ConcourseSuite 6.0

Installation, Setup, Maintenance, and Upgrade

concoursesuite

Introduction

Welcome to ConcourseSuite!

The installation, configuration, maintenance and upgrade of ConcourseSuite is intended to be as simple as possible. This document assumes that you have a working knowledge of the required applications. Please read the complete instructions for a successful installation and upgrade.

Implementing ConcourseSuite, like any enterprise-class software, is often a significant task for an organization. Implementation requires management participation, technical staff, and often the help of experienced ConcourseSuite consultants. Organizations implementing ConcourseSuite should read and review the ConcourseSuite Implementation Guide -- contact Concursive Corporation at http://www.concursive.com.

This information is provided to those that have read and agreed to the ConcourseSuite license agreement.

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Requirements

Pick your software requirements

ConcourseSuite works on a number of platforms. In CRM 6, PostgreSQL is the reference database and other databases are now community supported.

Operating System			
Linux	Mac OSX	Windows	Solaris

JVM
Java 6
Java 5

Database Server
PostgreSQL 8.x

Application Server
Apache Tomcat 6.0

Pick your hardware requirements

ConcourseSuite is lightweight. Any server you can buy today is generally more than you'll need. However, configure it based on the needs of your organization. If 100% uptime is required, a second spare server is recommended. If your organization plans to save lots of documents, increase the drive space. A single server can be used for the web server, database server, and mail server and expanded to additional servers later, when necessary. Dual processors or a dual-core processor is recommended because ConcourseSuite takes advantage of Java's multi-threaded operations.

New in CRM 6 is the optional Load-balancing and Clustering plug-in from Concursive. This plug-in distributes user load and workload across multiple servers.

Workload Estimating

Base memory required is 256MB

• Each additional user requires 1MB of memory

• Each Account and Contact record requires about 1K of memory

• Other factors will increase memory requirements

Base CPU required is 2 cores

Additional computing power may be required for:

- Increase in concurrent users

- Running reports

- Batch email processing

- Background workflows

Base storage required is 1GB

Additional storage space may be required for:

- Storing large or many documents

- Increase in records

Guidelines for a Single Server

1-25 Users
1 GHz (x2)
512 MB
18 GB
RAID

26-100
1.2 GHz (x2)
1 GB
36 GB
RAID

101-250
2 GHz (x2)
1 GB
36 GB
RAID

250 +
2.4 GHz (x4)
4 GB
72 GB
RAID

10,000
2.4 GHz (x8)
32 GB
1 TB
RAID

Upgrading from a Previous Version

> **ConcourseSuite 6.0 does not currently upgrade versions prior to 6.0. These instructions are for upgrading existing 6.0 versions with future stable releases.**

Please review all upgrade steps to ensure that the upgrade goes as planned. You will most likely want to avoid down time for your users and the upgrade process can be completed in under 10 minutes if you are prepared and everything goes well.

IMPORTANT: Make sure to backup the database and file library before continuing with the upgrade. The upgrade process will make irreversible changes to your database, which you can only get back by restoring a backup.

1. Backup the crm database – you can restore this database if a problem occurs during upgrade
2. Backup the file library, specified during application installation
3. Shutdown the Apache Tomcat web application server
4. Backup the existing Apache Tomcat webapps/crm.war file -- you can restore this WAR if a problem occurs during upgrade
5. Delete the existing Apache Tomcat webapps/crm directory
6. Delete the existing Apache Tomcat work/ directory – in case the application is cached
7. Copy the crm.war file into Tomcat's webapps folder, overwriting the existing crm.war file – replacing the existing file is important to automatically maintain settings
8. Startup the Apache Tomcat web application server
9. Review the Apache Tomcat logs/catalina.out or logs/stdout.txt files to watch the automated upgrade process

Once the application has started, and you are able to connect with a web browser, you might be prompted with a page indicating that the application has detected an out-of-date database. If so, this likely means that an upgrade issue occurred. Review the Apache Tomcat logs!

> **Make sure you have a backup!** If any problems occur during the upgrade, a detailed report is generated in the Apache Tomcat log file which can be used to further identify the problem.

Steps for a successful Linux Installation

Install Java and Tomcat

1. Download and install the Java 6 SDK from http://java.sun.com/javase/downloads/widget/jdk6.jsp ; gcc-java does not work and is bundled with some Linux distributions so this must be renamed or removed

2. Download and install Tomcat 6 stable "Core" from http://tomcat.apache.org/download-60.cgi ; Apache Tomcat is bundled with some Linux distributions and fails if it was compiled with gcc-java

3. Depending on the total memory of your system, typically set Tomcat's memory to half of the server by setting the following environment variable (directly in the startup.sh file):

    Java:

    ```
    export JAVA_OPTS="-Xms512m -Xmx512m -XX:PermSize=64m -XX:MaxPermSize=128m"
    ```

4. Enable headless graphics rending to enable graphs by setting the following environment variable (directly in the startup.sh file):

    ```
    export CATALINA_OPTS=-Djava.awt.headless=true
    ```

5. Download and copy the ConcourseSuite application (crm.war) from http://www.concursive.com/show/concoursesuite/documents into Tomcat's "webapps" directory

6. Setup a service to automatically have Tomcat start and stop during startup and shutdown, according to Tomcat's documentation; the user that starts Tomcat must have a valid home directory as this is where Java stores preferences. Also use JSVC for best performance.

Proceed to the section on Setting up a Database Server

Additional advanced steps to consider

1. Change Tomcat port to 80 in server.xml (either integrate with Apache Web Server or turn off Apache Web server if Tomcat will be using port 80)

2. Obtain and install an SSL certificate to run on port 443

Steps for a successful Mac OSX Installation

Install Tomcat (Java is already installed)

1. Download and install Tomcat 6 stable "Core" from
   http://tomcat.apache.org/download-60.cgi

2. Depending on the total memory of your system, typically set Tomcat's memory to half of the
   server by setting the following environment variable (in startup.sh):

   ```
   export JAVA_OPTS="-Xms512m -Xmx512m -XX:PermSize=64m -XX:MaxPermSize=128m"
   ```

3. Download and copy the ConcourseSuite application (crm.war) from
   http://www.concursive.com/show/concoursesuite/documents into Tomcat's "webapps"
   directory

4. Setup a service to automatically have Tomcat start and stop during startup and shutdown

Proceed to the section on Setting up a Database Server

Additional advanced steps to consider

1. Change Tomcat port to 80 in server.xml (either integrate with Apache Web Server or turn off
   Apache Web server if Tomcat will be using port 80)

2. Obtain and install an SSL certificate to run on port 443

Steps for a successful Windows Installation

Install Java and Tomcat

1. Download and install the Java 6.0 or later from http://www.java.com

2. Download and install Tomcat 6 stable "Core" – 32-bit/64-bit Windows Service Installer from http://tomcat.apache.org/download-60.cgi; depending on the total memory of your system, typically set Tomcat's memory to half of the server using Tomcat's configuration editor

3. Using the Windows Services Control Panel, stop the "Apache Tomcat" service

4. Download and copy the ConcourseSuite application (crm.war) from http://www.concursive.com/show/concoursesuite/documents into Tomcat's "webapps" directory – usually located in
C:\Program Files\Apache Software\Tomcat\webapps

Proceed to the section on Setting up a Database Server

Additional advanced steps to consider

1. Change Tomcat port to 80 in server.xml (either integrate with Windows IIS WWW Server or turn off Windows IIS WWW Server in the Windows Services Control Panel if Tomcat will be using port 80)

2. Obtain and install an SSL certificate to run on port 443

Setting up a Database Server

PostgreSQL on Linux

If you are using PostgreSQL on Linux, then perform the following additional steps on a Linux server:

1. Verify if PostgreSQL is installed with "psql --version"

2. If your installation does not already have PostgreSQL 8.x, then download and install PostgreSQL 8 from http://www.postgresql.org

3. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf, the default since 8.0

4. For added security you can create a "crm" user using the following command, or optionally use the default "postgres" user without a password:

   ```
   createuser --pwprompt crm
   ```

5. Create a "crm" database, as that user, using the following command:

   ```
   createdb -E UNICODE crm
   ```

PostgreSQL on other platforms

If you are using PostgreSQL on Mac or Windows, then perform the following additional steps:

1. Download and install PostgreSQL 8 pre-built binary from http://www.postgresql.org

2. During the installation, make sure to create a postgres database user named "crm" and remember the password used

3. Using the Application "PgAdmin III," which was installed with PostgreSQL, login to the database server and create a new database called "crm" with UNICODE setting

Configuring ConcourseSuite

First-Time Start-up

Now that the necessary software and servers are installed, proceed with setting up ConcourseSuite as follows:

1. Start the Apache Tomcat service

2. Log in to the ConcourseSuite setup process by using a browser and going to "http://127.0.0.1:8080/crm" (assuming the file installed was crm.war and you are connecting to the local host 127.0.0.1)

3. Follow the on-screen directions and provide the database information when prompted

First-Time Setup

Once ConcourseSuite is setup and you are able to login with administrator access, there are several items that should be configured before users generally begin to use the system in a production environment.

> Even though ConcourseSuite is preloaded with defaults for every module, integrating ConcourseSuite into your existing company's sales and support process means collaboration with Sales, Marketing, and other departments.

Configuration can be completed by accessing the Admin tab of the application, then choosing to configure modules, roles, and users.

Configure Lookup Lists

Lookup lists are the drop-down menu choices that appear when adding data in each module. Review each drop-down to understand its use. Values can be added, renamed, and removed at any time.

Configure Custom Folders and Fields

This editor allows you to create custom forms that can be attached to Contacts, Accounts, Employees, Opportunities and Tickets using arbitrary fields.

Configure Roles and Permissions

Preloaded roles that can be renamed and modified depending on the size and shape of your company. Roles allow you to quickly categorize users with access permissions. Review the existing roles and determine if that user group will need Access/View/Add/Edit/Delete permissions for the specified feature.

> After an upgrade be sure to modify user roles to include new features.

Add Users

Each user must be a contact in the system, typically listed in the Employees module. You can easily create a new employee when adding new users by choosing the [Create Contact] on the Add User page.

The current LDAP implementation only validates the user's password against LDAP; the user must still be entered into ConcourseSuite as a user. The change password feature will not work in ConcourseSuite for LDAP users.

Advanced Technical Topics

Database Backup and Restore

PostgreSQL

• pg_dump

• psql

Setting up a Standby Web Server

While a single server can have plenty of hardware redundancy and software backups, it's possible that a complete hardware or software failure can occur.

Be prepared by setting up a spare server that is ready to go in a moment's notice.

The spare server must meet the hardware and software requirements.

1. Install Java and Tomcat just the same as the primary server

2. If the database server is being setup on the spare, then install and migrate the crm database

3. Copy the ConcourseSuite crm.war file from the production server to the backup server into Tomcat's webapp directory

4. Copy the fileLibrary directory from the production server to the backup server

5. In the fileLibrary, review and tweak the build.properties file, if necessary, since some file paths and IPs are stored and referenced in this file

6. Start Tomcat

7. Navigate to the web application on the spare server and at the welcome page, choose to "Use ConcourseSuite from a backup"

8. At the next prompt, input the directory to the fileLibrary; ConcourseSuite will read the license and file and configure the application to use the previous preferences

9. You can test logging in, but do not add any new data from this instance because the production instance will not receive updates to its cache; the spare is now ready

Questions

For additional information, support, or training, visit http://www.concursive.com for details. You will also find product FAQs and announcements.

Known Issues

While ConcourseSuite is written in pure Java, it may not be compatible with other application servers yet. The following issues are known:

1. Websphere Standard Edition currently requires the setup to "turn on" webapp directory writing

2. JBoss should work if the .war is extracted first into a directory, then deployed; this is because some files are written into this directory

3. Weblogic has not been tested recently… it might work

4. gcc-java does not work; if your Linux distribution comes with gcc-java then it needs to be replaced with either Sun Java or IBM Java