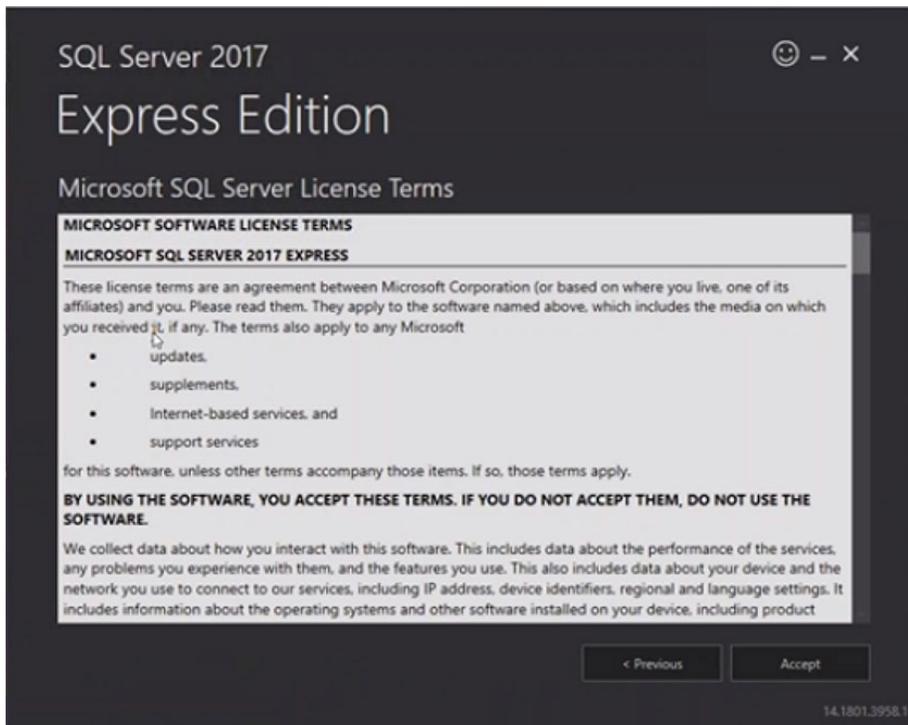
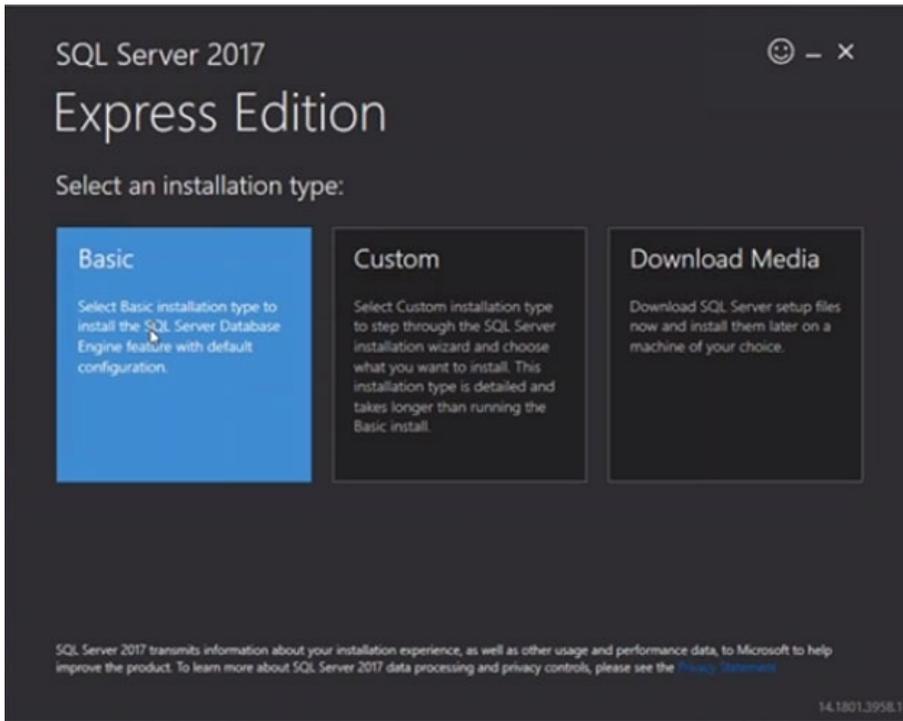


2. Go to the EIOBoard Server Admin Management => Settings and note down all the settings there. Make sure you have all the relevant passwords and credentials so you can re-enter them later. The most important settings here are on the Database, Email, and AD Sync tabs; however, depending on your installation other tabs may be important as well. Before proceeding, make sure you will be able to set things back exactly as they are. ***If you lack any of the passwords required, do not proceed until you know what they are.***

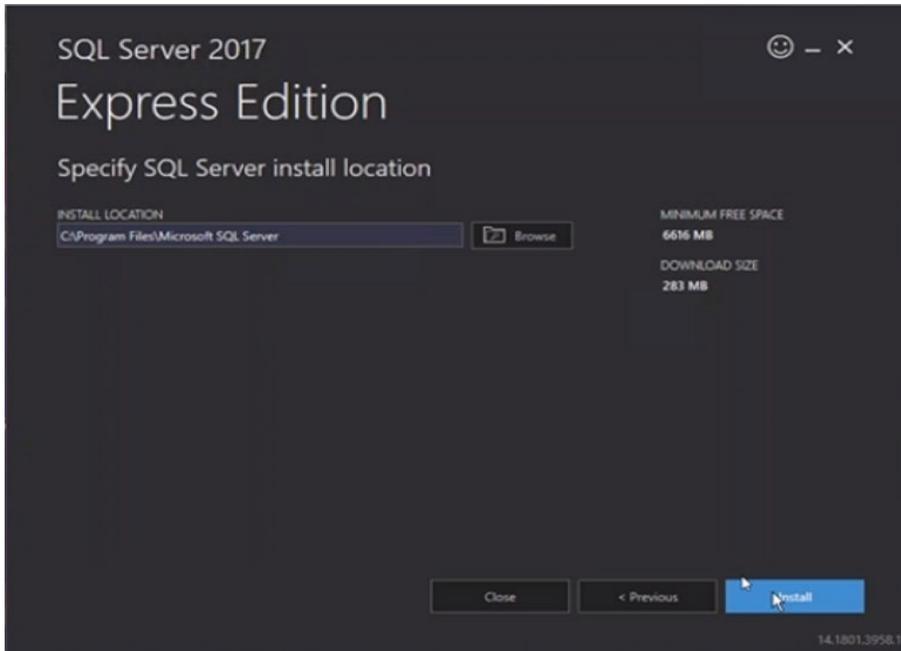


3. Install and configure SQL 2017.

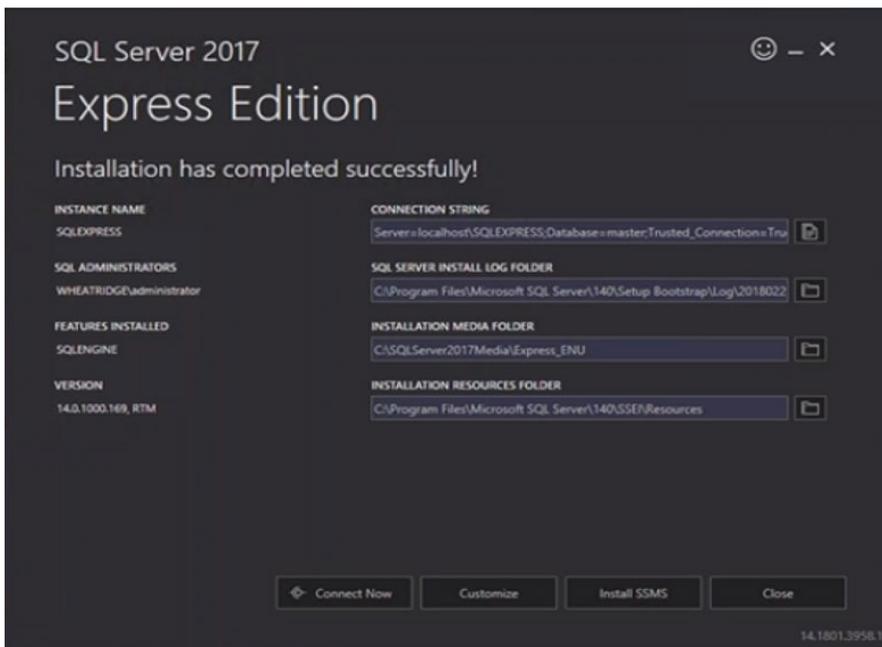
1. Download SQL Express 2017 from here:
<https://www.microsoft.com/en-us/download/details.aspx?id=55994;>
 then run it.
2. Choose Basic Installation and accept the license agreement.



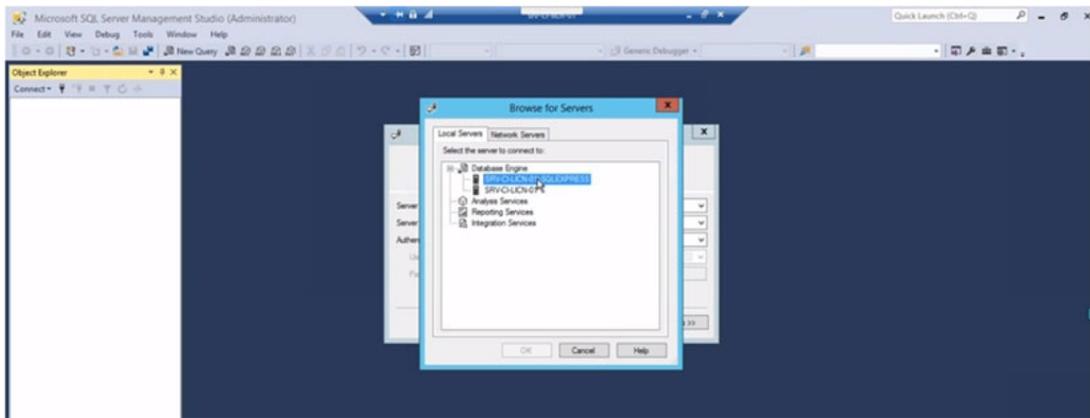
3. Hit Install:



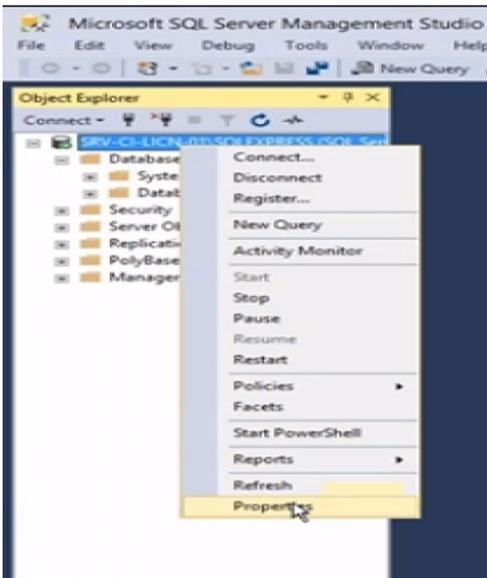
4. When notified the install is finished hit click the install SSMS button:



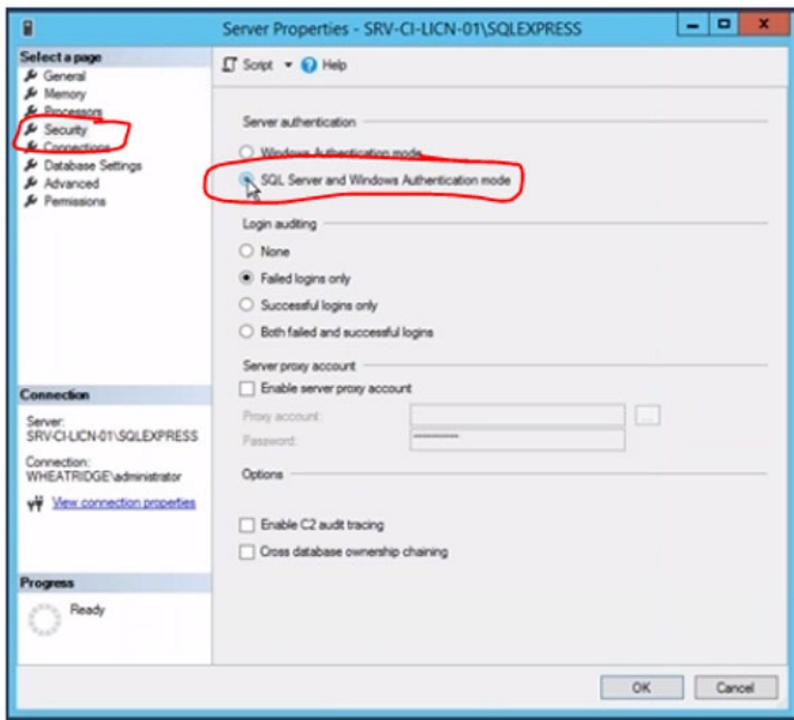
5. You will be taken to the download page for SQL Management Studio, at this link: <https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms>.
6. Download and run the SSMS installer. It is a large file, so it will take a while.
7. Open SSMS.
8. Browse for the correct SQL instance and connect to it using Windows Authentication. It will be called SQLEXPRESS by default, but if there is another instance already called SQLEXPRESS, it will be called SQLEXPRESS01 or if there is an 01 it will be 02, and so on.



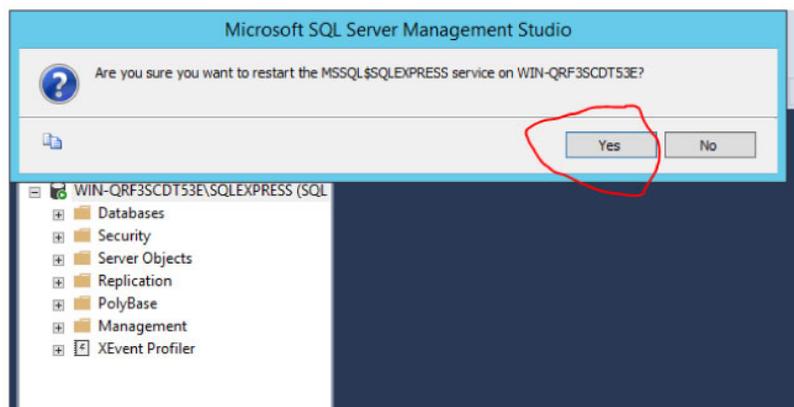
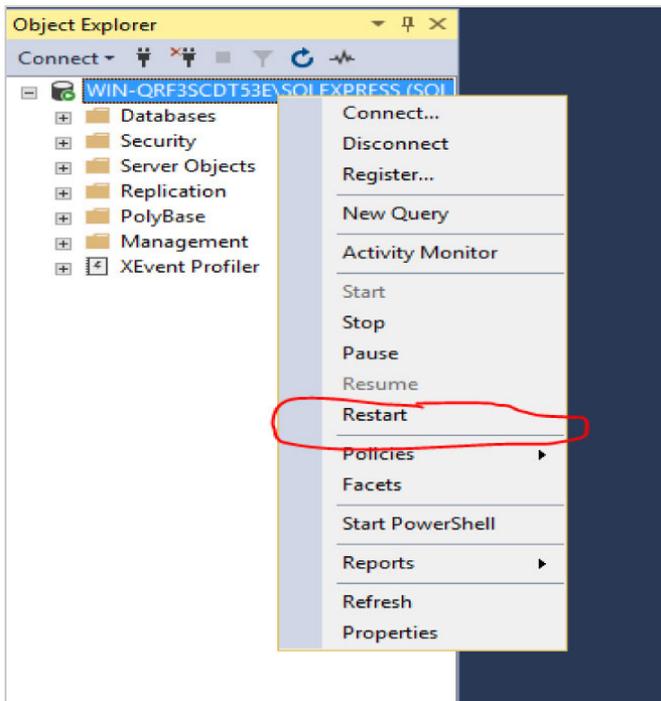
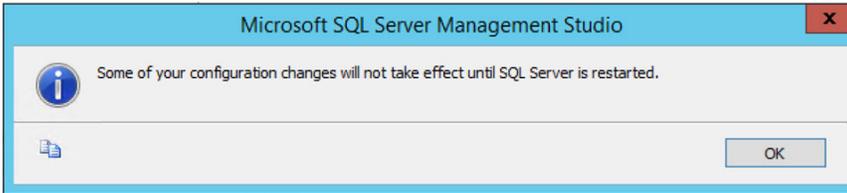
9. Right click on the instance and select Properties:



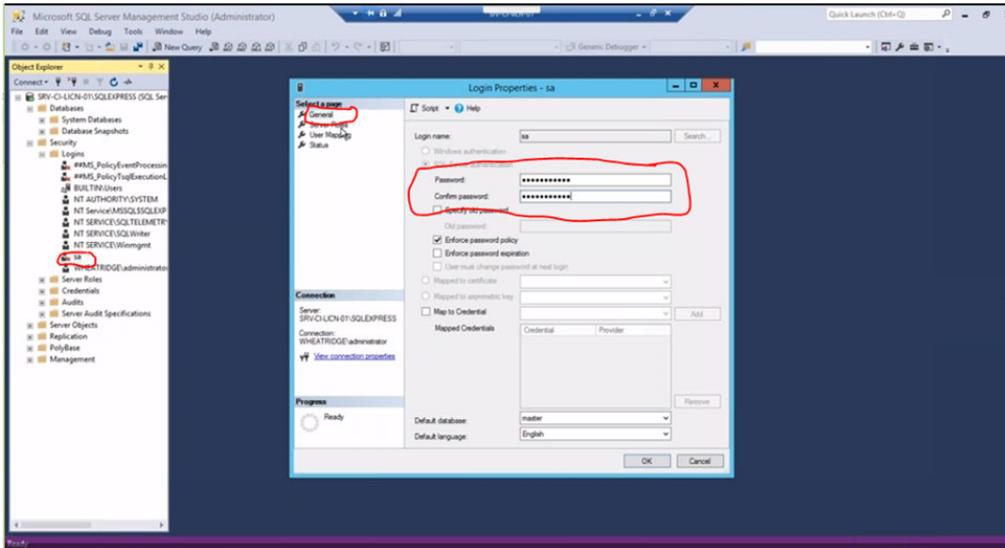
10. Go to the Security Properties and set the instance to Mixed Mode Authentication. Hit ok.



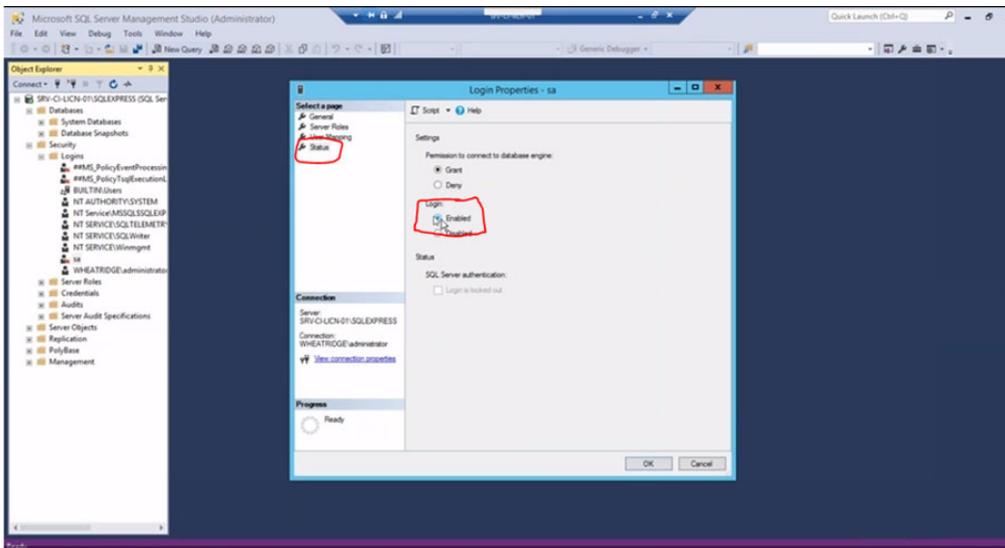
11. You will be told you need to restart SQL. Right click on the instance in Object Explorer, and choose Restart:



- On the left in the Object Explorer go to Security => Logins. Right click on 'sa' and choose Properties. Then set the sa password to whatever you want, but make sure to make a note of it. You will need it later.



- In the same Properties window, go to the Status section and set the sa account to Enabled. Hit ok. Right click on 'sa' in Object Explorer and choose refresh. The red x should disappear.



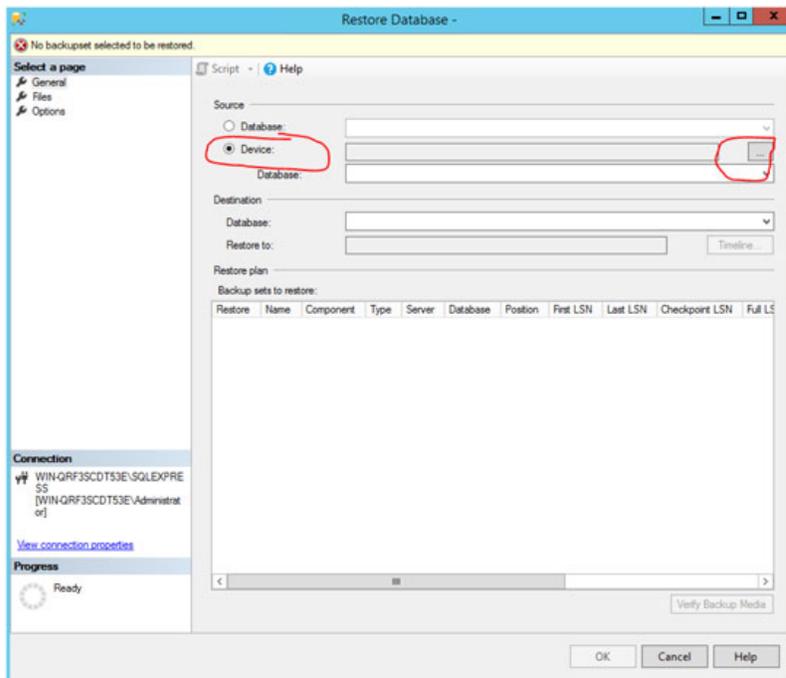
At this point, before you proceed, make sure you know all your current **EIOBoard server settings**, and have all necessary **credentials/passwords** for those settings. You are about to uninstall EIOBoard. You will need to reset those settings after installing v10. At this point, downtime is about to begin. All clients should now disconnect from EIOBoard.

4. To be sure you have all the data entered into EIOBoard since you started this process, back up the SQL database by going to EIOBoard Server Admin => SQL Tasks. Find the Backup Database Task. Click on it and click Process Now.

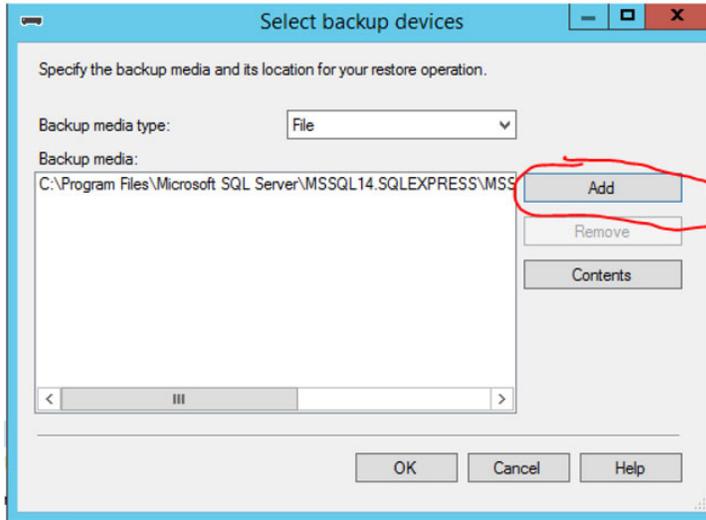
To find where the backup is located follow this article:

<http://support.savance.com/index.php?eioboard/Knowledgebase/Article/View/187/0/how-to-find-my-backup-location>

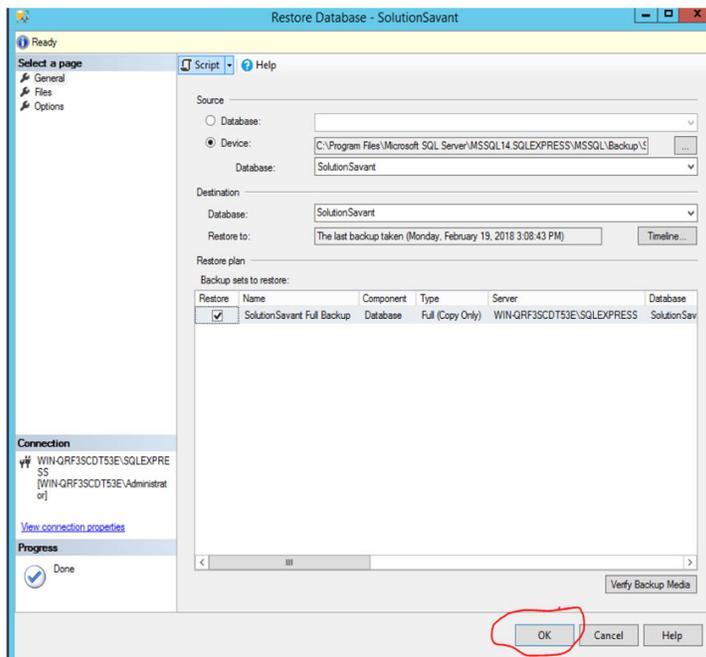
5. In the Object Explorer of SSMS, right click on Databases and choose Restore Database. The window shown below will open. Here, select Device and click the 3-dot browse button.



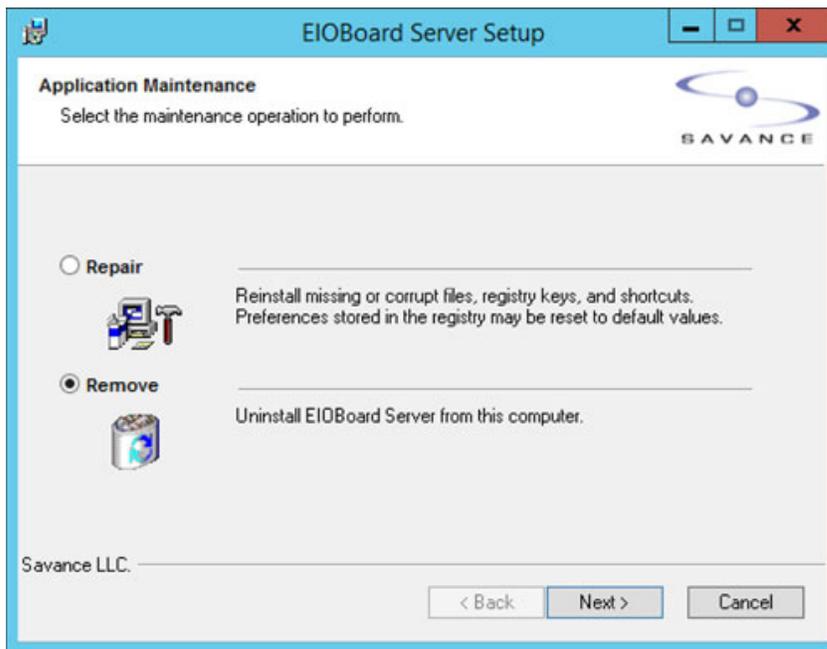
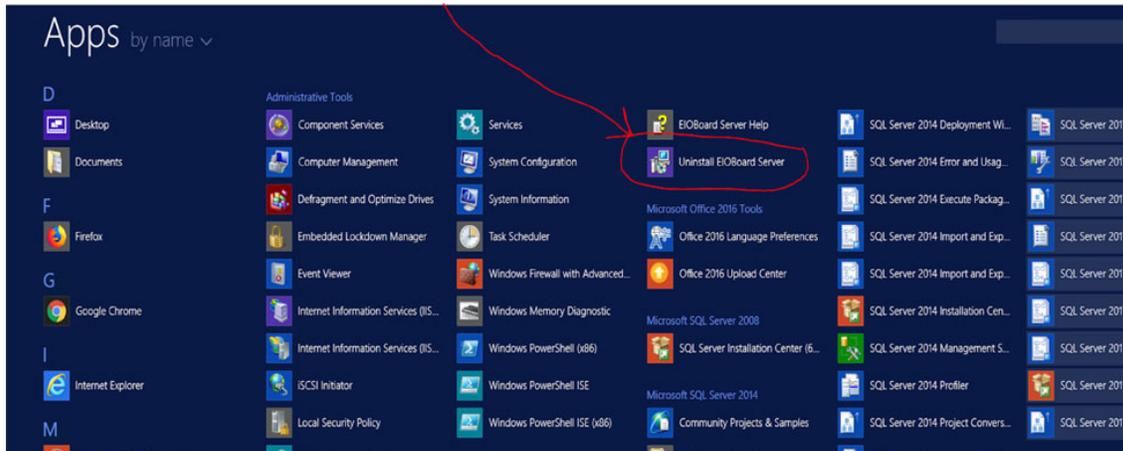
Click Add to add your database from the backup location from step 4.

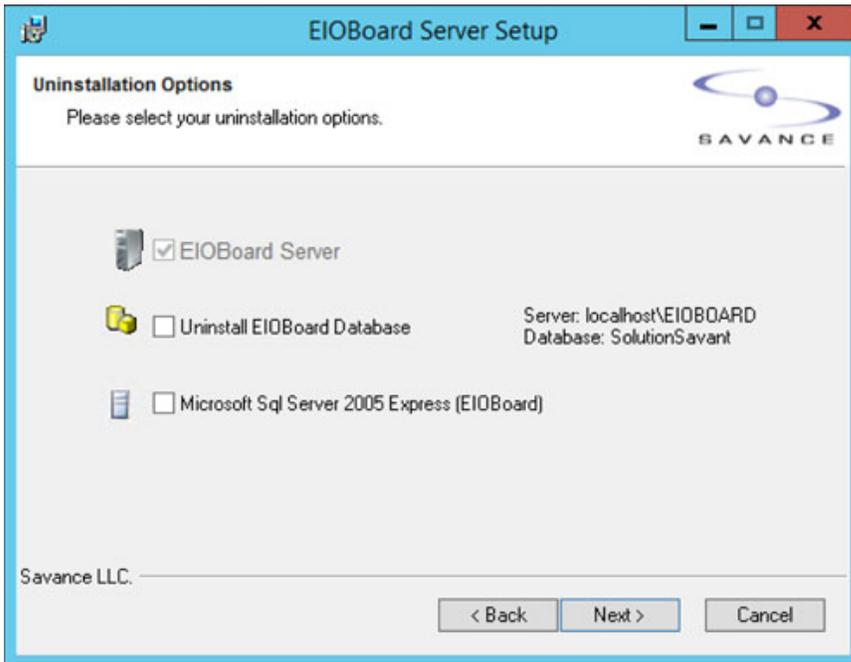


After you choose the database and click ok to close the select backup devices window, the restore database window should look something like the image below. Click ok to restore. **Note the database name.**

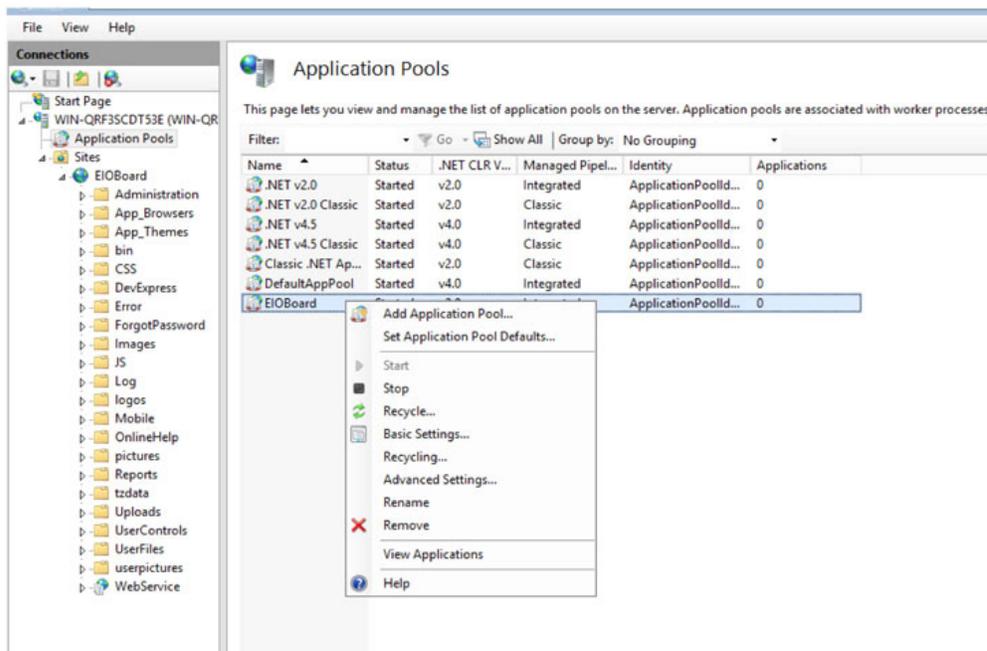


5. After the restore, Uninstall EIOBoard using the uninstaller in the start menu. If the EIOBoard database installed on SQL 2005 and there are no other databases in use from that SQL instance you can allow the EIOBoard uninstaller to uninstall SQL for you.

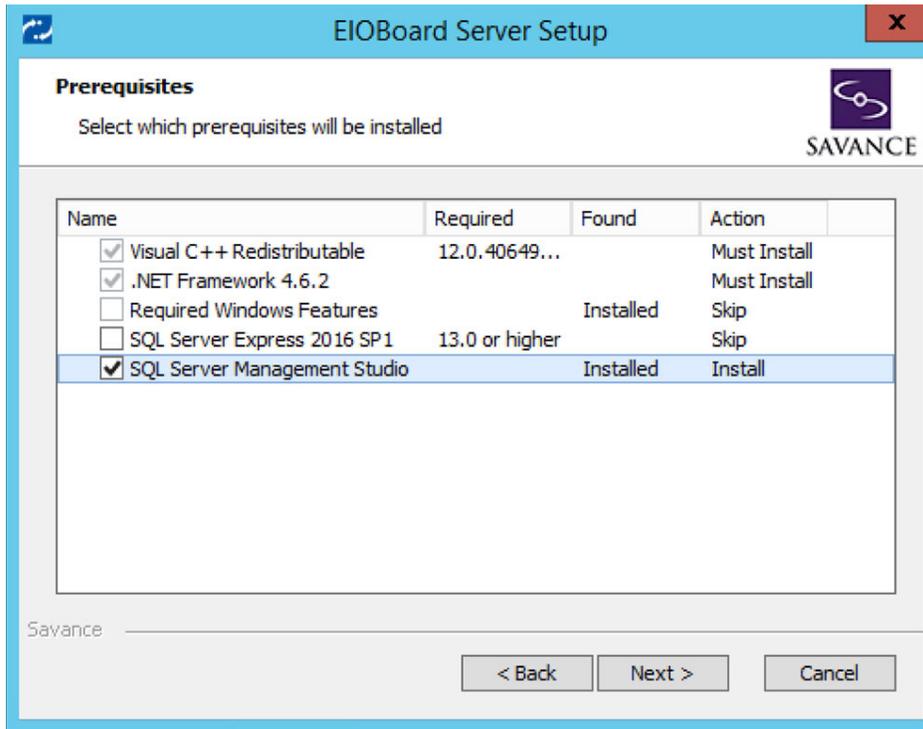




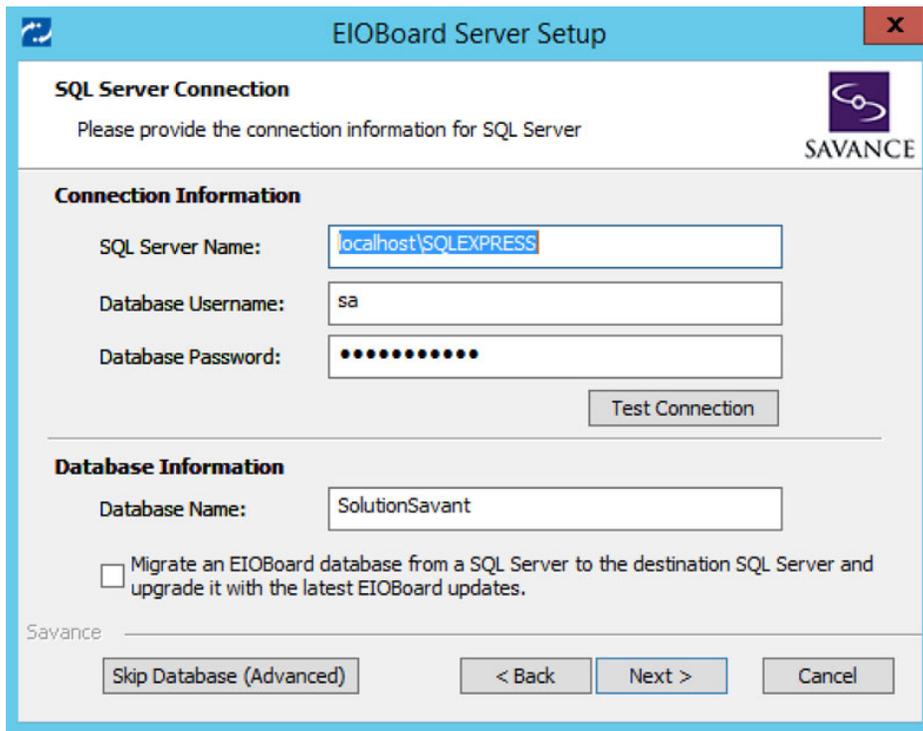
6. Delete The EIOBoard App Pool from IIS by going to Application Pools => Right click on the EIOBoard app Pool, and choose Remove. Make sure to note down the port number and parent directory (if any) of the EIOBoard website.



7. Install the new version. Uncheck the option to install SQL. The install of SQL Management Studio has already been done and is no longer necessary. Uncheck the option to install it and SQL Server Express. During the installation process, point the new installer to the current database and allow it to upgrade the database. Make sure to create the EIOBoard site to the same port or in the same parent directory as it was already installed previously.



After entering your install key, you will be at the screen where you will enter the SQL connection information from the Database tab of the settings in your old installation. The example below uses the defaults. After inputting those settings, click Test Connection to make sure they are correct.



EIOBoard Server Setup

SQL Server Connection
Please provide the connection information for SQL Server

Connection Information

SQL Server Name: localhost\SQLEXPRESS

Database Username: sa

Database Password: ●●●●●●●●

Test Connection

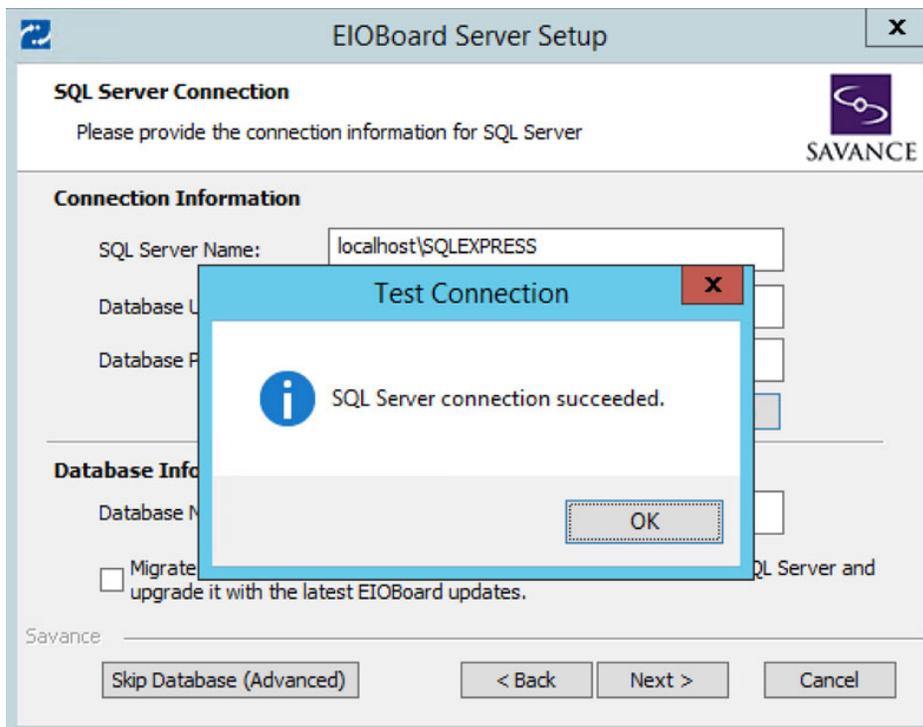
Database Information

Database Name: SolutionSavant

Migrate an EIOBoard database from a SQL Server to the destination SQL Server and upgrade it with the latest EIOBoard updates.

Savance

Skip Database (Advanced) < Back Next > Cancel



EIOBoard Server Setup

SQL Server Connection
Please provide the connection information for SQL Server

Connection Information

SQL Server Name: localhost\SQLEXPRESS

Database Username: sa

Database Password: ●●●●●●●●

Test Connection

Database Information

Database Name: SolutionSavant

Migrate an EIOBoard database from a SQL Server to the destination SQL Server and upgrade it with the latest EIOBoard updates.

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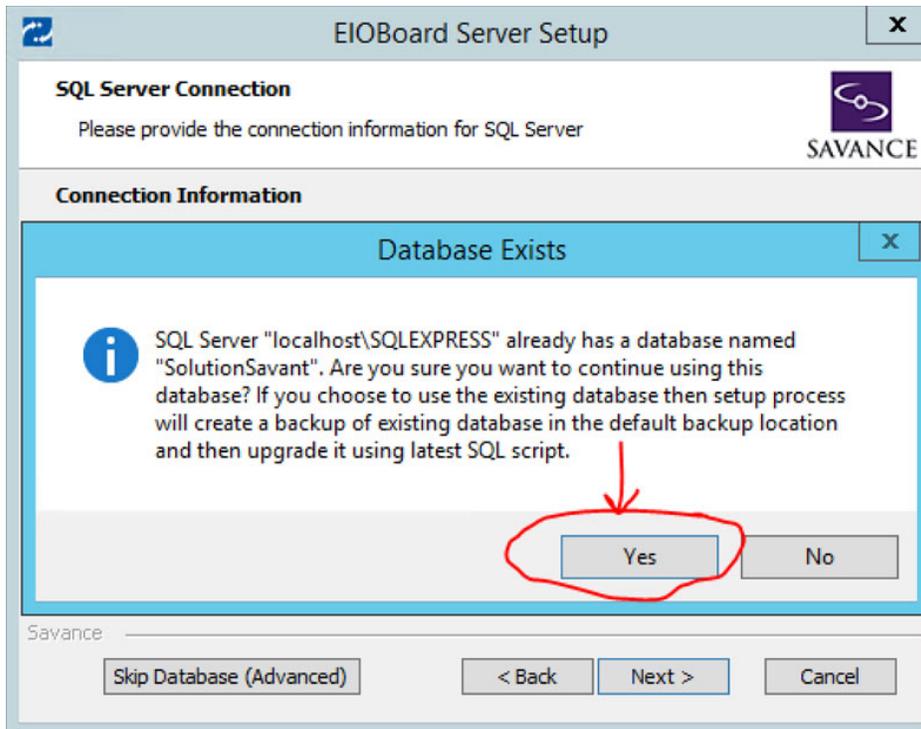
Skip Database (Advanced) < Back Next > Cancel

Test Connection

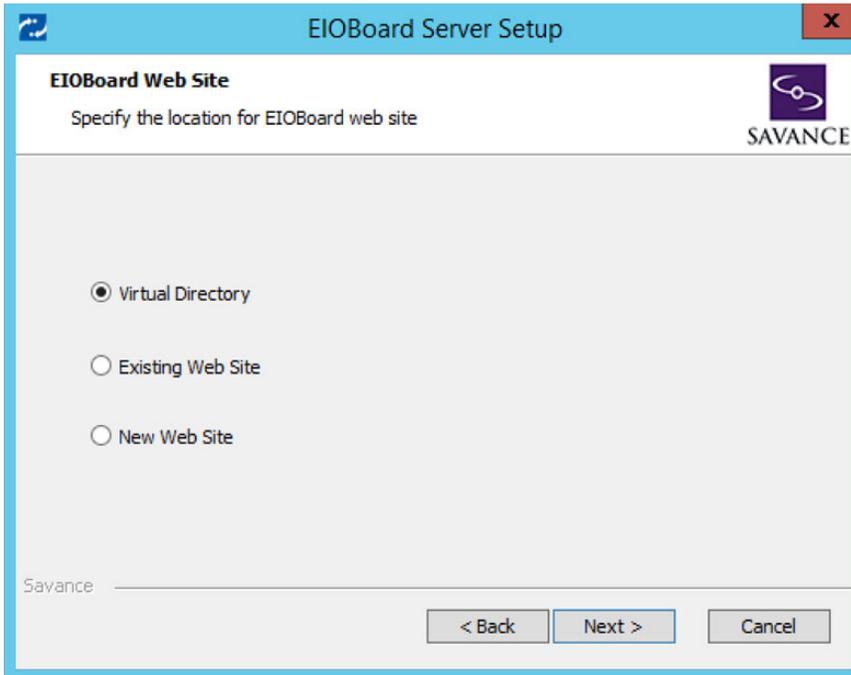
SQL Server connection succeeded.

OK

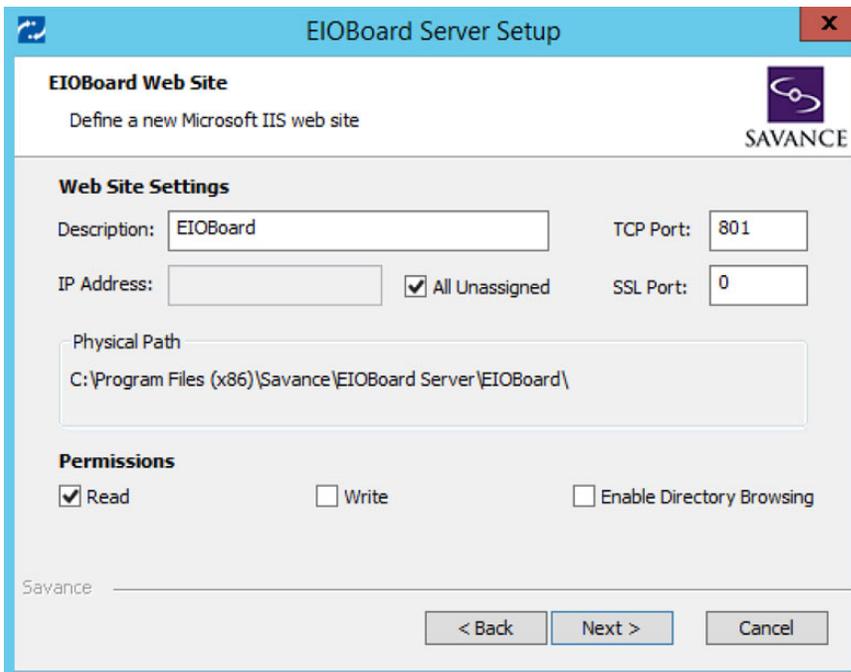
Press Next. After you press Next, you will be asked if you wish to upgrade the existing database. Choose Yes.



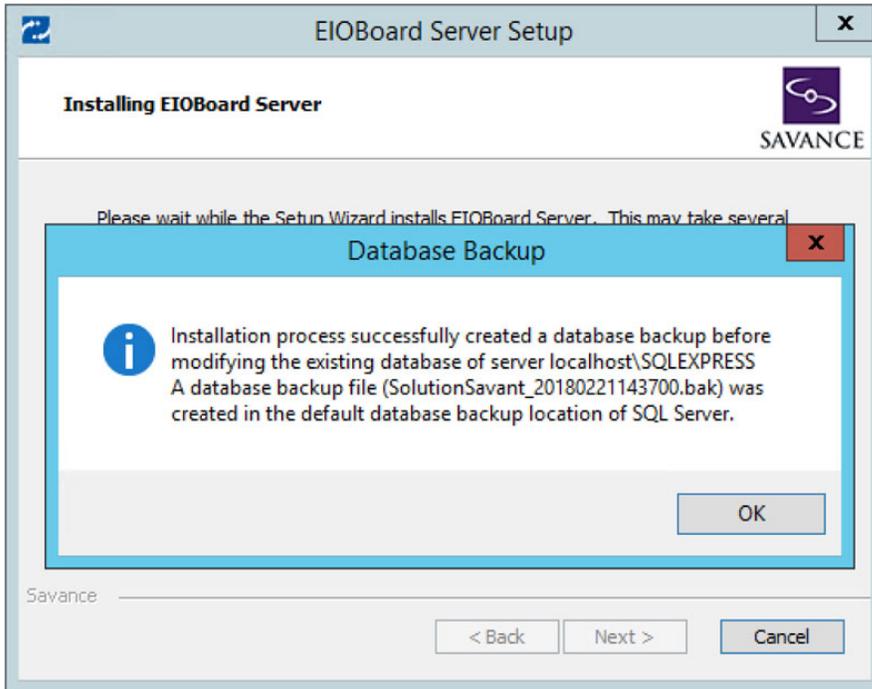
Now you will be at the screen where you choose how you want to create the EIOBoard site. The setup you noted from IIS in the beginning will determine what you choose here. If your site was standalone on its own port rather than a virtual directory, choose New Web Site. See image below.



Make sure you assign it to the same port you noted from the previous installation. This example uses the default port for EIOBoard port 801:

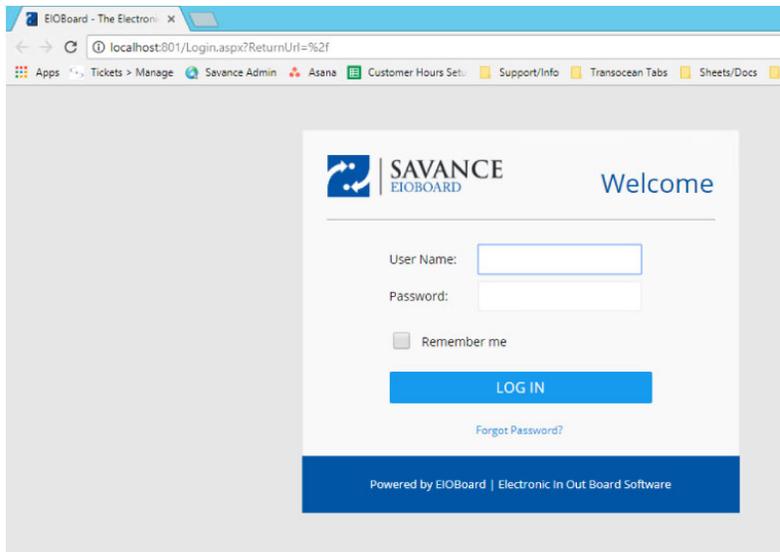
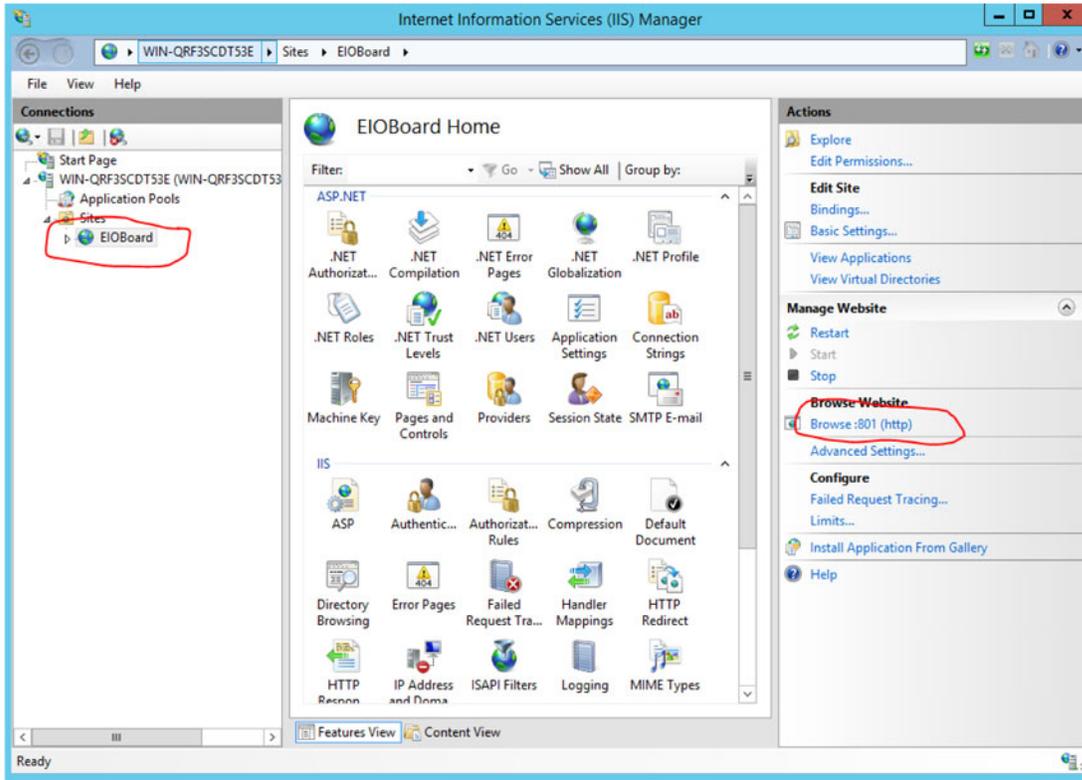


Hit Next and the install/upgrade will begin with a database backup:

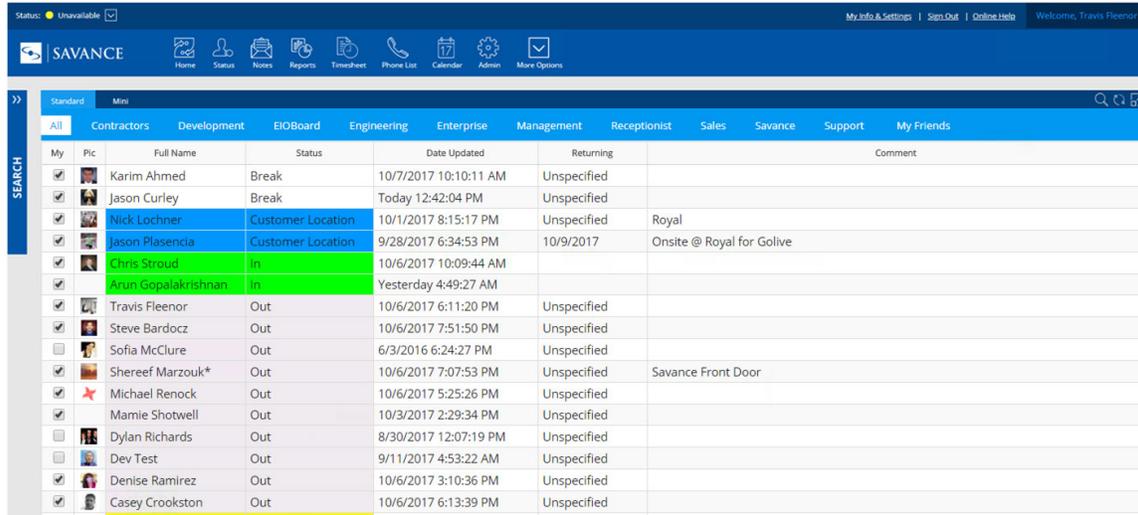


During install, the database will be automatically upgraded with the improvements made for this version of EIOBoard. After you click Finish, the EIOBoard Server Admin will open. At this point you will enter in all the settings you made a note of, in Management => Settings. If you sync with Active Directory, make sure you check the box marked "Validate Credentials with Active Directory" under Management => Settings => AD Sync => Options.

To verify that the installation was successful, check your client connections (See image below). You can also go to IIS, click on the EIOBoard site, and then click Browse to open the web application.



After a successful login, enjoy the new EIOBoard interface:



The screenshot displays the EIOBoard v10 interface. At the top, there is a navigation bar with the SAVANCE logo and various utility icons (Home, Status, Notes, Reports, Timesheet, Phone List, Calendar, Admin, More Options). The user's status is shown as 'Unavailable'. Below the navigation bar, there is a search bar and a list of categories: Contractors, Development, EIOBoard, Engineering, Enterprise, Management, Receptionist, Sales, Savance, Support, and My Friends. The main content area shows a table of user status information.

My	Pic	Full Name	Status	Date Updated	Returning	Comment
<input checked="" type="checkbox"/>		Karim Ahmed	Break	10/7/2017 10:10:11 AM	Unspecified	
<input checked="" type="checkbox"/>		Jason Curley	Break	Today 12:42:04 PM	Unspecified	
<input checked="" type="checkbox"/>		Nick Lochner	Customer Location	10/1/2017 8:15:17 PM	Unspecified	Royal
<input checked="" type="checkbox"/>		Jason Plasencia	Customer Location	9/28/2017 6:34:53 PM	10/9/2017	Onsite @ Royal for Golive
<input checked="" type="checkbox"/>		Chris Stroud	In	10/6/2017 10:09:44 AM		
<input checked="" type="checkbox"/>		Arun Gopalakrishnan	In	Yesterday 4:49:27 AM		
<input checked="" type="checkbox"/>		Travis Fleenor	Out	10/6/2017 6:11:20 PM	Unspecified	
<input checked="" type="checkbox"/>		Steve Bardocz	Out	10/6/2017 7:51:50 PM	Unspecified	
<input type="checkbox"/>		Sofia McClure	Out	6/3/2016 6:24:27 PM	Unspecified	
<input checked="" type="checkbox"/>		Shereef Marzouk*	Out	10/6/2017 7:07:53 PM	Unspecified	Savance Front Door
<input checked="" type="checkbox"/>		Michael Renock	Out	10/6/2017 5:25:26 PM	Unspecified	
<input checked="" type="checkbox"/>		Mamie Shotwell	Out	10/3/2017 2:29:34 PM	Unspecified	
<input type="checkbox"/>		Dylan Richards	Out	8/30/2017 12:07:19 PM	Unspecified	
<input type="checkbox"/>		Dev Test	Out	9/11/2017 4:53:22 AM	Unspecified	
<input checked="" type="checkbox"/>		Denise Ramirez	Out	10/6/2017 3:10:36 PM	Unspecified	
<input checked="" type="checkbox"/>		Casey Crookston	Out	10/6/2017 6:13:39 PM	Unspecified	