



Sage Accpac ERP – Hosted Services

Version Upgrade Checklist (Updated: August 11, 2009)

Prepare for the Upgrade

After reading this entire document, please ensure all of the following steps are taken to prepare your data for the upgrade process.

Important

We strongly recommend a Sage Accpac Certified Consultant performs the upgrade of your hosted application.

- Post or delete all open batches in all the modules.
- Print and clear any bank reconciliation posting journals (required for version 5.4).
- If you use Inventory Control, complete your day end procedures by running the Day End Processing function.
- Run the Data Integrity Check on all databases. If the report contains errors, you will need to correct the problems before proceeding with the upgrade.
- Make a backup copy of the databases for your own reference. You can use the Database Dump utility to do this.
- Make a backup copy of the SITE folder and store it on your I: drive.
- If you are using any custom reports such as checks or invoices, run them with the new version to confirm they will work as you require.
- If you are using any optional modules such as Financial Link Professional, or third-party applications such as MISys or Wellspring PrintBoss, run them with the new version to confirm they will all work as you require.

- If you have any macros designed with Microsoft Excel or VBA, run them with the new version to confirm they will all work as you require. If they do not operate properly with the new version, you will need to modify your macros to work with the new version.

Ready for the Upgrade

Contact Hosted Services through one of the methods listed below when you have completed all items in the “Prepare for the Upgrade” checklist and you are ready to specify a date and time to perform the upgrade.

- Hosted Services Support: 1-877-223-4828
- Email: support.accpaonline@sage.com

The Hosted Services group will then make a backup of your data, provide the necessary new license files, and grant you access to the new versions of the applications at the agreed time.

- The Citrix logins, passwords, and Sage Accpac user IDs will not change.
- You will not need to re-install the Citrix client software if your workstation already has the Citrix client installed.
- The databases, I:\drive content, and printer driver mappings will all remain the same. The only difference is the actual Citrix application. You will now connect to set of servers dedicated for the new version.

There are two ways to perform the upgrade, please advise the Hosted Services Group on how you will perform the upgrade.

Upgrading the Data Offsite (Recommended)

A certified consultant will dump the databases from the hosted servers to their I: drive, transfer the dump files and a copy of the SITE folder to their local drive, and perform the upgrade to the new version in their local environment first. This gives you more control over your data.

Important

Do not perform the database dump and database load functions directly to the local mapped drives. Dump the database first to the I:\drive and then copy the dump files to the mapped local drives.

In cases where you encounter potential data issues during the upgrade process, you may be able to address the problems more quickly.

Warning

We do not have support staff for this type of issue in the evenings or on weekends.

Once the upgrade has successfully completed, the Certified Consultant will then inform Hosted Services when they are ready to switch to the new version and we will grant them access to the new servers. At that time, they will copy the newly upgraded database dump files and the SITE folder to the I:\ drive. The upgraded data will then be load into the new version and the SITE folder will replace the existing SITE folder.

The certified consultant will then verify everything is working properly before advising you to start any processing.

Upgrading the Data on the Hosted Servers

Contact the Hosted Services Group through one of the methods listed below when you have completed all items in the “Prepare for the Upgrade” checklist and you are ready to specify a date and time to perform the upgrade.

- Hosted Services Support: 1-877-223-4828
- Email: support.accpaonline@sage.com

Please keep in mind, even though you can see the icon for the new version on your currently locked desktop in Citrix, you cannot launch Sage Accpac from there. You will need to login to the appropriate version from the links on the main www.accpaonline.com login page.

Once you have connected to a Citrix session, the desktop will look unchanged, except now you will have access to launch the new version.

Sage Accpac will prompt you to activate Administrative Services. Once that has successfully completed, open **Data Activation** and activate the remainder of your modules. You also need to assign security groups to users in the new version.

Important

*The new version of accpac.exe upgrades and modifies the contents of the **SITE** folder. For whatever reason, if you need to revert to the previous version, rename the backup copy of the **SITE** folder to revert it to the previous version.*

Important

Depending how far in the upgrade process you are, if you discover problems you need to correct, you may to have Hosted Services restore your data. The turnaround time for such a request may be long.

If you have further questions about the upgrade process, please contact Customer Support at 1-800-253-1372.

Upgrade Completed

Please inform the Hosted Services Group when you have successfully completed the upgrade. The Hosted Services group will ensure they disable your access to the previous version of the applications at an agreed upon time.