

Calm v11 Installation/Upgrade Guide

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Calm installation and upgrade

PLEASE READ THESE INSTRUCTIONS IN FULL BEFORE COMMENCING ANY PART OF THE CALM V11 INSTALLATION OR UPGRADE.

ONCE CALM HAS BEEN UPGRADED TO VERSION 10 (OR ABOVE) IT IS IMPOSSIBLE TO REVERT THE DATA BACK TO VERSION 9.X DATA FORMAT. THE ONLY WAY TO REVERT BACK TO VERSION 9.X DATA FORMAT IS TO RE-INSTALL VERSION 9.X AND RESTORE DATA FROM A BACKUP TAKEN BEFORE THE VERSION 10 (OR ABOVE) UPGRADE.

Pre-installation notes

Installation or upgrade?

Your installation process will be slightly different depending on exactly what you need to do. There are three likely scenarios:

- You are installing Calm v11 onto a server that has never held Calm before (a 'fresh' installation)
- You are upgrading Calm v10 or above to Calm v11
- You are upgrading Calm v9.0-9.3 to Calm v11

All three follow the same general process, but if you are upgrading from Calm v9.0-9.3 you will need to do an extra step at the end: run the upgrade utility.

If you are running a version of Calm before v9.0, please check with the Helpdesk before starting the upgrade process as some of the instructions below may differ. This is also the case if you are using the upgrade process as an opportunity to move Calm to a different server.

Server specifications

The Axiell helpdesk can provide up to date information on recommended server specifications, but as a rule we would normally expect something of the order of:

- Windows 2008R2/2012 operating system
- 8Gb RAM
- 2 x quad core processors
- Enough disk space for the application files (50Mb), database files (allow 2-3Mb per 1000 records) and any digital content stored on the server and linked to Calm
- .NET v3.5 or above

Upgrade Utility

This is only necessary if you are upgrading Calm v9.0-9.3. If you are upgrading v10 or above, or installing a new Calm system, you can ignore the Upgrade Utility.

The Calm Upgrade Utility shortcut will be installed as part of the server/standalone installation and is used only when you are upgrading an existing v9.0-9.3 application. It will perform upgrade tasks, including re-indexing of all databases and migration of data in the security

database. Note that due to the varied ways that customers may have set security, we cannot guarantee that all security settings stored in v9.0-9.3 will be re-created. Customers who have set security using Admin module and/or Calm security database should check settings carefully and may have to re-create if necessary.

Similarly, the Upgrade Utility will scan the server registry for any Calm database settings. If there are any databases recorded in the registry which no longer exist in the application folders e.g. old copies of Calm not removed properly, bespoke modules no longer in use, etc., then the Upgrade Utility may have to be run several times.

Customers may therefore choose to perform a manual re-index of all databases and then re-create security from scratch if they have set security previously, rather than use the Upgrade Utility.

Re-indexing

The implementation of Unicode within the software in v10 requires all databases to be re-indexed on upgrade from a pre-v10 version. This can be done either by running the Upgrade Utility or by choosing to re-index via the Admin module.

Once the data has been re-indexed to v11, it cannot be reverted back to a pre-v10 version. Any requirement to revert to a previous version would need to be carried out using a backup of data held pre-v10.

Installation/upgrade process

Step 0 - Before you begin

Before starting the server installation/upgrade you will need:

- Server of recommended specification.
- Administrator access rights to the server.
- V11 installation software for all necessary software. Note there are separate installation files for Calm (which includes ImageView, Images database, and performance module), CalmView, OAI and Calm-API.
- V11 passwords.
- Valid licence key (for new installations only).

Software, passwords and licence keys are available from the Helpdesk and documentation is available from www.dswebhosting.info/documents.

If you are running more than one Calm application on the server e.g. ALM, Records, Library, please repeat this process for each application.

Upgrade only

If you are upgrading an existing Calm installation:

- All users should have exited Calm.
- The Dscribe Server/2 Windows Service should be stopped prior to upgrade, but the upgrade process will also do that automatically if it is still running.
- Upgrade over the existing application(s) and to the same server location. If you want to upgrade to a new location please contact the helpdesk.

Upgrade only

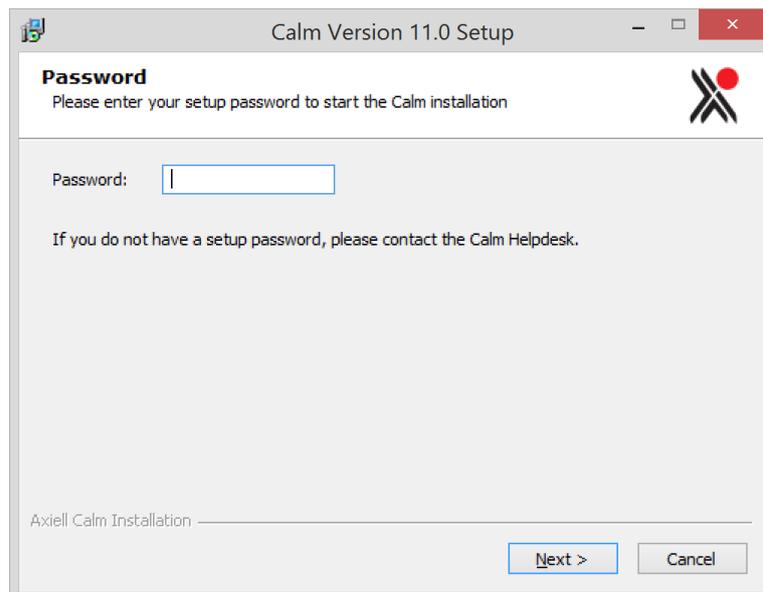
- Upgrade the server components first, immediately followed by clients.
- Upgrade all components at the same time (multiple Calm applications, add-on modules, CalmView, etc).
- CalmView must be upgraded before copying any data across to the web server if it is running a copy of the Calm database(s).

If you are upgrading an existing Calm application you must take a back-up of the Dscribe application folder and sub-folders on the server (or PC for standalone applications) and which includes the application db folder. All Calm data is stored in the db folder and it is **CRITICAL** that you have a copy to restore back to in the event of a problem with the installation/upgrade. **Axiell cannot accept responsibility for any data loss where customers do not have a current back-up that they are sure they can safely restore to.**

If anything untoward or unexpected happens, or you are unsure if the installation / upgrade process has completed, please contact the Helpdesk.

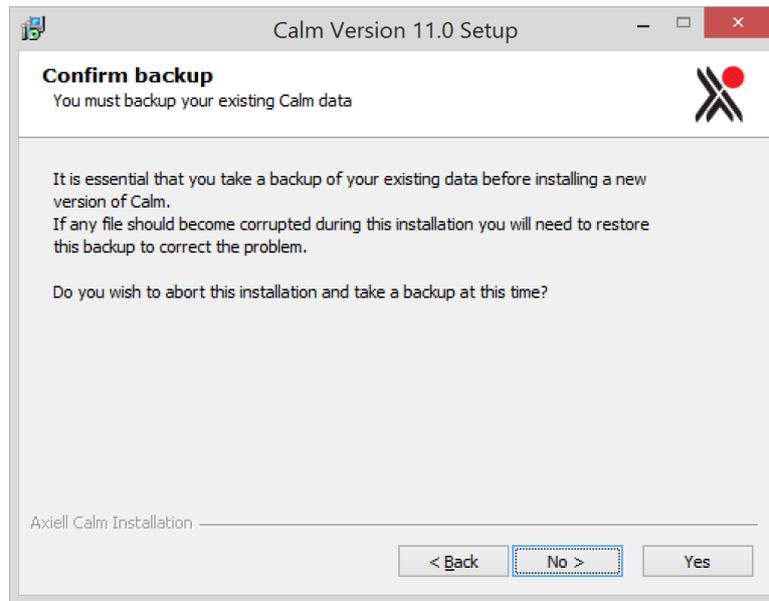
Step 1 - Server

Copy the Calm v11.0.x64.Unicode.exe file onto the server and double click to start. If you are installing a client-server version of Calm, the server copy must be installed before the client copies can be.



Enter the relevant password for a v11 server copy of your version of Calm. Click Next.

You will be asked to confirm that you have taken a back-up of the existing Calm application.

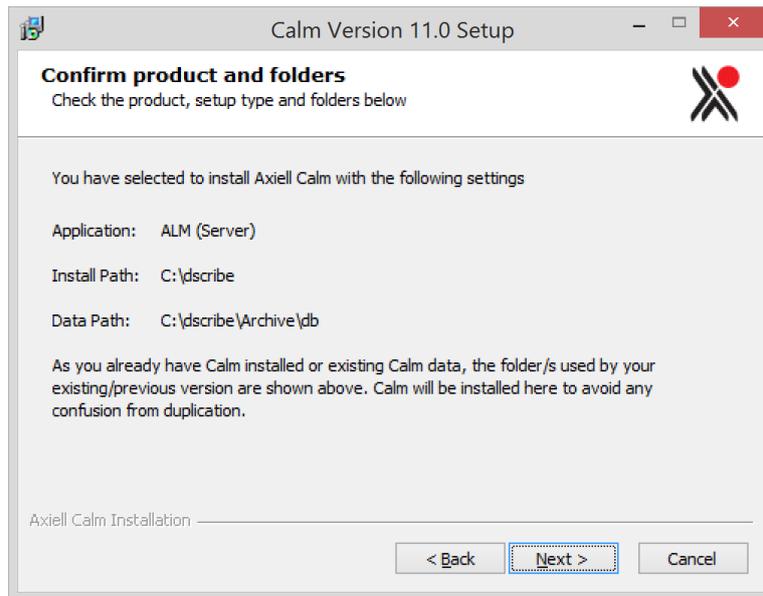


Click No if you wish to continue.

Upgrade only

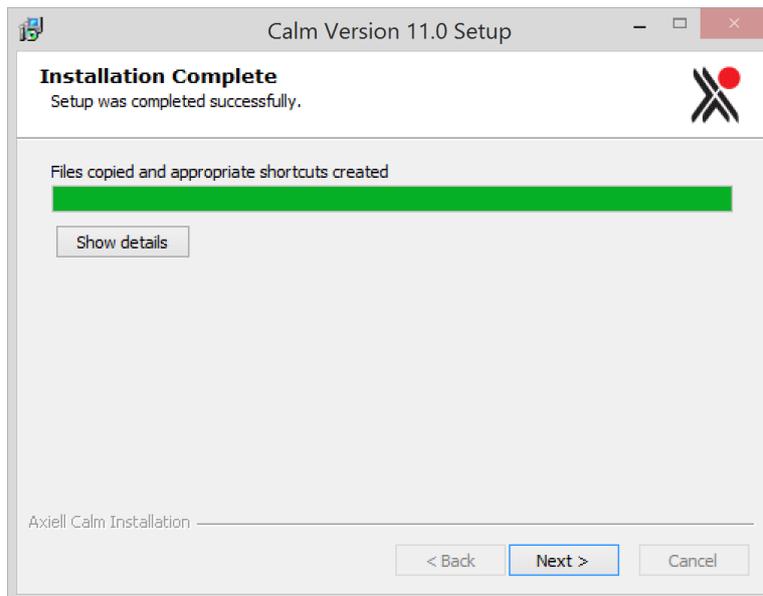
The screenshot shows a Windows-style dialog box titled "Calm Version 11.0 Setup". The main heading is "Stopping the service" with the subtext "This service must be stopped before continuing with the install". The body text reads: "An existing service called Disservi2 has been detected, this service needs to be stopped whilst the install takes place. Press the Install button to automatically stop the service. If you would prefer to stop the service manually, press Cancel to abort the installation, you will then need to stop the service before installing again.". At the bottom, there are three buttons: "< Back", "Install" (which is highlighted with a blue border), and "Cancel". The footer text reads "Axiell Calm Installation".

If there is an existing version of the application being installed, and the existing DDescribe Server/2 Service is still running you will have the opportunity to abort the installation and do a manual stop of the Service, or alternatively let the installation process close the Service automatically. If the Service has already been stopped you will go straight to the screen below. The installer will detect any existing installation of the application being upgraded.



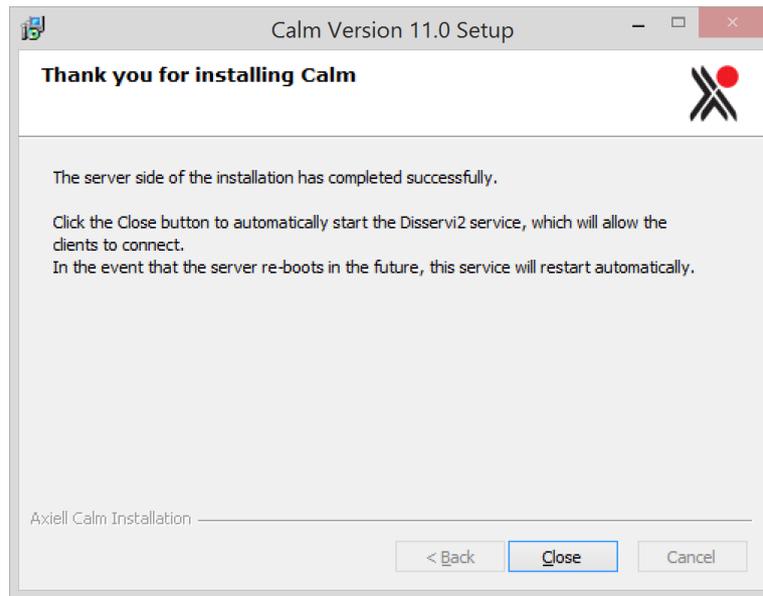
Click Next.

The installer will run through the installation/upgrade process and then display a completed message.



Click on Next to complete the Server installation.

You will get a dialogue box to start (or restart) the Disservi2 Service depending on whether it was running before the installation. This service displays in the Services box in Control Panel as the Dscribe Server/2 Service.

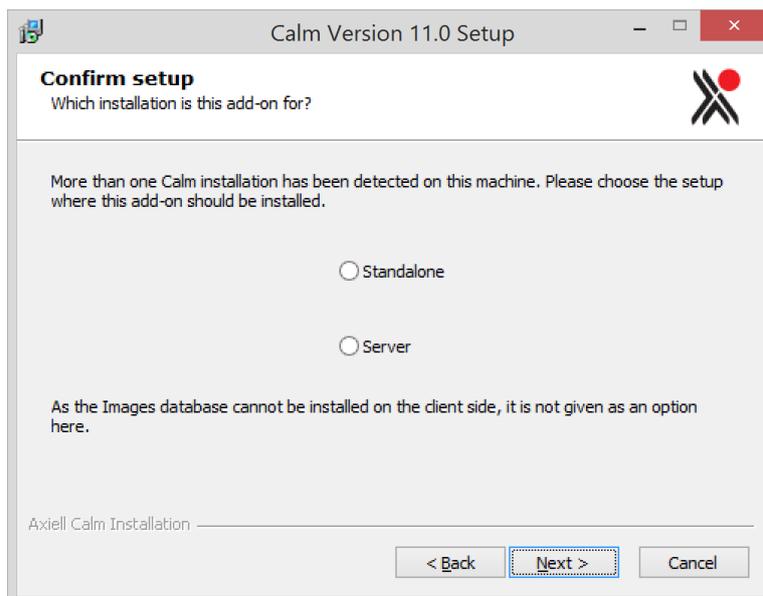


The Calm server components for v11 have now been installed. Please check that the DSCRIBE Server/2 Service is running on the server.

Repeat this process with appropriate passwords if you have more than one Calm application (ALM, Records, Library).

Step 2 – Images / Performance modules

If you have a licence for the Images database and/or the Performances database, repeat Step 1 above with the appropriate passwords. If you have not purchased Images or Performances modules, you can ignore this step (images can be attached to Calm records without the Images module). If Calm detects more than one type of installation on a PC/server you may see an option similar to below:



For a network installation of Calm you should choose the Server option and follow the rest of the Step 1 process above.

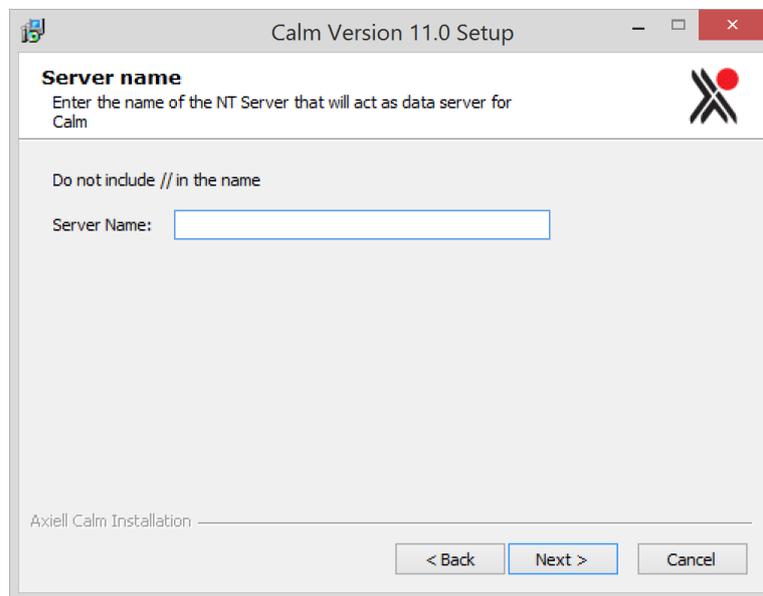
Step 3 - client

To install the client(s), for each client PC do the following:

Copy the Calm v11.0.x64.Unicode.exe file either to the local PC or to a network location that the client PC can see. On the client PC browse to the Calm v11.0.x64.Unicode.exe file, double click and enter the appropriate password.

You will see the same backup warning message displayed with the server installation. Continue with the installation.

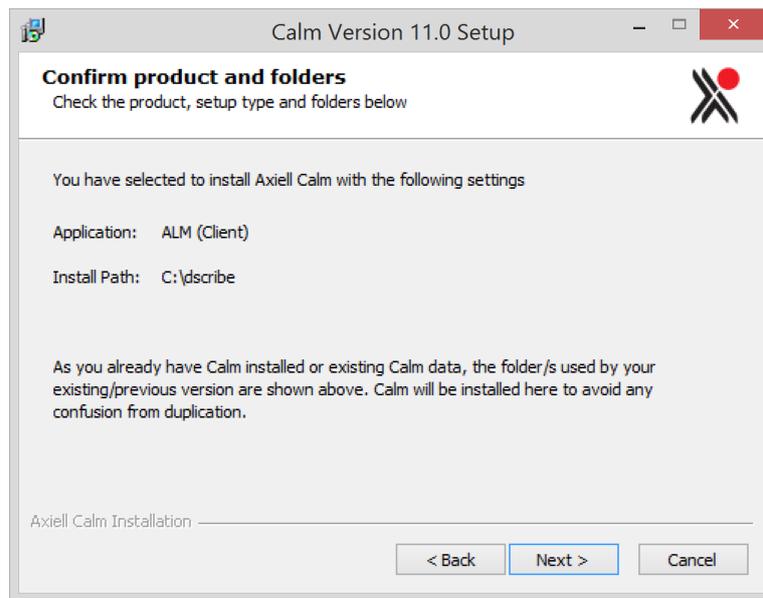
At the next dialogue box you need to enter the name of the server in Step 1 above. Note the dialogue box refers to NT Server, please ignore this.



If you are running client/server on the same PC/server then enter localhost as the server name, otherwise, enter the name of the server here.

Click Next.

At the next dialogue box, check that the details are as expected.



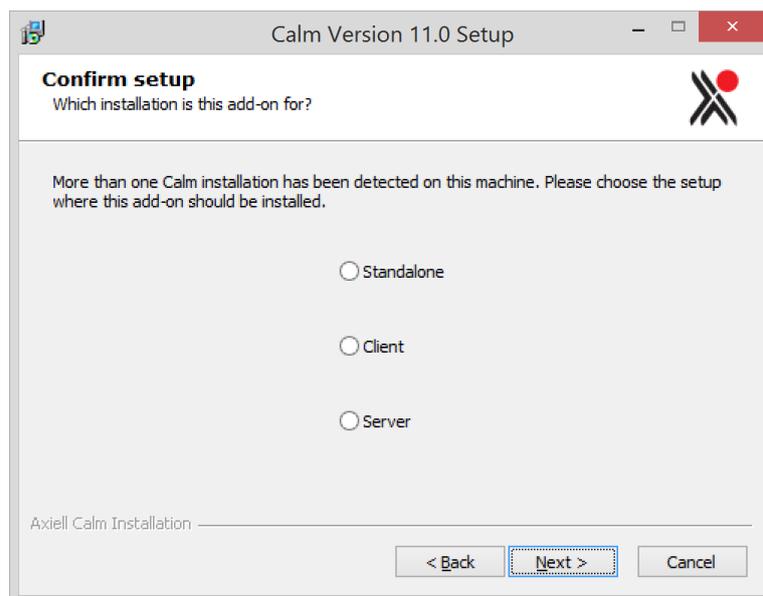
Click Next.

You will see the same progress and installation complete message boxes as in Step 1. A folder group called Program Files / Axiell / Calm is created with relevant shortcuts.

Any old icon groups should be deleted.

Step 4- ImageView

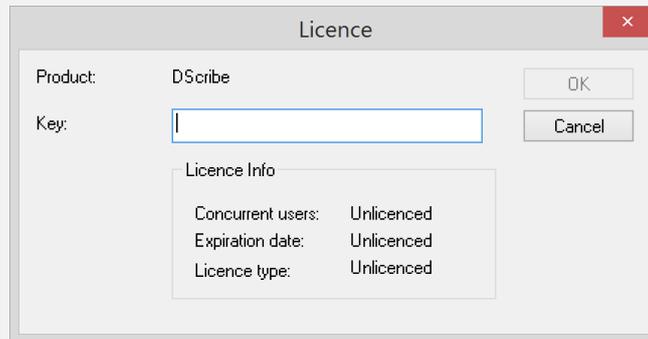
Run the Calm v11.0.x64.Unicode.exe file again with the appropriate password. For ImageView installation, depending on whether you are installing Calm on a standalone Pc, or a client PC or directly on the server you may see the following dialog box:



Choose the appropriate option and click Next to follow the rest of the Step 1 installation process.

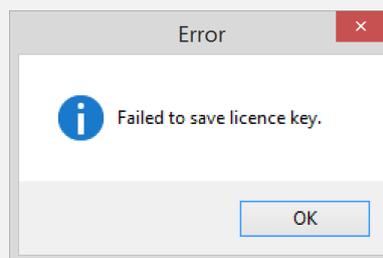
Step 5 - Licence Key

If this is a new installation (standalone, client or server) you will have to enter the licence key when you first run the Calm application shortcut. You should not have to do this for an upgrade.



Fresh installation only

If you enter a valid key, click OK, and see an error message (as below), you will have to run Calm as an administrator. To do this, right-click on the shortcut and choose "run as administrator" or log in as an administrator in order to enter the licence key.



Technical information about the installation

- Networking protocol – TCP/IP
- Service installed (server only) – Dscribe Server/2 (automatic)
- Ports used – TCP ports 2143, 2144, 2145
- Shortcut locations – Start>Programs>Axiell>Calm

At this stage in the installation, those doing a fresh installation and those doing an upgrade from Calm v10 or higher can stop. Step 6, the Upgrade Utility, is only necessary if you are upgrading from v9.0-9.3

Step 6 - Upgrade Utility

We recommend that you do not run this routine until you have upgraded all Calm applications (ALM, Records, Library) on the server.

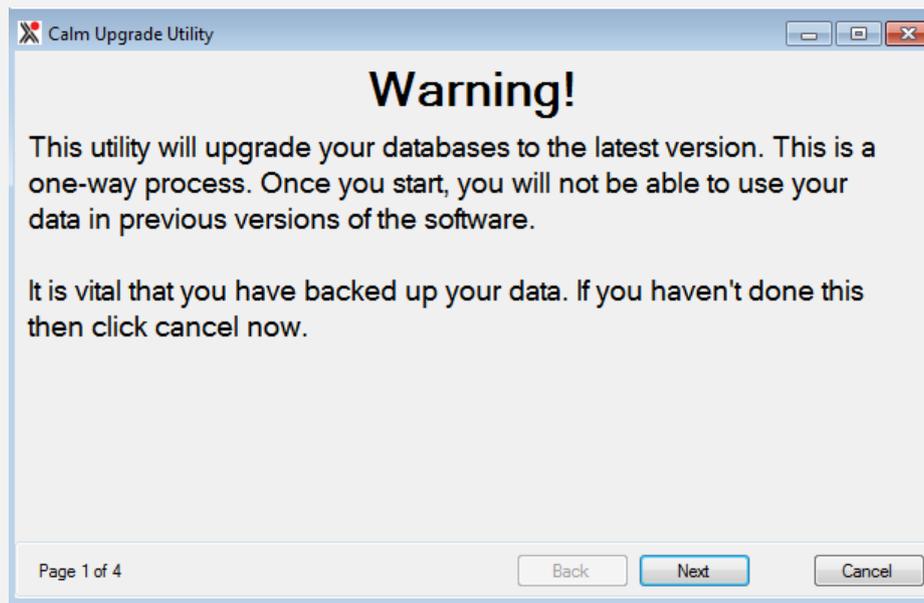
Two of the main changes in Calm v10 are the introduction of Unicode into the application indexes and revision of the security model in Calm (away from the two layer Admin module security and the Calm application Security database, into one security component accessed through Admin).

The Upgrade Utility is designed as a single point process for re-indexing the data and recreating any security settings.

It is accessed from a shortcut called "Upgrade Utility" created in Programs>Axiell>Calm on the Server.

Note: both re-indexing and re-applying security can be done manually.

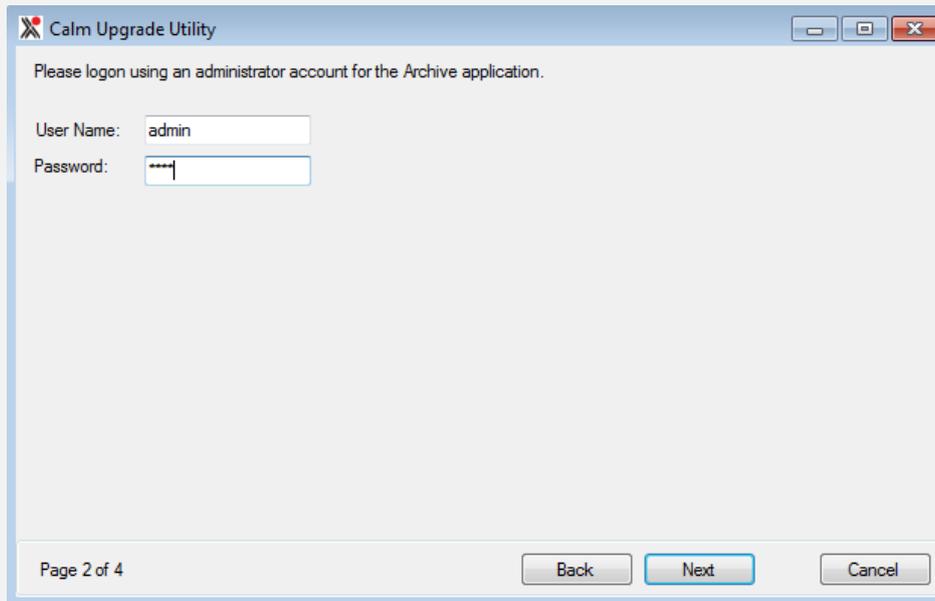
Double click in the Upgrade Utility shortcut. The warning message below is displayed:



Click Next to continue or Cancel to abort the process.

You will be asked to enter the user/password combination for the Admin utility.

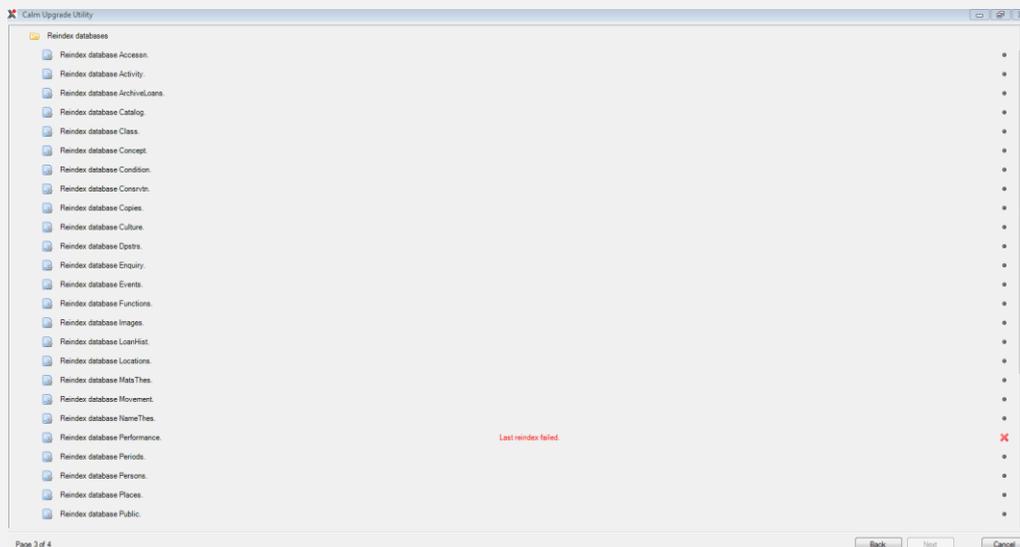
Upgrade from v9.0-9.3 only



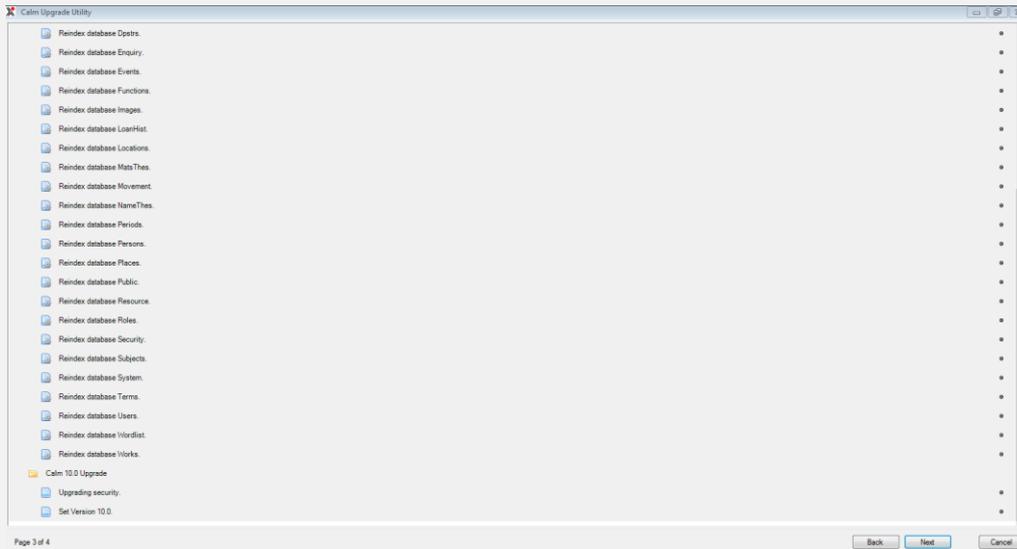
Upgrade from v9.0-9.3 only

This box will be repeated for each Calm application found on the server.

The utility will scan the server (or PC registry for standalone installations) for any Calm databases recorded there and which have not already been upgraded to v10 or above. If it cannot find a database or there is anything unexpected, it will display a message in red beside that database:

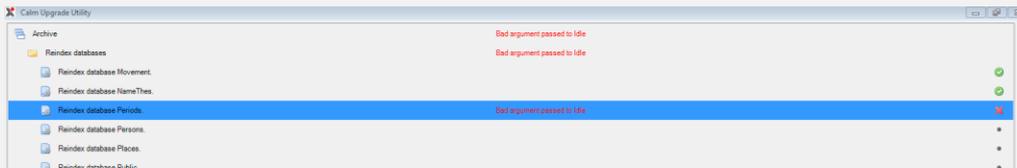


You can either go Back or Cancel but you cannot progress with the upgrade. Typically this will be because there is an old database listed in the registry that is no longer part of the application. This is only likely to happen with old installations and/or old servers. Contact the Helpdesk to remedy any errors before running the process again. Once the check is completed and successful you will be able to click Next.



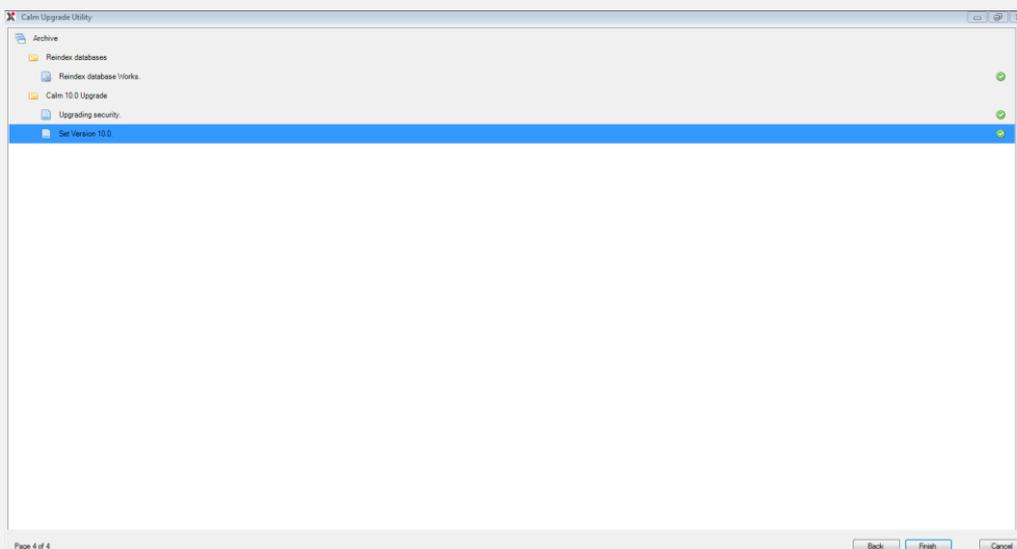
The Utility will run through each database in turn to re-index and flag it as complete with a green tick icon. If a database fails to re-index the process will stop and you will have to contact the Helpdesk to discuss and resolve the re-index problem. An example might be:

Upgrade from v9.0-9.3 only



You will have to run the Upgrade Utility again, but note that the database list will only show those databases still to be re-indexed. Those that have been re-indexed already are now flagged as v11 compatible and do not appear.

Security carried over from v9.x will be set (but not the earlier qualifier about whether this will need to be re-visited manually).



When everything has been completed you will be able to click Finish.

Calm v11 should now be ready to use.

If the process stops or aborts unexpectedly then please contact the helpdesk.