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Client Data System®

# Upgrade Guide

v4.x to v4.3



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## Requirements Checklist

Before beginning the upgrade program, please review the contents of the checklist below and take any necessary actions to ensure a successful upgrade process:

- Network Operating System and version of the Server or Single User computer:**  
\_\_\_\_\_  
(e.g., Windows 98 Second Edition, Windows 2000 Professional, etc.)
- Current location of the CDS program on the Server or Single User computer:**  
\_\_\_\_\_  
(e.g., C:\cdswin, C:\cdswin.svr, F:\apps\cdswin.svr, etc.)
- Current location of Sybase SQL Anywhere on the Server or Single User computer:**  
\_\_\_\_\_  
(e.g., C:\sqlany50, F:\apps\sqlany50, etc.)
- Review the list of known issues relating to CDS version 4.3.** Verify that none of these issues will prevent your office from running at full capacity.
- Ensure that the person performing this upgrade has Administrator or Supervisor rights to the network** and is familiar with the network's operating system (Windows 98, 2000 or XP), protocols, mappings and the current location of the CDS and Sybase SQL Anywhere programs. If this is a Single User installation, ensure that the person performing this upgrade has Administrator or Supervisor rights to the machine where the installation resides.
- Allocate enough time to run through the upgrade** and resolve any unexpected issues that may arise. The time required for this upgrade varies with the size and number of databases. Optimally, choose a time when system downtime will have the least effect on your business.
- Back up the CDSWIN.SVR directory and subdirectories in a network environment, or the CDSWIN directory in the case of a Single User installation, and all of your existing v4.x data and system files.** If the upgrade is interrupted, you will not be able to use CDS without restoring it from a backup. Protecting your data is your responsibility.
- Make note of any **user-created buttons** in CDS so that they can be recreated. **The upgrade overwrites user-created buttons.**
- Use the **Delete Database** function in CDS to **delete any databases that are no longer needed or used.**
- Any **custom Investment Reports need to be backed up.**
- Run a Database Rebuild and a Full Validation prior to the upgrade.** If these processes have been run in the last week, this item can be skipped. Refer to CDS Help for instructions.
- Run HotSync<sup>®</sup> operations at each workstation that uses E-Z Mobile.** Ensure that all new data has been reconciled. Please note that CDS v4.3 **does not** support E-Z Conduit.
- End all MobileMerge sessions.** Refer to the MobileMerge manual for instructions, if necessary. Ensure that all new data has been successfully reconciled from these sessions.
- Log in to each database to be upgraded from the Server workstation.** Databases that have not been logged in to at least once will not be upgraded.
- Ensure that all users log out of CDS.** Ensure that all users understand that once the upgrade begins, database corruption will occur if a user logs into CDS before the upgrade is complete.
- Close all programs** running on the computer, **including all anti-virus programs but not the Sybase SQL Anywhere Server program.**

## Hardware and Software System Requirements

### Minimum/Recommended Hardware for a Server

**400 MHz Pentium-class processor** (1 GHz or higher recommended)

**128 MB of RAM** (512 MB or higher recommended)

**2 GB of free hard disk drive space** for initial installation (6 GB recommended). In addition, plan to maintain additional free hard disk space of approximately four times the size of the CDSWIN directory, including all subdirectories, for program upgrades and database rebuilds. This additional space is still required on the C: drive even if the CDSWIN.SVR directory is maintained on a different drive.

**Microsoft® Windows® 98, 2000, XP, or Server 2003** operating system

CDS runs across Microsoft compatible LANs (Local Area Networks) with the following protocols:

- IPX/SPX compatible protocol (with NetBIOS enabled over IPX/SPX)
- TCP/IP (must be selected during Server installation)

### Minimum/Recommended Hardware for Workstations/Single User

- **266 MHz Pentium-class processor** (500 MHz or higher recommended)
- **64 MB of RAM** (256 MB or higher recommended)
- **100 MB of free hard disk space.** Workstations that are used for database maintenance procedures should have three times the size of the largest CDS database as free hard disk space on the drive.
- Full access to the network server directory containing CDS program and data files.
- **Microsoft® Word 97**, or a later version, is required to use Word as the default word processor in CDS. Earlier versions of Word can be used independently of CDS on the same computer.
- **Microsoft® Outlook 2000 (Microsoft Office Outlook 2003 recommended) or Lotus Notes R6**, or a later version, is required to use E-mail Synchronization. Please note that the program does not support Microsoft® Outlook Express.
- **E-Z Mobile for Palm (E-Z Conduit is not supported by Client Data System v4.3).**

## Introduction

Welcome to Client Data System, Version 4.3! This service upgrade provides E-Z Data's latest innovations and solutions for users of CDS. To install this upgrade, please follow the instructions contained in this document. Please read this entire document carefully before beginning the upgrade to avoid any potential issues arising during the installation.

## Overview

During the upgrade, many of the program files will be replaced. The structures in all databases will be updated without affecting the data, including the DEMO database. The installation program now endeavors to protect the column descriptions, field help and window positions that have been customized. If some aspect of the system that was customized is returned to the default setting, it will need to be recreated after the installation. Also, any custom buttons that were created may have to be re-created after the upgrade.

E-Z Data strongly recommends backing up your database before running the upgrade and the installation program can perform this function for you. This backup will protect your data by creating a copy of all program files that will allow you to revert back to the previous version of CDS with everything intact should you experience an issue with the new version. When prompted, click the **Yes** button to allow the program to perform this procedure prior to the installation.

The installation process for Single User computers is simple and requires minimal time. The upgrade involves:

- Backing up all databases and the entire CDSWin directory
- Running the setup program to upgrade the CDS program files

Running the upgrade on Network installations is relatively quick and involves the following:

- Backing up all databases and the entire CDSWin directory
- Running the upgrade on each workstation. The first workstation upgrade will also upgrade the server, which takes extra time based on the size of your database. Please note that the upgrade **must NOT be run on a Server without a CDS workstation**. Installing the upgrade on a Server without a CDS Workstation will result in a new installation of CDS, not the upgrade. This can lead to numerous issues so please ensure that the installation is run on a system with a CDS Workstation.

Detailed procedures for running the upgrade on Single User computers and Network installations are in the respective sections that follow.

# Installing the CDS 4.x to 4.3 Upgrade on a Single User Computer

## Running the Upgrade

1. Close all programs that are running on the computer, including CDS and any open MobiLink connections.
2. Insert the CDS v4.3 CD into the CD-ROM drive.
3. If the InstallShield Wizard opens, skip ahead to Step 4. If not, continue as follows:
  - From the Taskbar, click the **Start** button and then click **Run** to open the Run dialog box.
  - Click the **Browse** button and then select the CD-ROM drive from the **Look in:** drop-down list in the Browse dialog box.
  - Double-click the **Setup.exe** file to return to the Run dialog box.
  - Click the **OK** button in the Run dialog box to open the InstallShield Wizard.
4. When prompted, click the **Yes** button to affirm that you have reviewed this guide and proceed to this next step in the installation.
5. The Start Copying Files window displays which type of installation will be performed. The Install Type should be: Standalone, the Current version should be listed correctly and the Upgraded version should be v4.3. If this is correct, click the **Next** button to continue.
6. When prompted, click the **Yes** button to allow the program to create a backup copy of your database and related files. E-Z Data strongly recommends allowing the program to perform this procedure to protect your data.
7. When the backup is complete, the program launches the EZ DBSync utility, which verifies the integrity of your database before completing the upgrade. Click the **Continue** button. The EZ DBSync window will occasionally show as “Not Responding” but this is no cause for concern. In that case, the installation program is just waiting for the Sybase application to complete a process.

**Note:** This step of the installation process varies in the time it takes depending on the size of your database. The process is tracked by a progress bar that will occasionally pause for a significant amount of time.
8. When the CDS installation is complete, you will be prompted to install CDS Outlook Synchronization. Click the **Yes** button to open the InstallShield Wizard.
9. Click the **Next** button to begin the CDS Microsoft Office Outlook Synchronization installation.
10. In the InstallShield Wizard Complete window, click the **Finish** button.
11. The InstallShield Wizard Complete window displays stating that “Your upgrade to Client Data System 4.3 is Complete.” Click the **Finish** button and then remove the CDS 4.3 Upgrade CD from the computer.

## After the Upgrade

Log in to each database to ensure that the program is functioning normally and that all of the various types of records are accessible.

If the CDS program does not appear to be functioning properly after running the CDS upgrade, contact E-Z Data Technical Support at (626) 585-3515 for assistance.

## Installing the CDS 4.x to 4.3 Upgrade on a Network

**NOTE:** Ensure that the server is running when the upgrade process is run. The upgrade **MUST BE RUN FROM A CDS WORKSTATION**. If the upgrade is run from a server without a CDS workstation, it will **NOT PERFORM THE UPGRADE PROPERLY**.

### Running the Upgrade

1. Close all programs that are running on the computer, including CDS and any open MobiLink connections.
2. Insert the CDS v4.3 CD into the CD-ROM drive.
3. If the InstallShield Wizard opens, skip ahead to Step 4. If not, continue as follows:
  - From the Taskbar, click the **Start** button and then click **Run** to open the Run dialog box.
  - Click the **Browse** button and then select the CD-ROM drive from the **Look in:** drop-down list in the Browse dialog box.
  - Double-click the **Setup.exe** file to return to the Run dialog box.
  - Click the **OK** button in the Run dialog box to open the InstallShield Wizard.
4. When the InstallShield Wizard opens, click the **Next** button to start the Setup program.
5. When prompted, click the **Yes** button to affirm that you have reviewed this guide and proceed to this next step in the installation.
6. From the Start Copying Files window, the program displays which the installation type. The Install Type should be: **SERVER**, the Current version should be listed correctly and the Upgraded version should be v4.3. If this is correct, click the **Next** button to continue.

**Note:** If the Install Type is not listed as: **SERVER**, you are not installing on a system with a CDS workstation. Cancel the installation and run it from a system with a CDS workstation.

7. When prompted, click the **Yes** button to allow the program to create a backup copy of your database and related files. E-Z Data strongly recommends allowing the program to perform this procedure to protect your data.
8. When the backup is complete, the program launches the EZ DBSync utility, which verifies the integrity of your database before completing the upgrade. Click the **Continue** button. The EZ DBSync window will occasionally show as “Not Responding” but this is no cause for concern. In that case, the installation program is just waiting for the Sybase application to complete a process.

**Note:** This step of the installation process varies in the time it takes depending on the size of your database. The process is tracked by a progress bar that will occasionally pause for a significant amount of time.

9. When the CDS installation is complete, you will be prompted to install CDS Microsoft Outlook Synchronization. Click the **Yes** button to start this installation.
10. From the Welcome step, click the **Next** button to begin the Outlook Synchronization installation.
11. When the installation of the Outlook Synchronization is complete, click the **Finish** button.
12. When the installation is complete, click the **Finish** button.

## Workstation Upgrades

The upgrade needs to be run on each workstation on the network. This portion of the upgrade is relatively quick and can be run from files on the server folder.

1. Close any Windows applications that are currently running, including any suite products. To open the Task List, press the **CTRL+ALT+DEL** keys. Select and then click the **End Task** button for each task except **Explorer** and **Systray**.
2. From the Taskbar, click the **Start** button and then select **Run**.
3. Click **Browse** to open the Browse dialog box. Select the network drive where CDS is installed from the drop-down menu in the Look in: dialog box.
4. Double-click the **CDSWin.svr** folder.
5. Double-click the **Wssetup** folder.
6. Double-click the **Setup** icon to close the Browse dialog box.
7. Click the **OK** button in the Run dialog box to start the CDS Setup program.
8. When the InstallShield Wizard opens, click the **Next** button to start the Setup program.
9. When prompted, click the **Yes** button to affirm that you have reviewed this guide and proceed to this next step in the installation.
10. From the Start Copying Files window, the program displays which type of installation will be performed. The Install Type should be: **WORKSTATION**, the Current version should be listed correctly and the Upgraded version should be v4.3. If this is correct, click the **Next** button to continue.  
**Note:** If the Install Type is not listed as: **WORKSTATION**, you are running the incorrect SETUP file. Cancel the installation and ensure that you run the SETUP file in the WSSETUP folder.
11. When the CDS installation is complete, you will be prompted to install CDS Microsoft Outlook Synchronization. Click the **Yes** button to start this installation.
12. From the Welcome step, click the **Next** button to begin the Outlook Synchronization installation.
13. When the installation of the Outlook Synchronization is complete, click the **Finish** button to continue.
14. When the installation is complete, click the **Finish** button.

## After the Upgrade

Log in to each database to ensure that the program is functioning normally and that all of the various types of records are accessible.

If the CDS program does not appear to be functioning properly after running the CDS upgrade, contact E-Z Data Technical Support at (626) 585-3515 for assistance.

## Appendix

### Configuring a Database Cache

By default, Sybase Adaptive Server Anywhere uses two megabytes of memory for caching. This default cache size is adequate for databases that are less than 20 MB in size. For very large databases, increasing the memory that is allocated to the server cache improves performance. Accessing database pages that have been cached in memory is much faster than reading the information directly from the server's hard disk. Allocating too much memory, however, will limit the available resources that other server-based programs may need to operate efficiently.

Generally, 10% of the total size of your database(s) is used to calculate the amount of memory to use for caching that will provide optimum performance. In the first example below, a 32-MB database and a 28-MB database produce a total database size of 60 MB. Using the general rule, 10% of the total database size, 6 MB of memory ( $60 \text{ MB} \times .10 = 6 \text{ MB}$ ) would be the optimum cache size.

The Sybase parameter *-c cache-size* is used to specify the amount of memory that will be used for caching. Among other methods, the cache size can be specified with *nM* (number of Megabytes) as in the following examples.

#### Example 1:

This is the typical Sybase Adaptive Server Anywhere startup command for a Windows 98 Server. The cache parameter in this example will allocate 6 Megabytes of memory for database caching.

```
\sqlanywhere7\win32\dsrv7.exe -n EZDATA -gd all -gp 4096 -c 6M
```

#### Example 2:

These are the typical Sybase Server parameters used to create a new service on a Windows 2000 Server. The cache parameter in this example will allocate 15 Megabytes of memory for database caching.

