

#### SAVANCE EIOBOARD

# EloBoard 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 ElOBoard is on, single left click on the ElOBoard site and look on the right hand side under browse for the port (the example below shows port 801).

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

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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.* 



## **ElOBoard v9 to v10 Upgrade with SQL**

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- **3.** Install and configure SQL 2017.
  - 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-sqlserver-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.

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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.

8	Server Properties - SRV-CI-LICN-01\SQLEXPRESS
Select a page	🕂 Solpt 🝷 😧 Help
& Processon & Security	Server authentication
& Database Settings	SQL Server and Windows Authentication mode
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	Failed logins only
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Progress	
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	OK Cancel



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







12. 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.

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13. 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/Vie w/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.

8	Restore Database -	- • ×
😵 No backupset selected to be restored		
Select a page # General # Files # Options	Script -  Help Source Database: Database: Database: Database: Restore plan Backup sets to restore: Restore Name Component Type Server Database Position First LSN Last LSN Checkp	Timeline.
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Click Add to add your database from the backup location from step 4.

-	Select backup devices	_ <b>D</b> X
Specify the backup med	ia and its location for your restore operation.	
Backup media type:	File	
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C:\Program Files\Micros	oft SQL Server\MSSQL14.SQLEXPRESS\MSS	Add
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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.** 

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**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.





	EIOBoard Serv	er Setup 📃 🗖 🗙
Unins Pl	tallation Options ease select your uninstallation options.	BAVANCE
	<ul> <li>ElOBoard Server</li> <li>Uninstall ElOBoard Database</li> <li>Microsoft Sql Server 2005 Express (I</li> </ul>	Server: localhost\EIOBOARD Database: SolutionSavant EIOBoard)
Savanc	e LLC.	< Back Next > Cancel

**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.

Connections S 🔄   🖄   🔗 - 🍕 Start Page	Applicat	ion Poo	DIS age the list of ap	oplication pools on	the server. Application	pools are associa	ited with worker proc
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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.

2	EIOBoard Server Setup					
-	Prerequisites Select which prerequisites will be installe	ed		SAVANCE		
	Name Visual C++ Redistributable NET Framework 4.6.2 Required Windows Features	Required 12.0.40649	Found	Action Must Install Must Install Skin		
	SQL Server Express 2016 SP1	13.0 or higher	Installed	Skip Install		
Sav	ance					
		< Back	Next >	Cancel		

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.



# **EloBoard v9 to v10 Upgrade with SQL**

2	EIOBoard Server Setu	p	x				
SQL Server Connection Please provide the connection	on information for SQL Server		SAVANCE				
Connection Information							
SQL Server Name:	localhost\SQLEXPRESS						
Database Username:	sa						
Database Password:	•••••						
		Test Connection					
Database Information							
Database Name:	SolutionSavant	]					
☐ Migrate an EIOBoard of upgrade it with the lat	Migrate an EIOBoard database from a SQL Server to the destination SQL Server and upgrade it with the latest EIOBoard updates.						
Savance	d) < Back	Next >	Cancel				
2	EIOBoard Server Setu	ıp	x				
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SQL Server Connection     SQL Server       Please provide the connection information for SQL Server     SAVANCE						
Connection Information						
SQL Server	Name:	localhost\SQLEXPRESS	7			
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Skip Datab	ase (Advanc	ed) < Back Next >	Cancel			



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

C EIOBoard Server Setup	x				
SQL Server Connection     SQL Server       Please provide the connection information for SQL Server     SAVA					
Connection Information					
Database Exists	x				
SQL Server "localhost\SQLEXPRESS" already has a database named "SolutionSavant". Are you sure you want to continue using this database? If you choose to use the existing database then setup process will create a backup of existing database in the default backup location and then upgrade it using latest SQL script.					
Yes No					
Savance Skip Database (Advanced) < Back Next > Cancel					

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.



C ElOBoard Server Setup	x
EIOBoard Web Site Specify the location for EIOBoard web site	SAVANCE
Virtual Directory	
O Existing Web Site	
O New Web Site	
Savance	
< Back Next >	Cancel

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:

2	EIOBoard Server Setup	x
EIOBoard We Define a ne	eb Site w Microsoft IIS web site SAV	م ANCE
Web Site Se	ettings	
Description:	EIOBoard TCP Port: 801	
IP Address:	All Unassigned SSL Port: 0	
Physical Pa C: \Program	th Files (x86)\Savance\EIOBoard Server\EIOBoard\	
Permission	S 🗌 Write 🗌 Enable Directory Brow	sing
Savance	< Back Next > Canc	el



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

2	EIOBoard Server Setup	x
Installing	EIOBoard Server	SAVANCE
Please	wait while the Setup Wizard installs FIOBoard Server. This may take se Database Backup	x
0	Installation process successfully created a database backup befor modifying the existing database of server localhost\SQLEXPRES A database backup file (SolutionSavant_20180221143700.bak) w created in the default database backup location of SQL Server.	ore S as
		ж
Savance —	< Back Next >	Cancel

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.



# **EloBoard v9 to v10 Upgrade with SQL**

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After a successful login, enjoy the new ElOBoard interface:

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			Arun Gopalakrishnan	In	Yesterday 4:49:27 AM		
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		8	Steve Bardocz	Out	10/6/2017 7:51:50 PM	Unspecified	
			Sofia McClure	Out	6/3/2016 6:24:27 PM	Unspecified	
			Shereef Marzouk*	Out	10/6/2017 7:07:53 PM	Unspecified	Savance Front Door
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