

ConcourseSuite5.0

Installation, Setup, Maintenance and Upgrade



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Introduction

Welcome to Concourse Suite!

The installation, configuration, maintenance and upgrade of Concourse Suite is intended to be as simple as possible. However, 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 Concourse Suite, 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 Concourse Suite consultants. Organizations implementing Concourse Suite should read and review the Concourse Suite Implementation Guide—contact Concourse Corporation at <http://www.concursive.com> to use the services of a Concourse Suite Solution Provider.

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

Legal Notice

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Requirements

Pick your software requirements

Concourse Suite works on a number of platforms. This means that you can choose what works best for your organization. PostgreSQL is the developer reference database.

| Operating system | | | |
|------------------|---------|-------------------|-------------|
| Linux | Mac OSX | Microsoft Windows | Sun Solaris |

| JVM |
|---------------------|
| Sun or IBM Java 1.5 |
| Sun or IBM Java 1.6 |

| Database Server |
|--|
| Apache Derby 10.3.1 (Embedded / Included) |
| Daffodil 1.3 or 1.4_beta* |
| FireBird SQL 1.5, 2.1* |
| IBM DB2 Express 9.0, 9.5 |
| Ingres |
| Interbase* |
| Microsoft SQL Server 2005, 2005 Express, 2000, 2000 DE |
| MySQL 5.0 |
| Oracle 10G Express |
| PostgreSQL 8.0, 8.1, 8.2 |

| Application Server + Sun Java VM |
|--|
| Apache Tomcat 5.5 + Sun Java 5.0 JRE |
| Apache Geronimo 1.1 + Sun Java 1.5 |
| IBM Websphere CE + Bundled IBM Java |
| IBM Websphere 6.1.0.5 + Bundled IBM Java (Some Issues still) |

* Support for these databases has been dropped in the ConcourseSuite Enterprise Edition 5.0.5 and later

Pick your hardware requirements

Concourse Suite 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 Concourse Suite takes advantage of Java's multi-threaded operations.

Workload Estimating

Base memory required is 256MB

- Each additional user requires 1MB 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
- Generating a high quantity of reports or very large 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 number of records

Guidelines

| 1-25 Users | 26-100 | 101-250 | 250 + |
|--------------|--------------|--------------|--------------|
| 733 MHz (x2) | 1.2 GHz (x2) | 1.2 GHz (x2) | 2.4 GHz (x2) |
| 512 MB | 1 GB | 1 GB | 2 GB |
| 18 GB | 36 GB | 36 GB | 72 GB |
| RAID | RAID | RAID | RAID |

Upgrading from a Previous Version

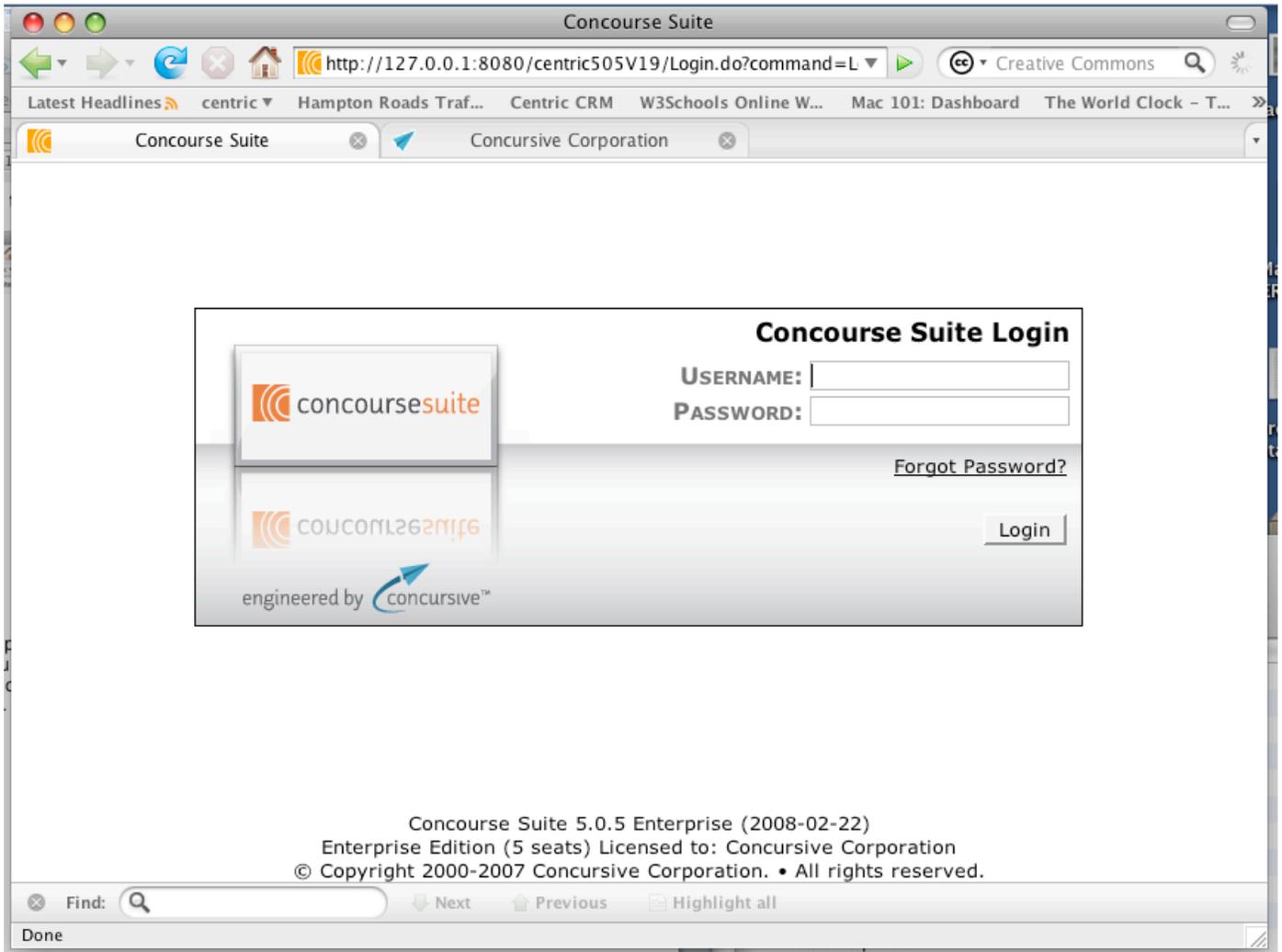
Currently using a prior version of Concourse Suite?

Upgrading from a previous version of Concourse Suite, or Centric CRM, has been designed to be as simple as possible. All of your previous configuration information is saved in the file library, which, by default, is not in the same path as the web application, so your information will be preserved.

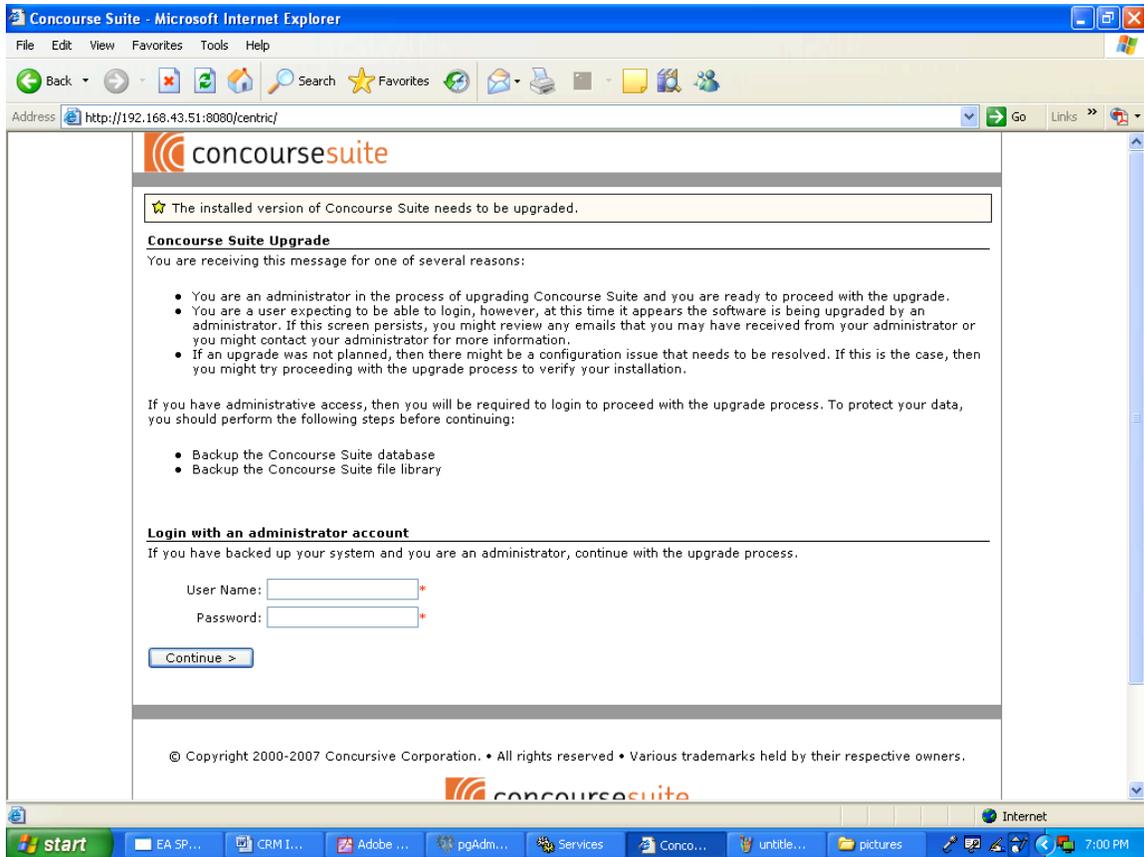
Please review all upgrade steps to ensure that the upgrade goes as planned. You will most likely want to avoid down-time for your users. The upgrade process can be completed in less than 10 minutes if you are prepared and everything goes well.

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 centric_crm database so you will be able 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/centric.war file so you can restore this WAR if a problem occurs during upgrade.
5. Delete the existing Apache Tomcat webapps/centric directory.
6. Delete the existing Apache Tomcat work/ directory.
7. Copy the centric.war file into Tomcat's webapps folder, overwriting the existing centric.war file. Replacing the existing file is important for preserving your existing settings during an upgrade.
8. Startup the Apache Tomcat web application server.
9. Login to ConcourseSuite to perform additional upgrade steps.



Once the application has started, and you are able to connect with a web browser, you will be prompted with a page indicating that the application has detected an out-of-date database. Follow the on-screen instructions to finalize the upgrade.



If you are not presented with an upgrade screen, it's possible that your browser has cached the login screen. Try refreshing or restarting your browser or emptying its cache.



Until an administrator logs in and confirms the upgrade, users will not be able to login.



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.

PostgreSQL 7.3/7.4 no longer supported. No problem.

We do our best to work with older versions of software, but we've moved on from PostgreSQL 7.3 and 7.4; PostgreSQL 8.0 and up add some important database maintenance capabilities that are required for upgrading table structures.

Before following these steps, make sure your outdated installation of PostgreSQL is not required for other applications in your organization. These steps are based on a Linux install since Windows users started at PostgreSQL 8.0 which already includes the required features.

1. Backup your current databases. You can use Postgres command:
"pg_dumpall > db_backup.sql"
2. Download and install PostgreSQL 8.2 from <http://www.postgresql.org>.
3. Start PostgreSQL, you should get a warning that your existing database is still in place. Move it and then restart PostgreSQL again to initialize an empty database.
4. Login as the "postgres" user and restore your database using "psql template1 -f db_backup.sql"
5. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf and that the web server IP has access to PostgreSQL, then restart postgresql
6. Continue with the ConcourseSuite upgrade.

Steps to Install Java and Tomcat on Linux OS

Install Java and Tomcat

1. Download and install the Java JRE or JDK 5.0 from <http://www.java.com>
gcc-java does not work and is bundled with some Linux distributions so this must be renamed or removed.
2. Download and install Tomcat 5.5 stable "Core" from <http://tomcat.apache.org/download-55.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):

Sun Java:

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

IBM Java:

```
export JAVA_OPTS="-Xms512m -Xmx512m"
```

4. Enable headless graphics rendering 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 (centric.war) from <http://www.concursive.com> into Tomcat's "webapps" directory
6. Setup a service to automatically have Tomcat start and stop during startup and shutdown in accordance with Tomcat's documentation. The user that starts Tomcat must have a home directory as this is where Java stores preferences.

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 OS X Installation

Install Tomcat (Java is already installed)

1. Download and install Tomcat 5.5 stable "Core" from <http://tomcat.apache.org/download-55.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"
```

3. Download and copy the ConcourseSuite binary (centric.war) file from <http://www.concursive.com> into Tomcat's "webapps" directory
4. Setup a service to automatically have Tomcat start and stop during startup and shutdown

Additional advanced steps to consider

1. Change Tomcat port to 80 in server.xml (either integrates 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 JRE 5.0 or later from <http://www.java.com>
2. Download and install Tomcat 5.5 stable “Core” - Windows Executable from <http://tomcat.apache.org/download-55.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. Open the Windows Services Control Panel and stop the “Apache Tomcat” service
4. Download and copy the ConcourseSuite binary (centric.war) file from <http://www.concursive.com> into Tomcat’s “webapps” directory—usually located in C:\Program Files\Apache Software\Tomcat\webapps

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

Apache Derby on any platform

Installation Steps for Derby on Windows:

1. Download Derby

Download the binary Apache Derby distribution from the Derby web site at http://db.apache.org/derby/derby_downloads.html. These tutorial instructions use version 10.1.2.1 and assume you downloaded one of the binary distribution files listed in the table below:

| Operating System | Download File |
|----------------------|------------------------------|
| Windows | db-derby-10.1.2.1-bin.zip |
| UNIX, Linux, and Mac | db-derby-10.1.2.1-bin.tar.gz |

If a more recent release is available, download that, then substitute that version number for 10.1.2.1 in the following instructions.

2. Install Derby

Choose the directory into which you want to install the Derby software. You must have write permissions to this directory. The sample instructions below use C:\Apache for Windows and /opt/Apache for UNIX; be sure to use your actual location. Copy the software distribution to the chosen location and then extract it as shown below:

Windows (use your extraction tool—these instructions show mks unzip):

```
mkdir C:\Apache  
  
copy db-derby-10.1.2.1-bin.zip C:\Apache  
  
cd C:\Apache  
  
unzip db-derby-10.1.2.1-bin.zip
```

3. Set DERBY_INSTALL

Set the DERBY_INSTALL variable to the location where you installed Derby. Examples are shown below, but be sure to use the actual location on your system:

Windows:

```
C:\> set DERBY_INSTALL=C:\Apache\db-derby-10.1.2.1-bin
```

4. Configure Embedded Derby

To use Derby in its embedded mode set your CLASSPATH to include the jar files listed below:

- **derby.jar**: contains the Derby engine and the Derby Embedded JDBC driver
- **derbytools.jar**: optional, provides the ij tool that is used by a couple sections in this tutorial

You can set your CLASSPATH explicitly with the command shown below:

Windows:

```
C:\> set CLASSPATH=%DERBY_INSTALL%\lib\derby.jar;%DERBY_INSTALL%\lib\derbytools.jar;
```

4. Change your local directory to:
DERBY_INSTALL/frameworks/embedded/bin

The setEmbeddedCP.bat (Windows) and setEmbeddedCP.ksh (UNIX) scripts use the DERBY_INSTALL variable to set the CLASSPATH for Derby embedded usage. You can edit the script itself to set DERBY_INSTALL, or you can let the script get DERBY_INSTALL from your environment. Since you already set DERBY_INSTALL in the “[Set DERBY_INSTALL](#)” section above, you don’t need to edit the script, so go ahead and execute it as shown below:

Windows:

```
C:\> cd %DERBY_INSTALL%\frameworks\embedded\bin
```

```
C:\Apache\db-derby-10.1.2.1-bin\frameworks\embedded\bin> setEmbeddedCP.bat
```

6. Verify Derby

Run the sysinfo command, as shown below, to output Derby system information:

```
java org.apache.derby.tools.sysinfo
```

Successful output will look something like this:

```
----- Java Information -----  
  
Java Version: 1.4.2_06  
  
Java Vendor: Sun Microsystems Inc.  
  
Java home: /opt/jdk1.4  
  
Java classpath: /opt/Apache/db-derby-10.1.2.1-  
bin/lib/derby.jar:/opt/Apache/db-derby-10.1.2.1-bin/lib/derbytools.jar:  
  
OS name: Linux
```

```

OS architecture: i386

OS version:    2.6.10-1.760_FC3

Java user name: jta

Java user home: /home/jta

Java user dir: /opt/Apache/db-derby-10.1.2.1-
bin/frameworks/embedded/bin

java.specification.name: Java Platform API Specification

java.specification.version: 1.4

----- Derby Information -----

JRE - JDBC: J2SE 1.4.2 - JDBC 3.0

[/opt/Apache/db-derby-10.1.2.1-bin/lib/derby.jar] 10.1.2.1 - (330608)

[/opt/Apache/db-derby-10.1.2.1-bin/lib/derbytools.jar] 10.1.2.1 - (330608)

----- Locale Information -----

```

Installation Steps for Derby on Linux:

1. Download Derby

Download the binary Apache Derby distribution from the Derby web site at http://db.apache.org/derby/derby_downloads.html. These tutorial instructions use version 10.1.2.1 and assume you downloaded one of the binary distribution files listed in the table below:

| Operating System | Download File |
|----------------------|------------------------------|
| Windows | db-derby-10.1.2.1-bin.zip |
| UNIX, Linux, and Mac | db-derby-10.1.2.1-bin.tar.gz |

If a more recent release is available, download that, then substitute that version number for 10.1.2.1 in the following instructions.

2. Install Derby

Choose the directory into which you want to install the Derby software. You must have write permissions to this directory. The sample instructions below use

C:\Apache for Windows and /opt/Apache for UNIX; be sure to use your actual location. Copy the software distribution to the location you choose, then extract it as shown below.

```
UNIX:

mkdir /opt/Apache

cp db-derby-10.1.2.1-bin.tar.gz /opt/Apache

cd /opt/Apache

tar xzvf db-derby-10.1.2.1-bin.tar.gz
```

3. Set DERBY_INSTALL

Set the DERBY_INSTALL variable to the location where you installed Derby. Examples are shown below, but be sure to use the actual location on your system:

```
UNIX Korn Shell:

$ export DERBY_INSTALL=/opt/Apache/db-derby-10.1.2.1-bin
```

4. Configure Embedded Derby

To use Derby in its embedded mode set your CLASSPATH to include the jar files listed below:

- **derby.jar**: contains the Derby engine and the Derby Embedded JDBC driver
- **derbytools.jar**: optional, provides the ij tool that is used by a couple sections in this tutorial

You can set your CLASSPATH explicitly with the command shown below:

```
UNIX:

$ export CLASSPATH=$DERBY_INSTALL/lib/derby.jar:$DERBY_INSTALL/lib/derbytools.jar:
```

5. Change your current directory to:
DERBY_INSTALL/frameworks/embedded/bin

The setEmbeddedCP.bat (Windows) and setEmbeddedCP.ksh (UNIX) scripts use the DERBY_INSTALL variable to set the CLASSPATH for Derby embedded usage. You can edit the script itself to set DERBY_INSTALL, or you can let the script get DERBY_INSTALL from

your environment. Since you already set DERBY_INSTALL in the “[Set DERBY_INSTALL](#)” section above, you don’t need to edit the script, so go ahead and execute it as shown below:

UNIX:

```
$ cd $DERBY_INSTALL/frameworks/embedded/bin
```

```
$ . setEmbeddedCP.ksh
```

6. Verify Derby

Run the sysinfo command, as shown below, to output Derby system information:

```
java org.apache.derby.tools.sysinfo
```

Successful output will look something like this:

```
----- Java Information -----  
  
Java Version: 1.4.2_06  
  
Java Vendor: Sun Microsystems Inc.  
  
Java home: /opt/jdk1.4  
  
Java classpath: /opt/Apache/db-derby-10.1.2.1-  
bin/lib/derby.jar:/opt/Apache/db-derby-10.1.2.1-bin/lib/derbytools.jar:  
  
OS name: Linux  
  
OS architecture: i386  
  
OS version: 2.6.10-1.760_FC3  
  
Java user name: jta  
  
Java user home: /home/jta  
  
Java user dir: /opt/Apache/db-derby-10.1.2.1-  
bin/frameworks/embedded/bin  
  
java.specification.name: Java Platform API Specification  
  
java.specification.version: 1.4
```

```
----- Derby Information -----  
  
JRE - JDBC: J2SE 1.4.2 - JDBC 3.0  
  
[/opt/Apache/db-derby-10.1.2.1-bin/lib/derby.jar] 10.1.2.1 - (330608)  
  
[/opt/Apache/db-derby-10.1.2.1-bin/lib/derbytools.jar] 10.1.2.1 - (330608)  
  
----- Locale Information -----
```

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 8.2, 8.1, or 8.0, then download and install PostgreSQL 8.2 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 “centric_crm” user using the following command, or optionally use the default “postgres” user without a password:

createuser—pwprompt centric_crm

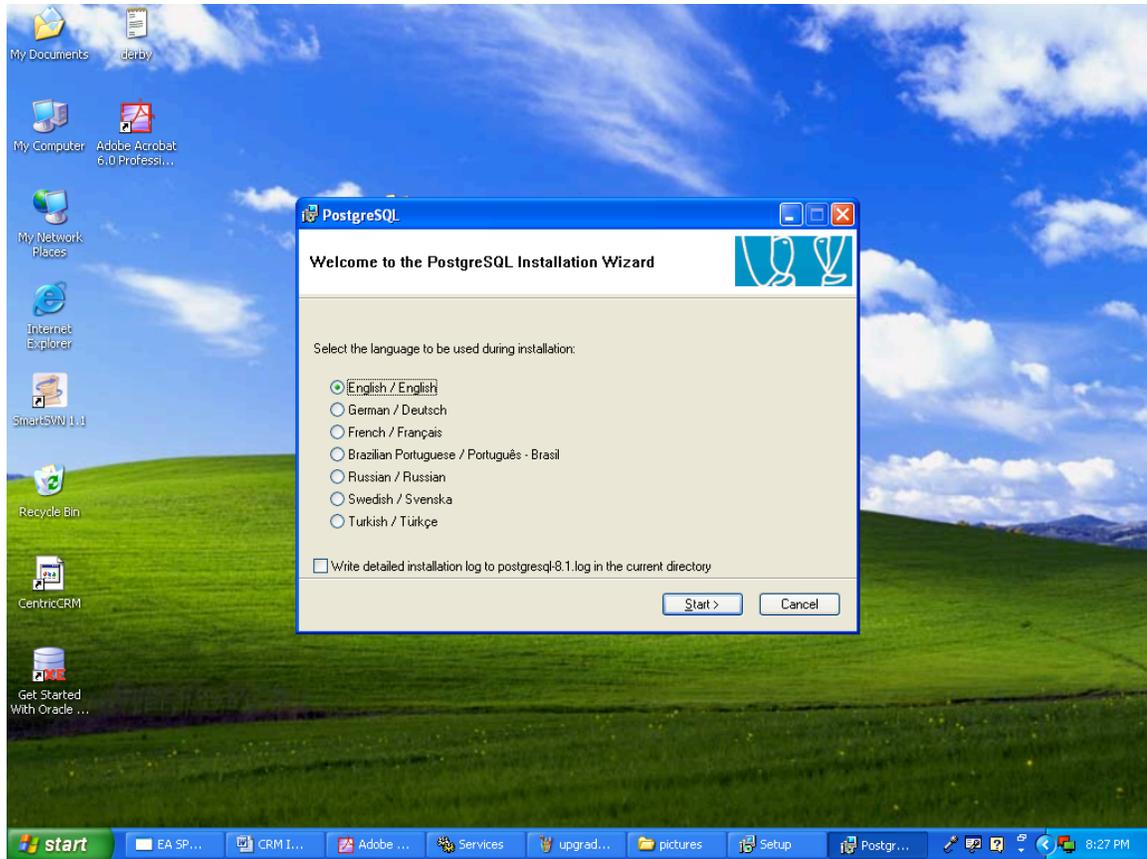
5. Create a “centric_crm” database, as that user, using the following command:

createdb -E UNICODE centric_crm

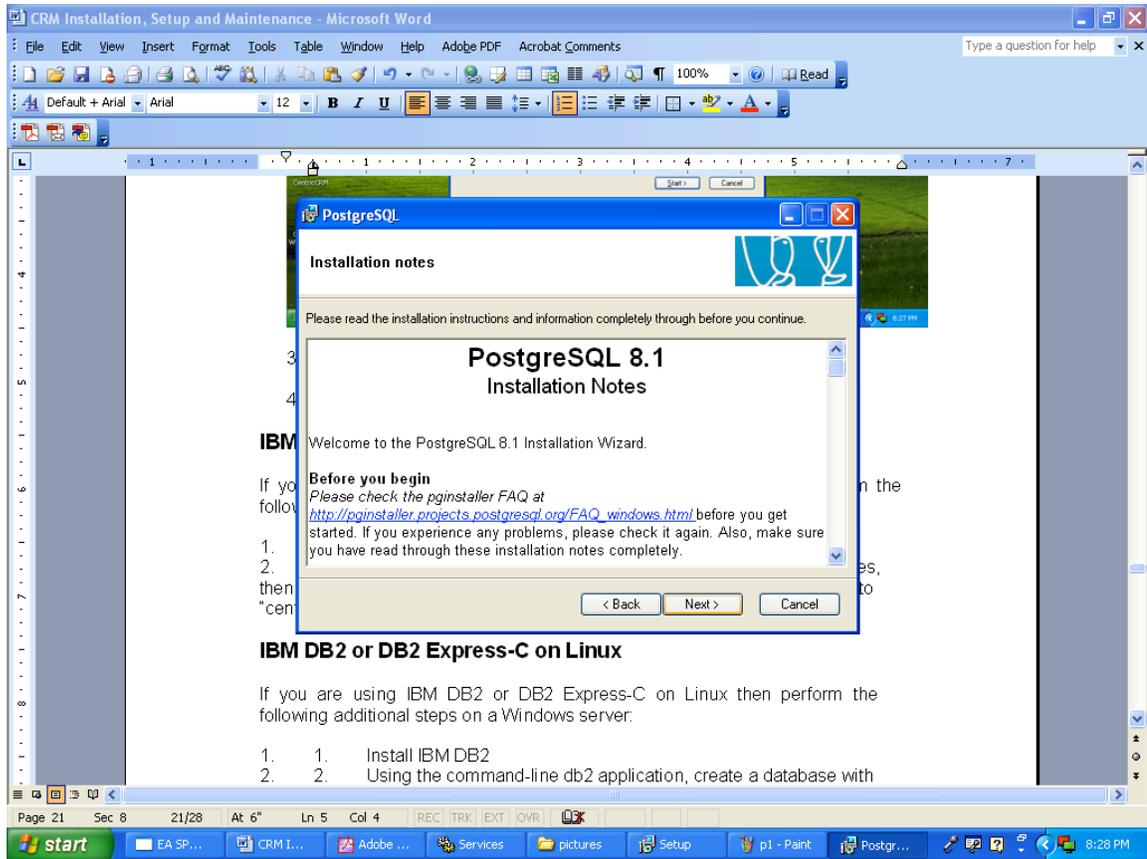
PostgreSQL on Windows

Installation Steps:

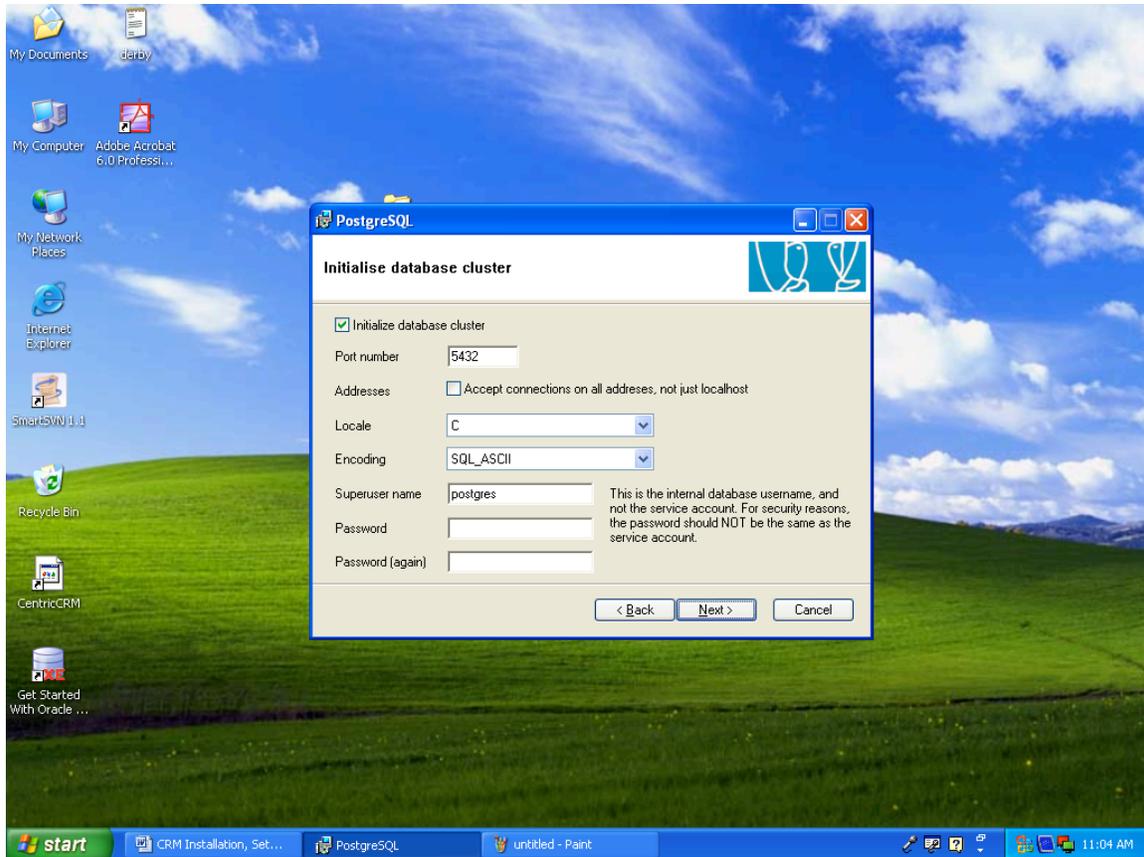
1. Download Postgres database from the site www.postgresql.org
2. Click on the Postgres executable. Click on Start as shown below:



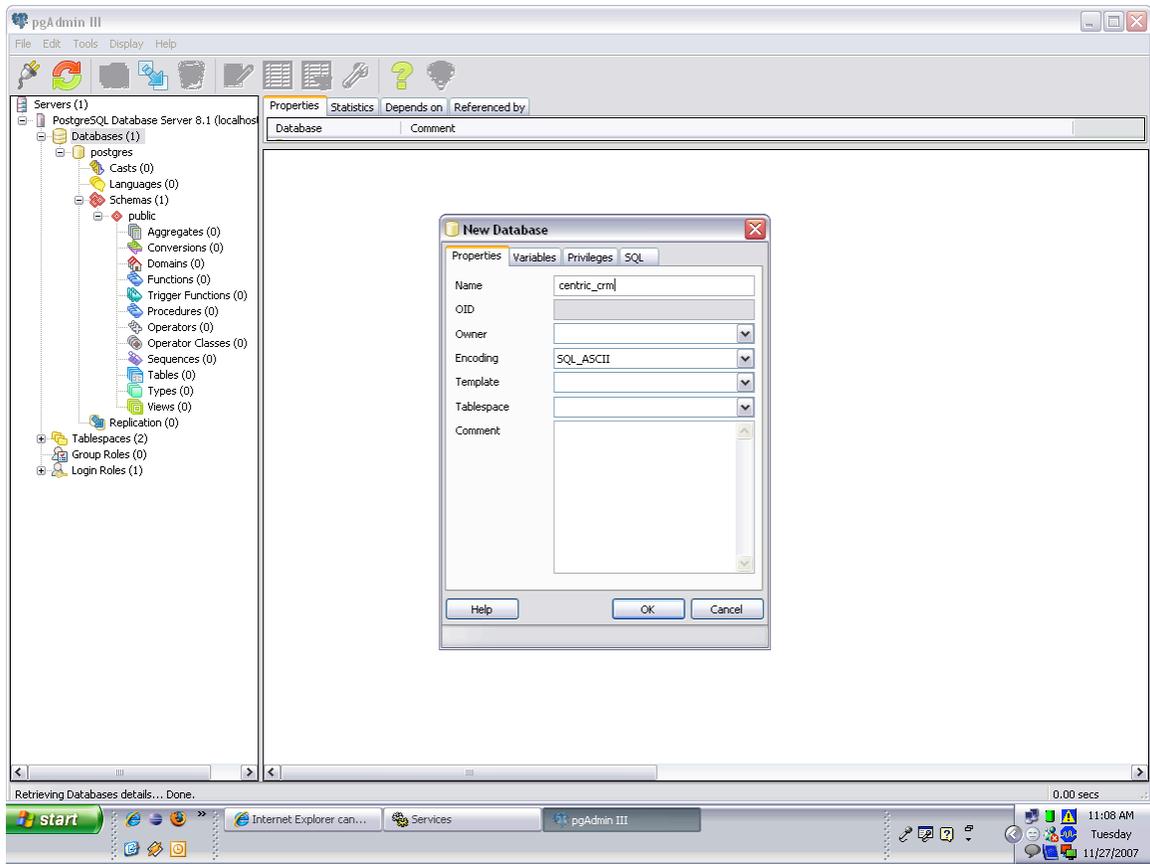
3. Click on Next.
4. Click on Next.



5. Click on Next.
6. Enter account password twice as shown below. The default is usually "Postgres".
7. Click on yes. Click on yes. Click on "OK".
8. Enter the Password twice as shown below:



9. Click on Next.
10. Click on Next. Click on Next.
11. Postgres will be installed successfully.
12. Using PGAdmin tool, which comes with Postgres, create an empty database "centric_crm" as shown below:



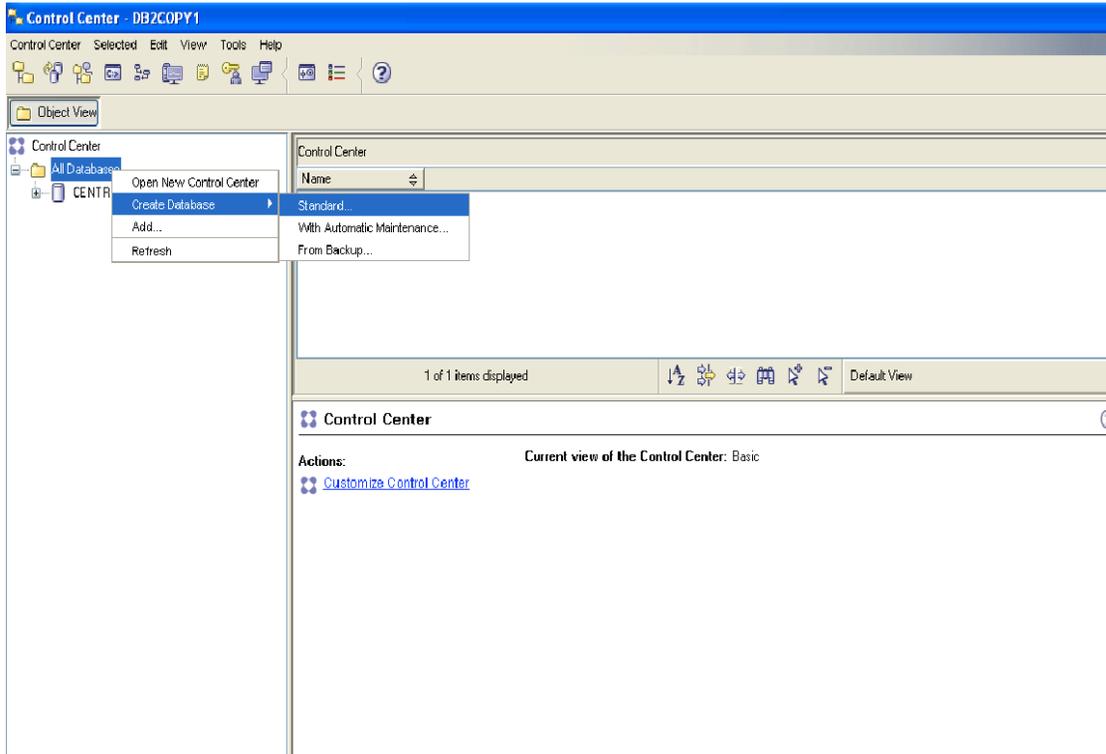
IBM DB2 or DB2 Express-C on Windows

Installation Steps:

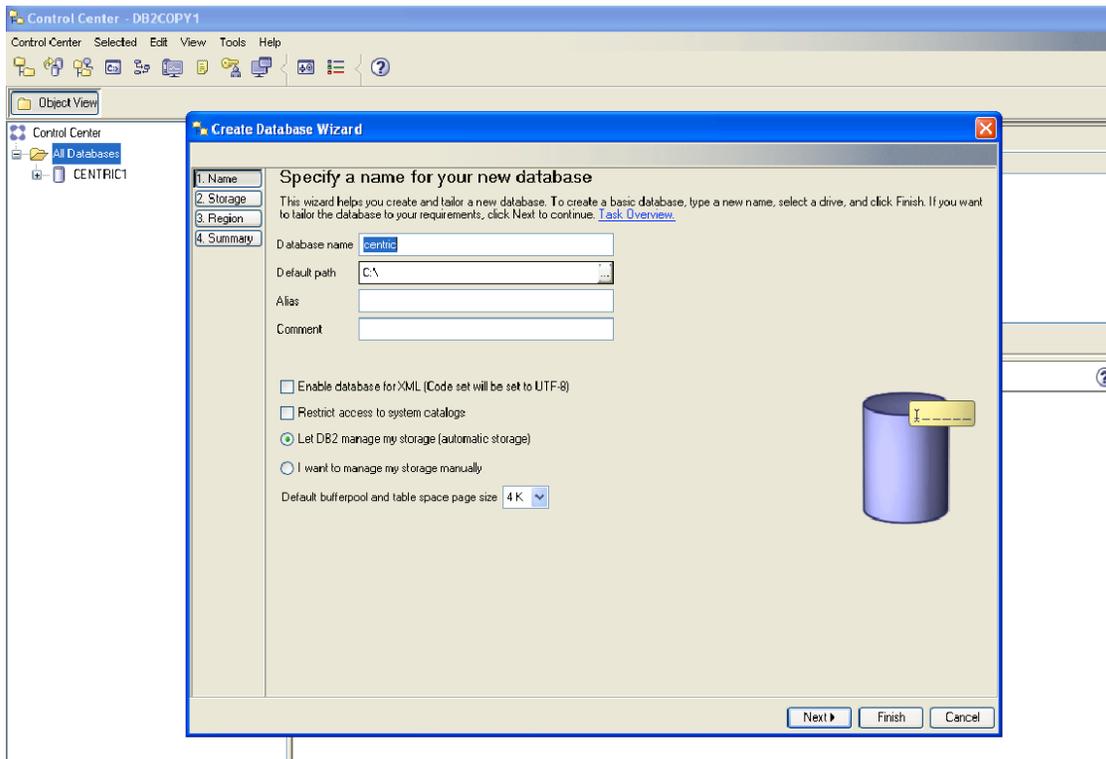
NOTE: Upgrading a system using a DB2 database to ConcourseSuite 5.0 or above should have a minimum of two megabytes of physical ram installed. If not, there is a high probability that the upgrade will fail.

1. Install IBM DB2
2. Using the DB2 Control Center application, choose All Databases, then Create Database with Automatic Maintenance; set the database name to “centric”, choose UTF-8 as the code set, and 32k for pagesize.
3. Follow the screen shots to create database.

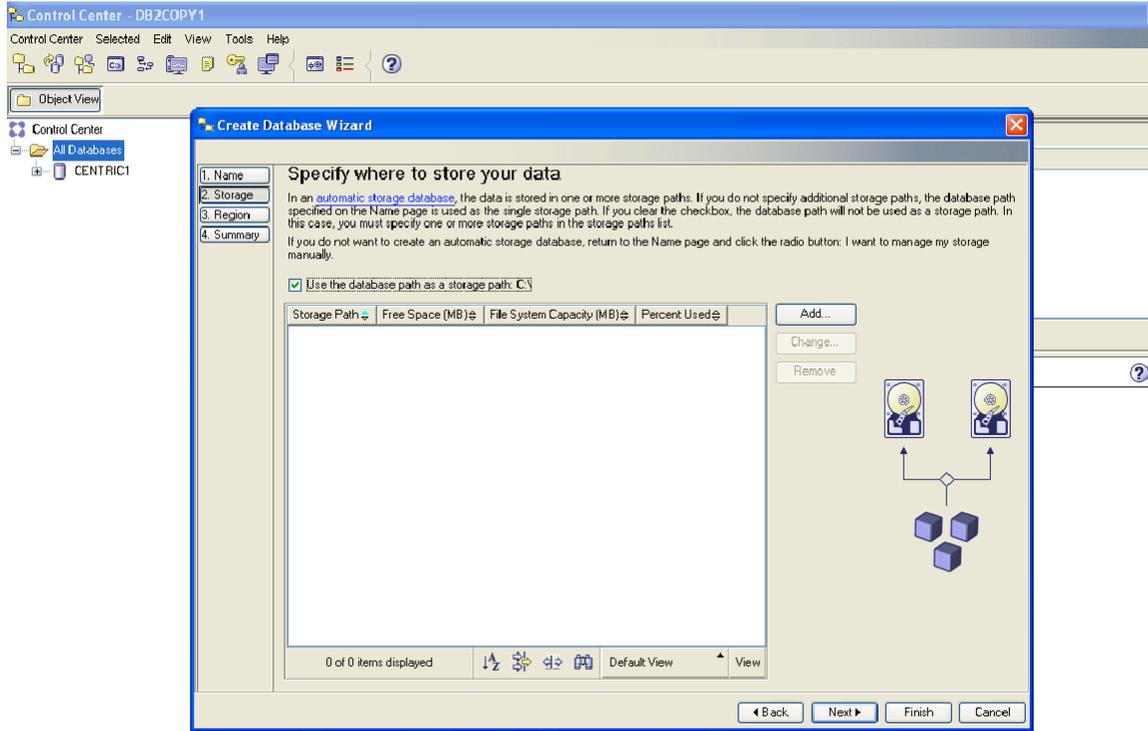
Screen 1:



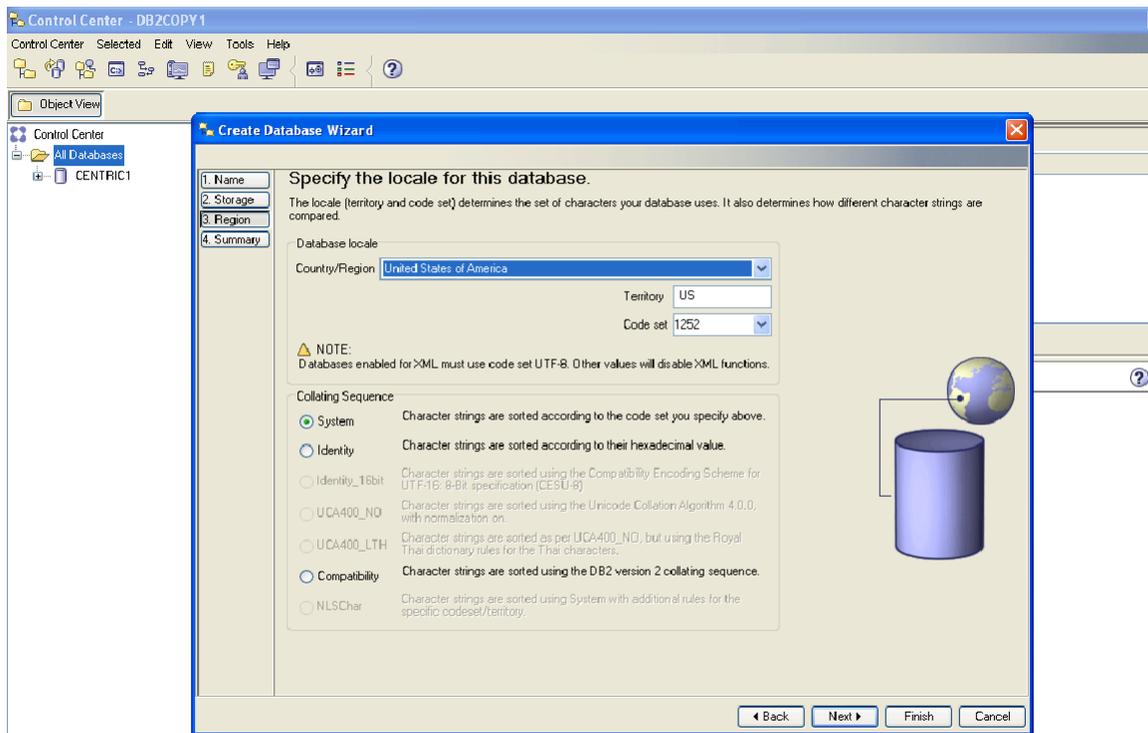
Screen 2:



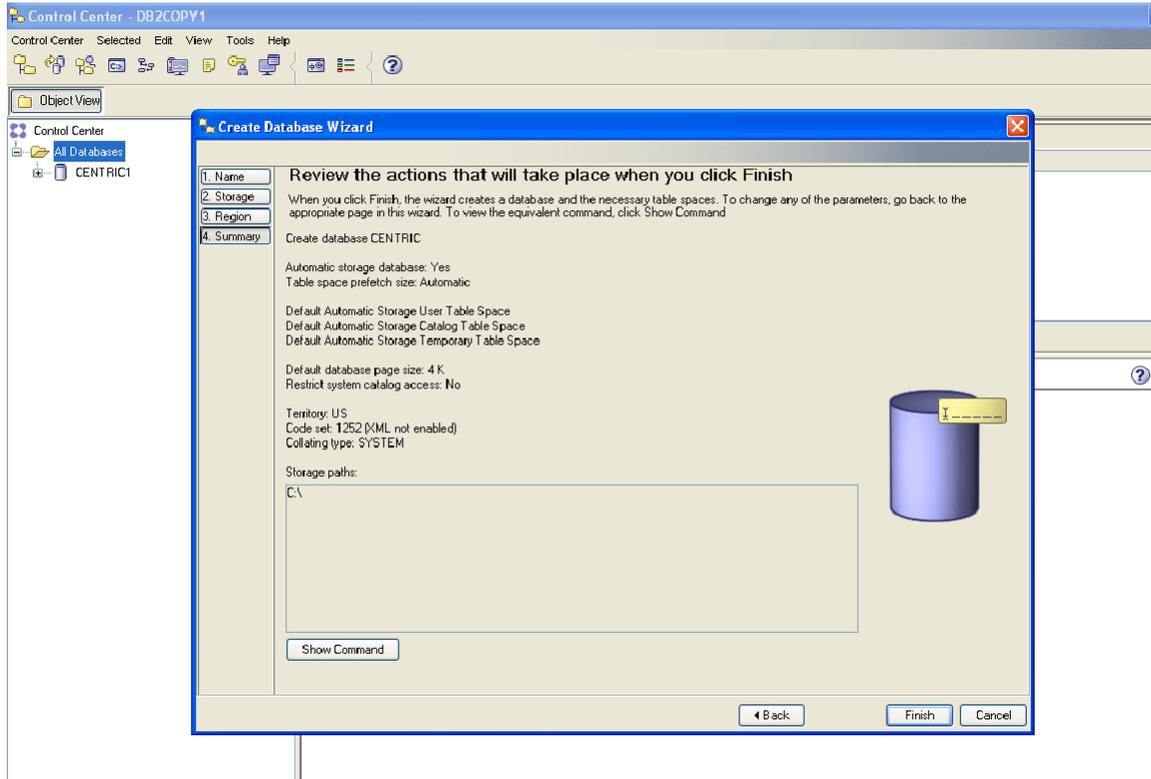
Screen 3:



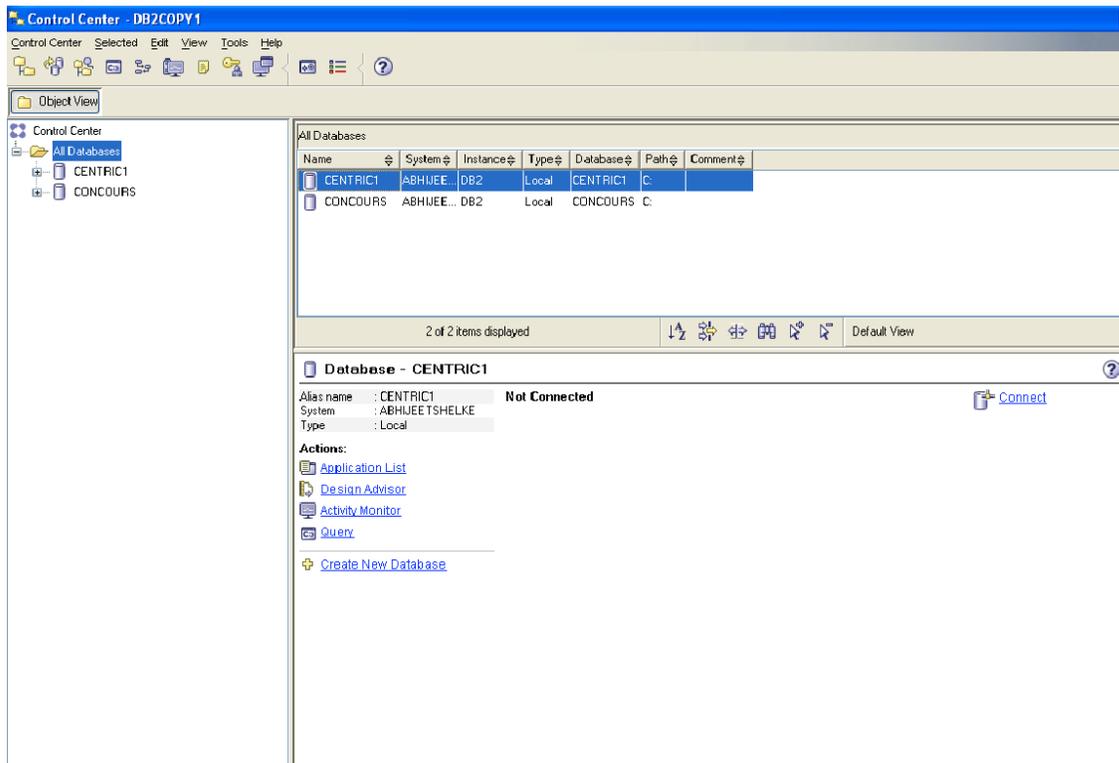
Screen 4:



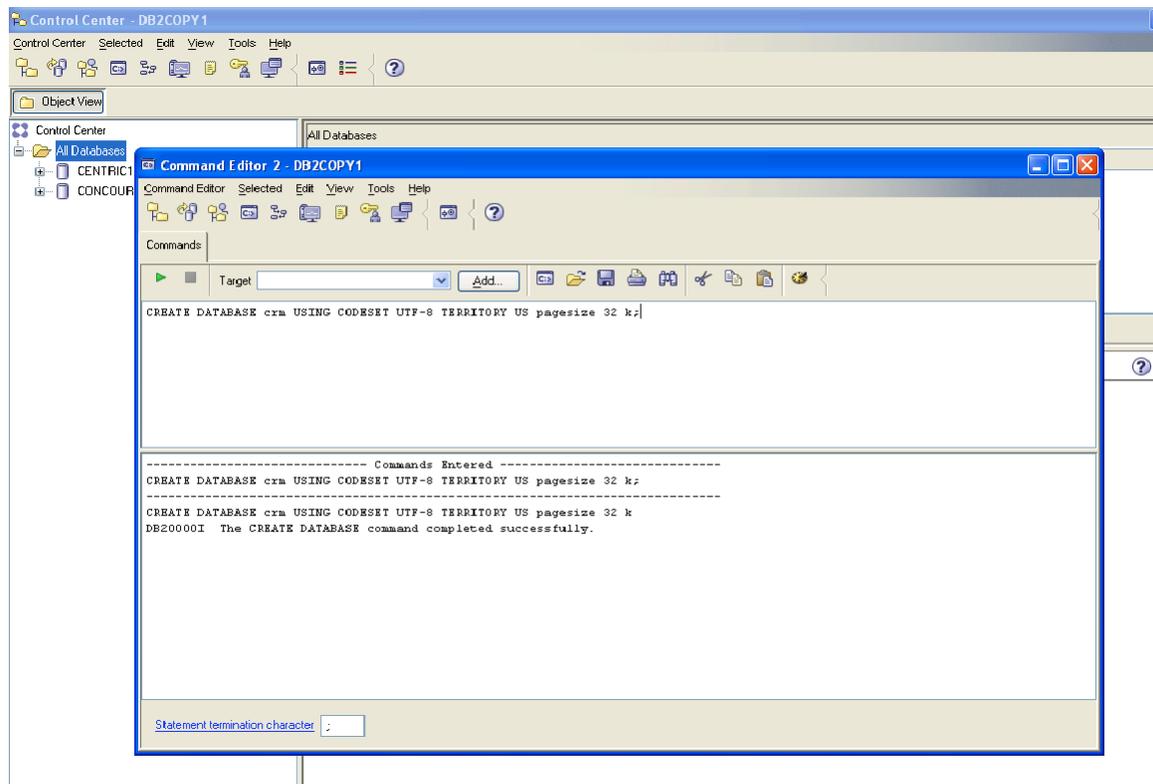
Screen 5:



Screen 6:



DB2 database creation using Query:



IBM DB2 or DB2 Express-C on Linux

Installation steps:

NOTE: Upgrading a system using a DB2 database to ConcourseSuite 5.0 should have a minimum of two megabytes of physical ram installed. If not, there is a high probability that the upgrade will fail.

1. Install IBM DB2
2. Using the command-line db2 application, create a database with the following SQL command:

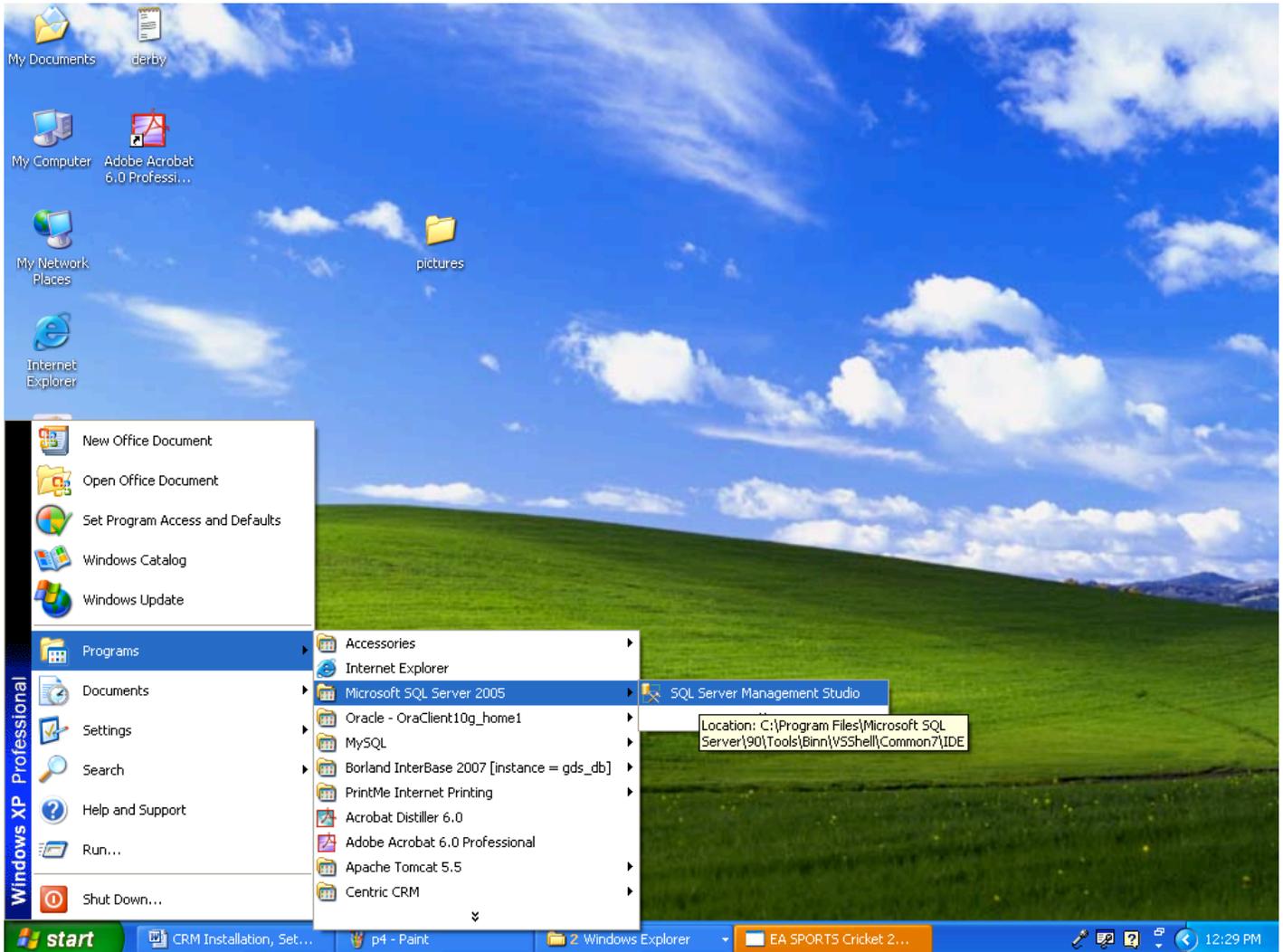
```
CREATE DATABASE centric USING CODESET UTF-8 TERRITORY US pagesize 32 k
```

3. Verify the port that DB2 is using by looking at the DB2 logs; the port is typically 50000 but the install process may choose 50001 or another port automatically

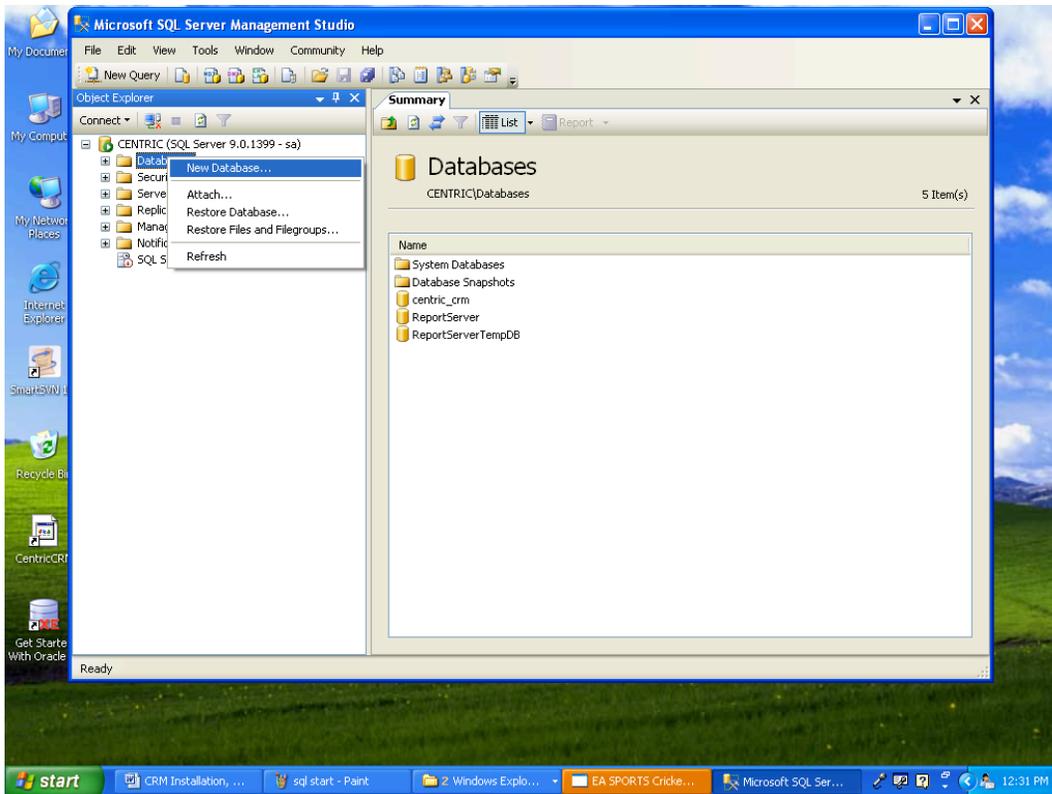
Microsoft SQL Server 2005 or 2005 Express

Installation steps:

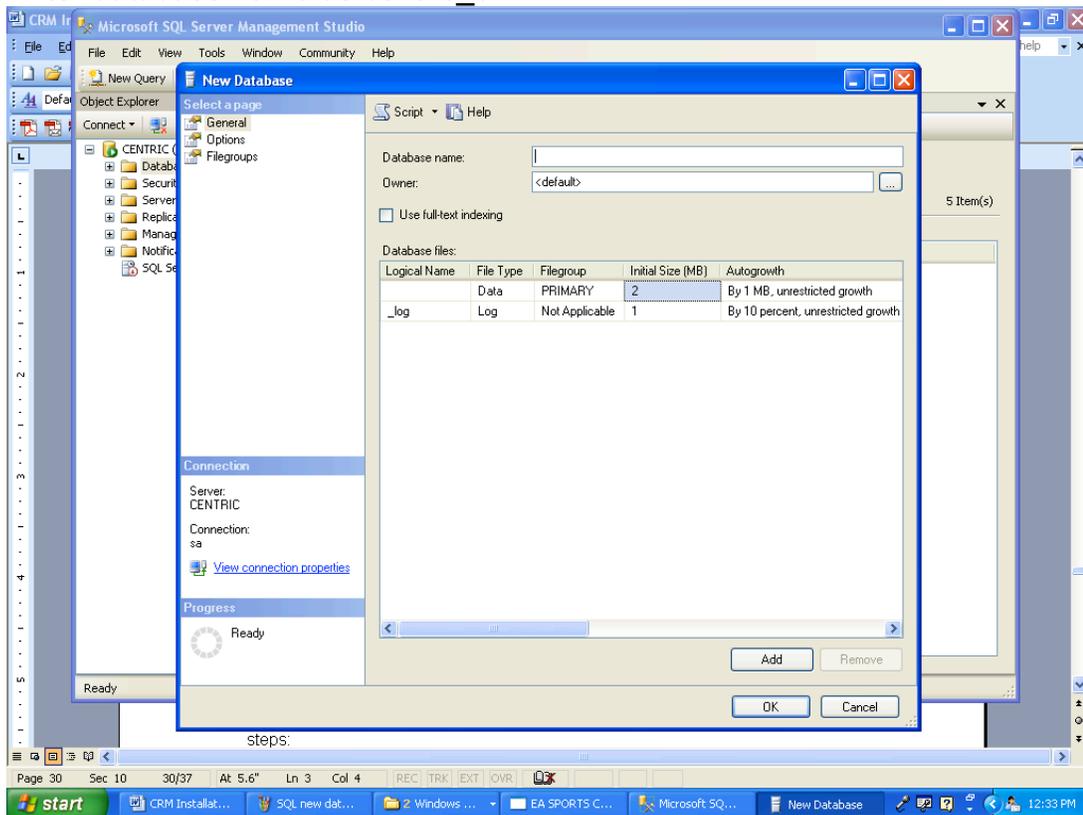
1. Install Microsoft SQL server 2005
2. From start ->Programs -> Microsoft SQL server 2005 -> click SQL server management studio



3. Select SQL authentication
4. Enter username and Password and click on connect
5. Right click on Databases and click on New database



6. Enter database name as centric_crm.

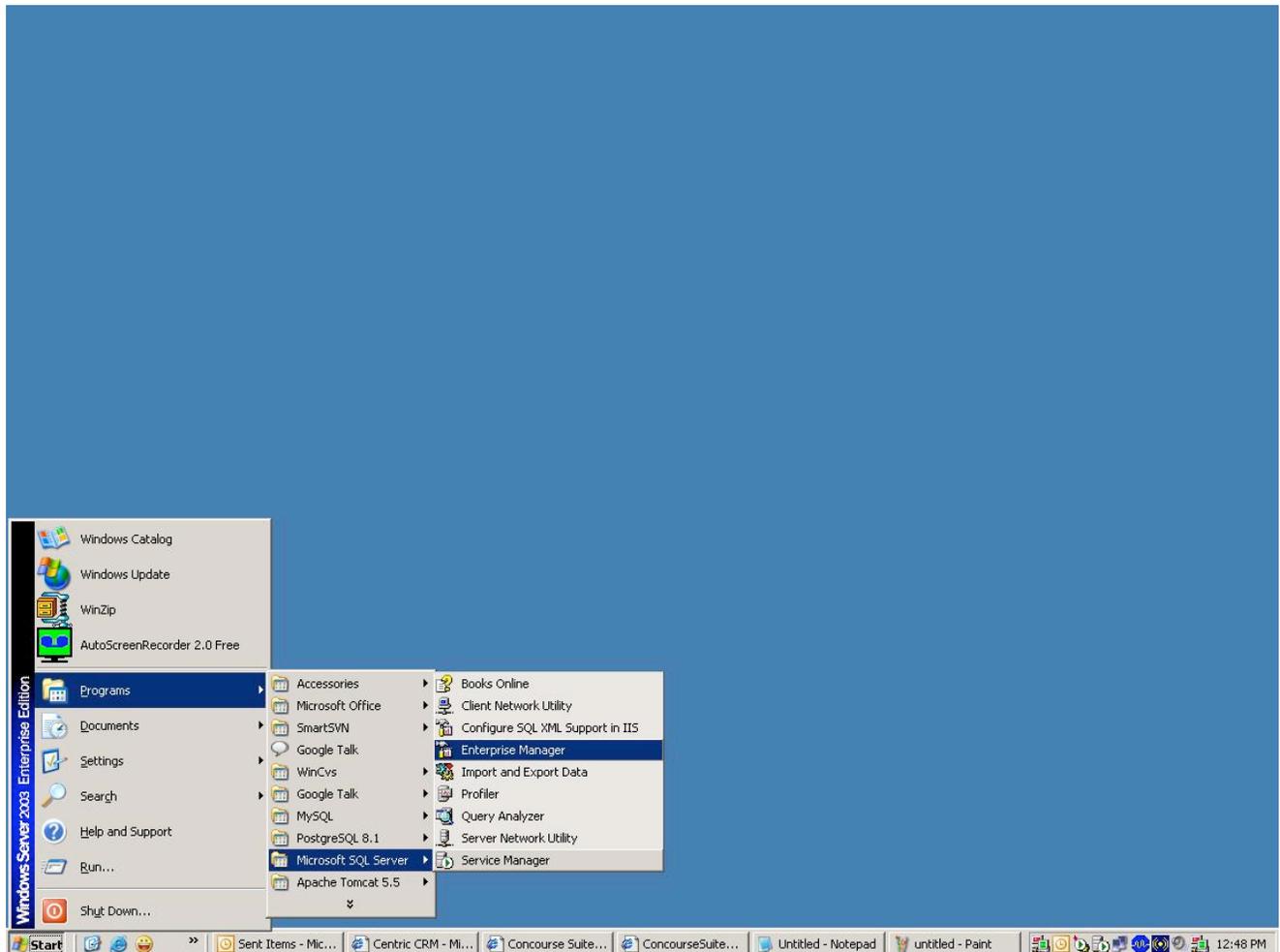


7. Click "OK".

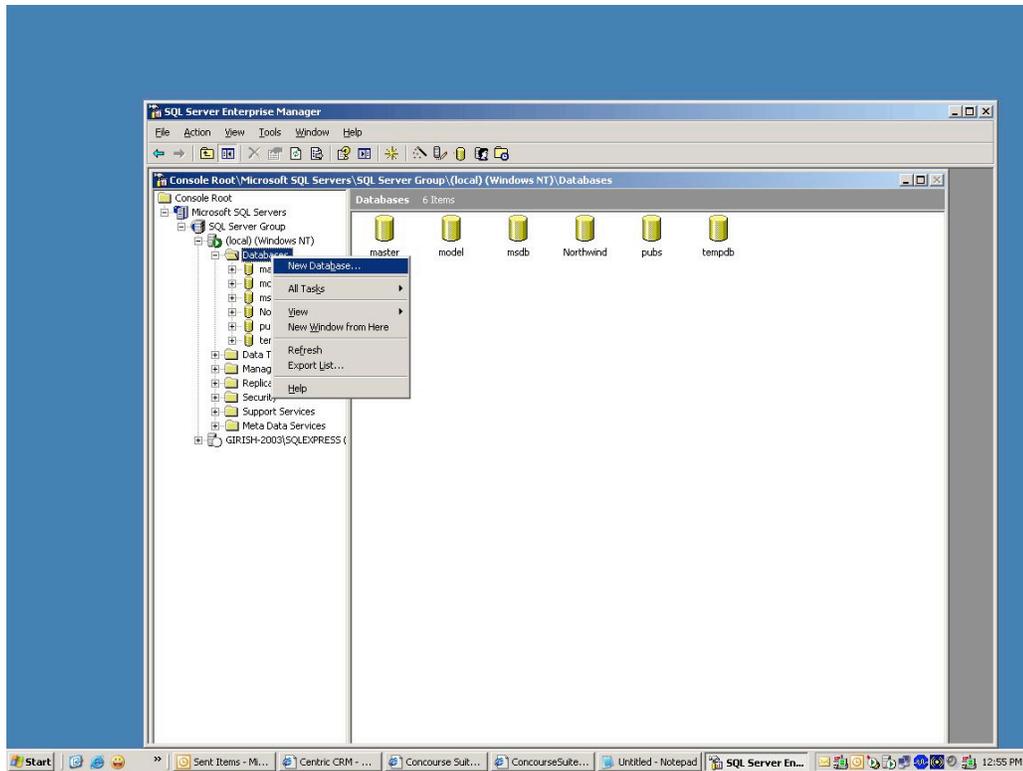
Microsoft SQL Server 2000

Installation Steps:

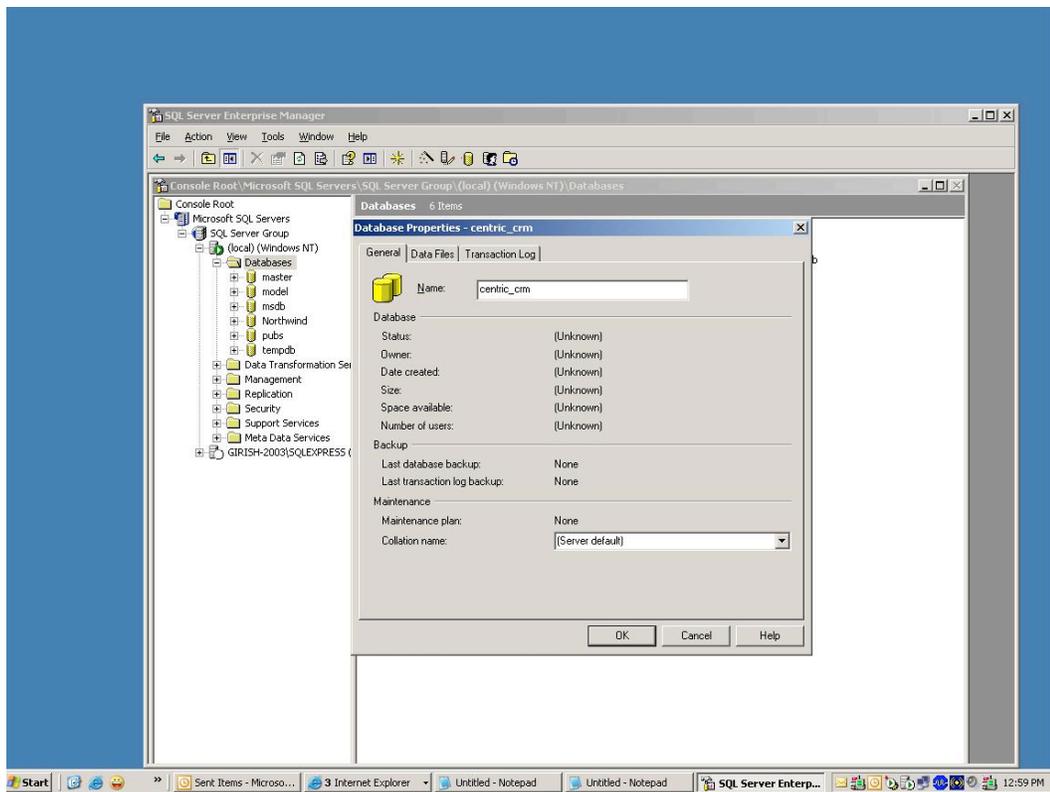
1. Install Microsoft SQL server 2000
2. From start ->Programs -> Microsoft SQL server 2000, select the SQL server management studio “Enterprise Manager”



3. Select SQL authentication
4. Enter username and Password and click on connect
5. Right click on Databases
6. Click on New database



7. Enter “centric_crm” as the database name and click “OK”.



Microsoft SQL Server DE (MSDE)

Installation Steps:

1. Install MSDE, make sure TCP/IP connections are enabled in setup.ini with the following entries:

```
DISABLENETWORKPROTOCOLS=0  
SECURITYMODE=SQL
```

2. Using osql.exe, create a user named “centric_crm” and remember the password used:

```
EXEC sp_addlogin 'centric_crm', 'centric_crm', 'master', 'us_english'  
GO
```

3. Using osql.exe, create a database called “centric_crm”:

```
CREATE DATABASE centric_crm  
GO
```

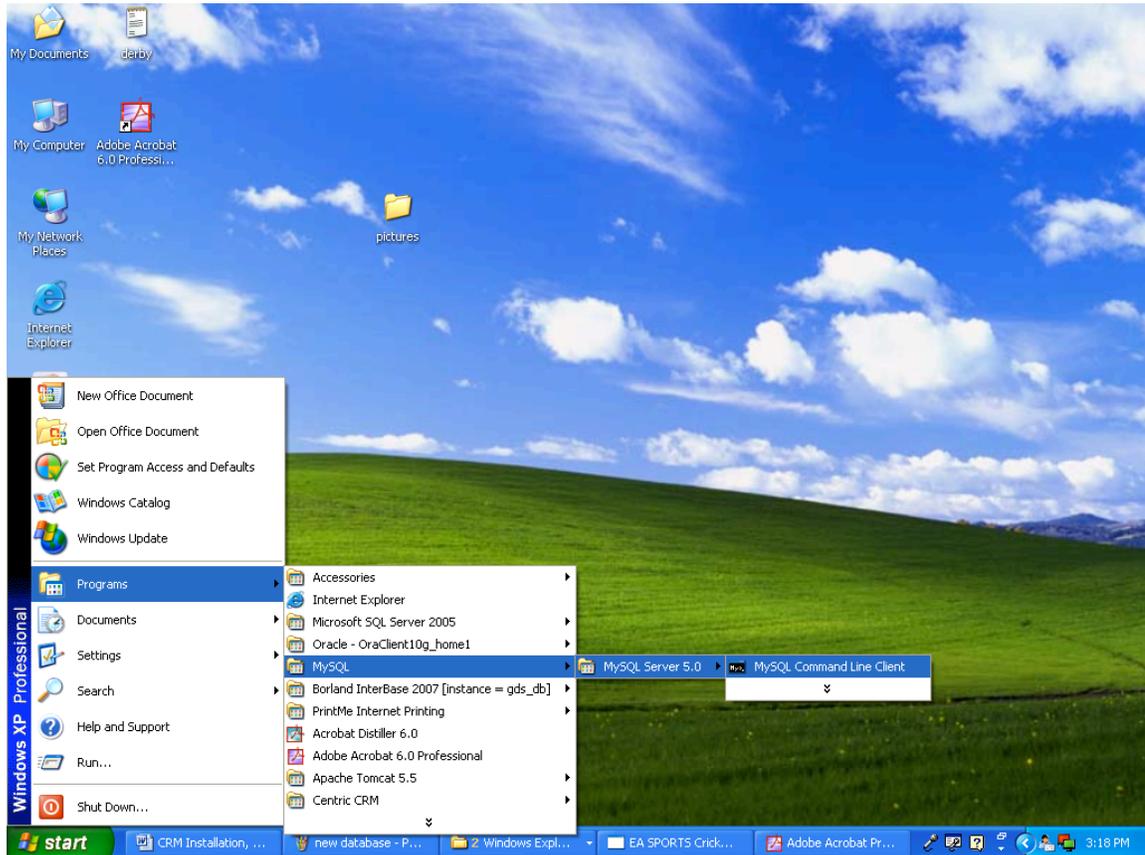
4. Under the database “centric_crm” add the user “centric_crm” with “dbo” permissions:

```
USE centric_crm  
GO  
EXEC sp_grantdbaccess 'centric_crm', 'centric_crm'  
GO  
EXEC sp_addrolemember 'db_owner', 'centric_crm'  
GO
```

MySQL 5.0

Installation Steps:

1. Install MYSQL server 5.0
2. From start -> Click Programs -> MYSQL -> Mysql server -> Mysql command line client

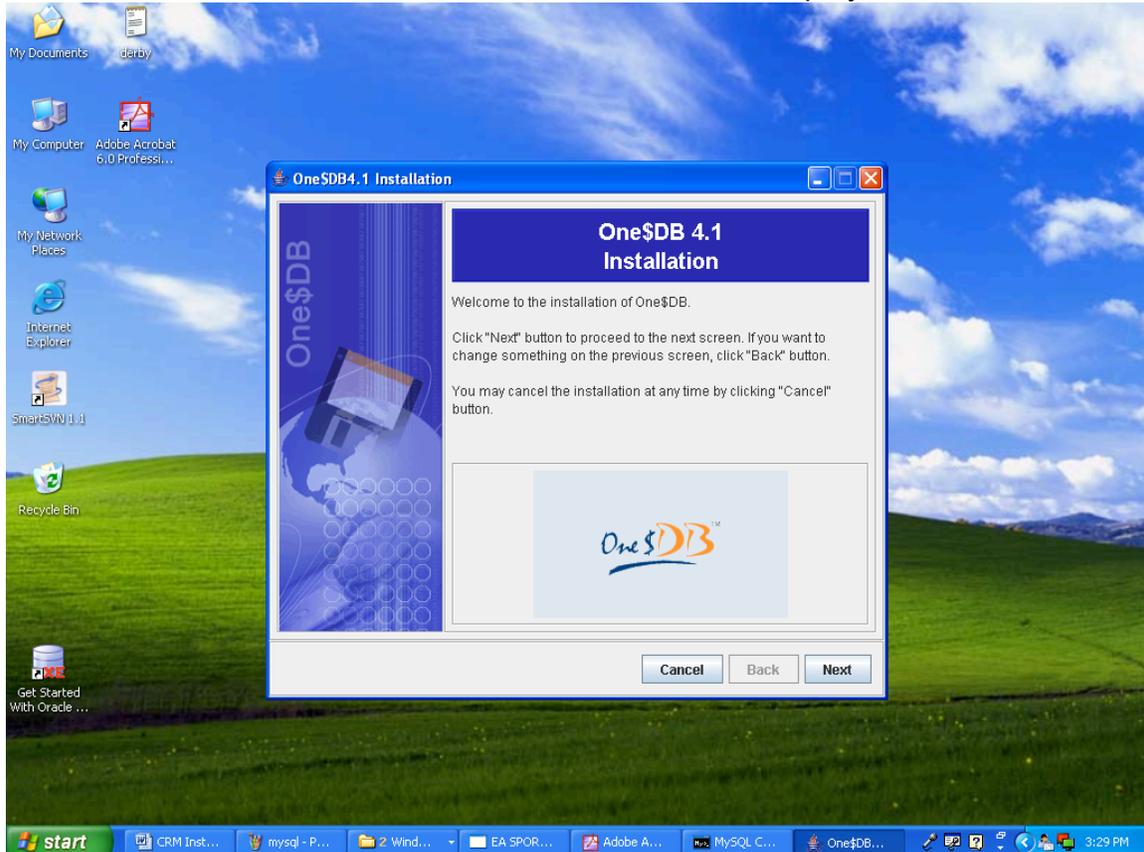


3. Type the below command to create database:
`CREATE DATABASE centric_crm CHARACTER SET utf8 COLLATE utf8_general_ci`

Daffodil DB

Installation Steps:

1. Download Daffodil DB or One Dollar DB4.0 or 4.1_beta.
2. Click on One Dollar DB4.0 or 4.1_beta.
3. Welcome screen to start the installation will be displayed.



4. Click on Next. Select yes. Click on next. Click on Next until the installation is completed.
5. DaffodilDB installation is completed.
6. Please note in DaffodilDB, empty database creation is not required as ConcourseSuite will create the database as part of the product's installation.

The Daffodil database must be properly configured for the installation/upgrade to succeed from source code. In the examples below we are using branch50daff as the application name. Substitute the name you are using for your instance of ConcourseSuite where necessary.

The build.properties file should contain the following configuration parameters:

```
## DAFFODIL DB EMBEDDED
```

```
GATEKEEPER.DBTYPE=daffodildb
```

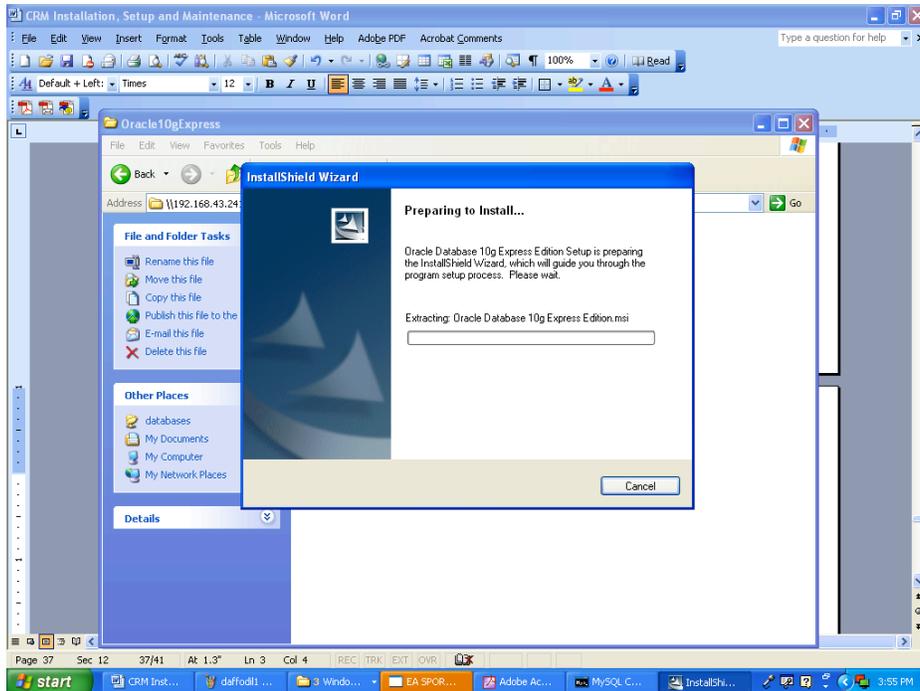
```

GATEKEEPER.DRIVER=in.co.daffodil.db.jdbc.DaffodilDBDriver
## YOU MUST EDIT THE path in the following line to where you want the
database
## created.
## The user and password must be set to daffodil
GATEKEEPER.URL=jdbc:daffodilDB_embedded:branch50daff;create=true;path=
C:/entricCRM/fileLibrary/branch50daff/daffodildb
GATEKEEPER.USER=DAFFODIL
GATEKEEPER.PASSWORD=daffodil
SITE.DBTYPE=daffodildb
SITE.DRIVER=in.co.daffodil.db.jdbc.DaffodilDBDriver
SITE.URL=jdbc:daffodilDB_embedded:
## YOU MUST EDIT THE path in the following line to where you want the database
## created.
## Ex. Use the same path as Centric CRM's deployed file library, then the name of
## the database, then end in daffodildb
## The user and password must be set to daffodil
SITE.APPEND=;create=true;path=C:/CentricCRM/fileLibrary/branch50daff/
SITE.USER=DAFFODIL
SITE.PASSWORD=daffodil
Please make sure that you install DB under fileLibrary as Main application use
fileLibrary path for access to DB:
GATEKEEPER.URL=jdbc:daffodilDB_embedded:branch50daff;create=true;path=
C:/CentricCRM/fileLibrary/branch50daff/daffodildb
C:/CentricCRM/fileLibrary/ - path to your fileLibrary
branch50daff - by default your application name
daffodildb - name of DB which must use during DB configuration in the installer
GATEKEEPER.USER=DAFFODIL - db user name
GATEKEEPER.PASSWORD=daffodil - db user password
SITE.APPEND=;create=true;path=C:/CentricCRM/fileLibrary/branch50daff/
SITE.USER=DAFFODIL
SITE.PASSWORD=daffodil
The same properties as above without the database name in the SITE.APPEND

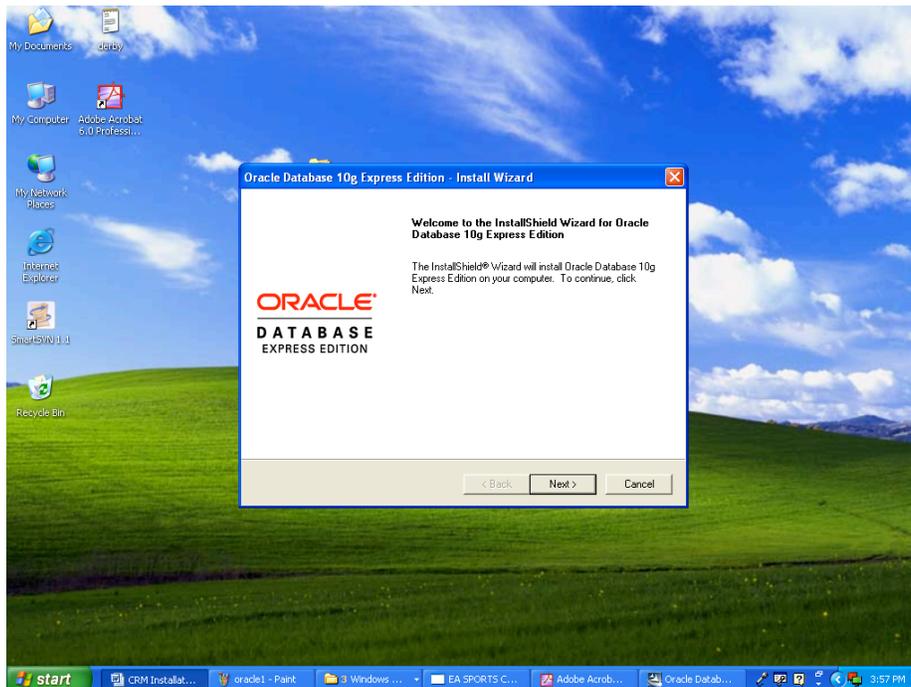
```

Oracle 10G Express Installation Steps:

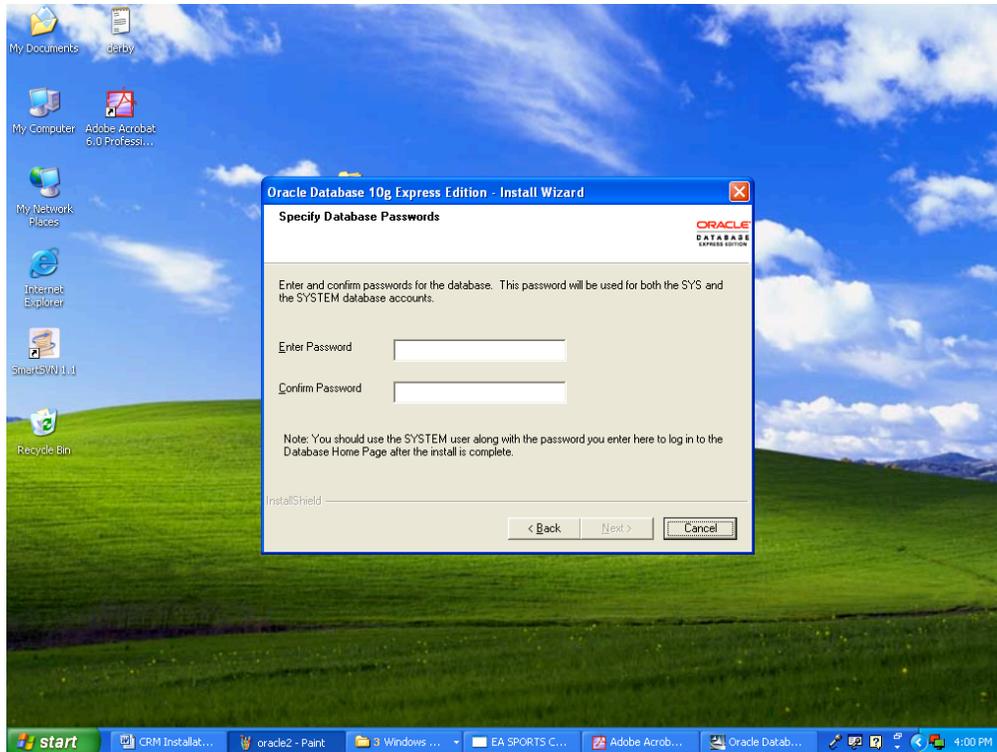
1. Click on the Oracle 10G express install file.



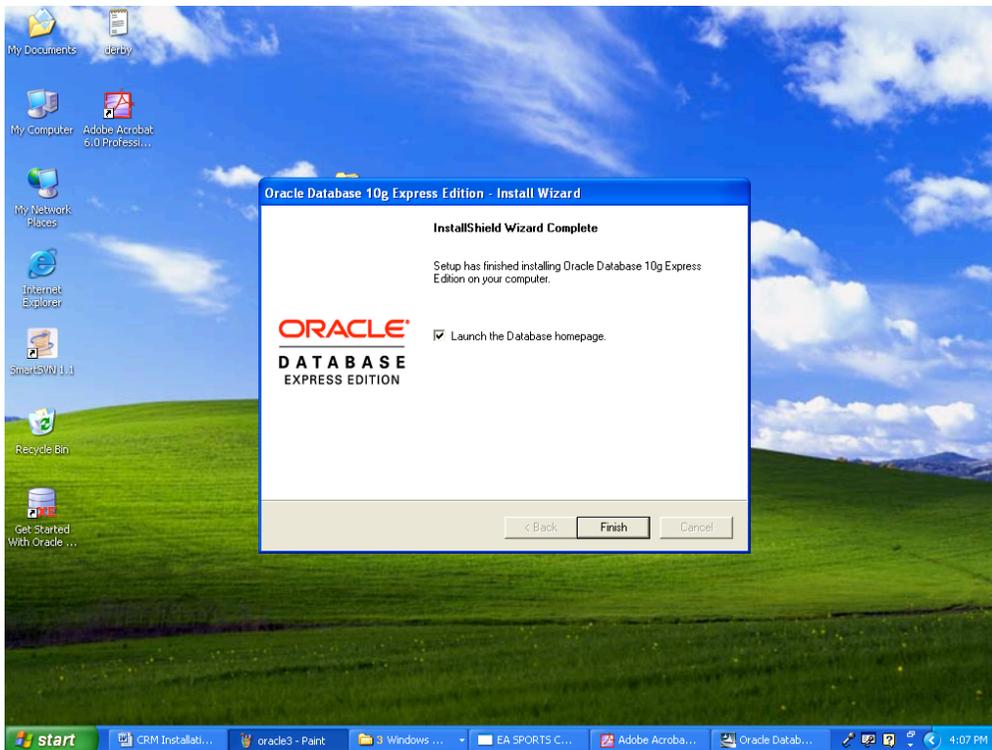
2. Click on Next



3. Select "I accept the agreement".
4. Click Next until the Installation prompts for a password.



5. Enter Password twice. Click on Next.
6. Click on Install. Installation will be completed successfully.



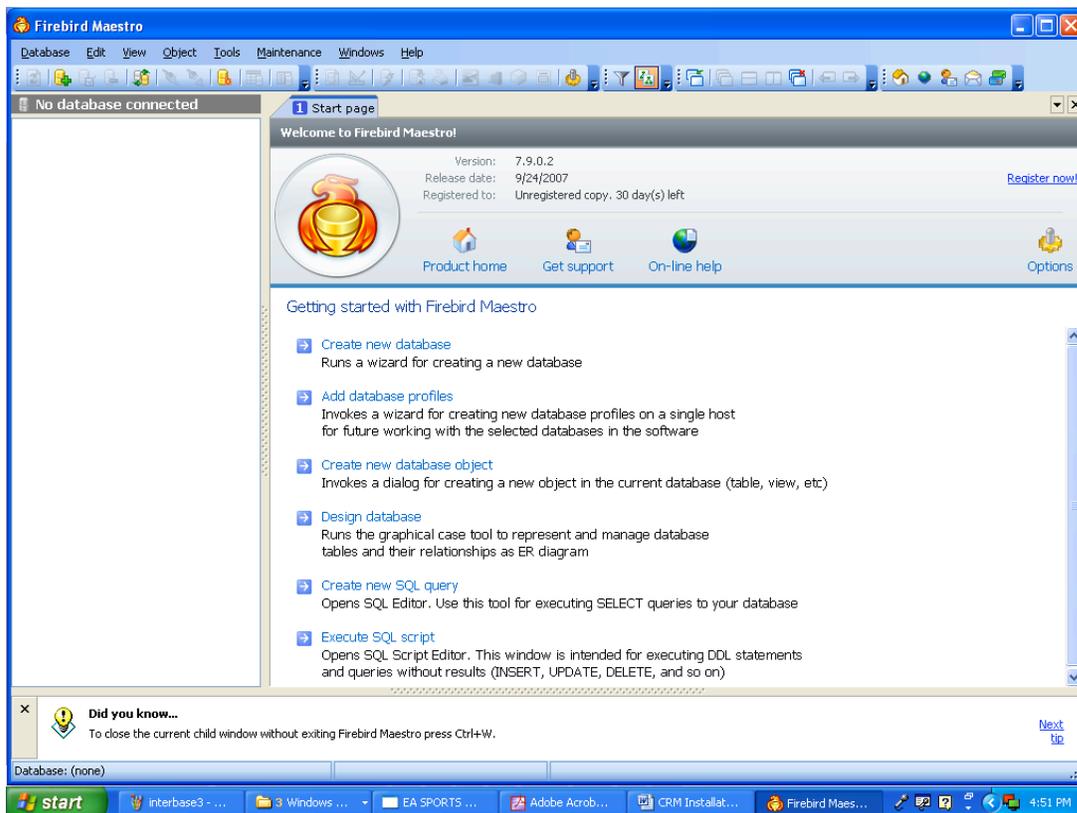
7. Please note Oracle 10G Express will have a default database XE. During the installation of ConcourseSuite you have to enter database name as XE, the user name as system and the password as the one you specified in step 4 when the installer prompts for the database settings.

NOTE: There is no need to create an empty database for ConcourseSuite when using the database server.

FireBird

Installation Steps:

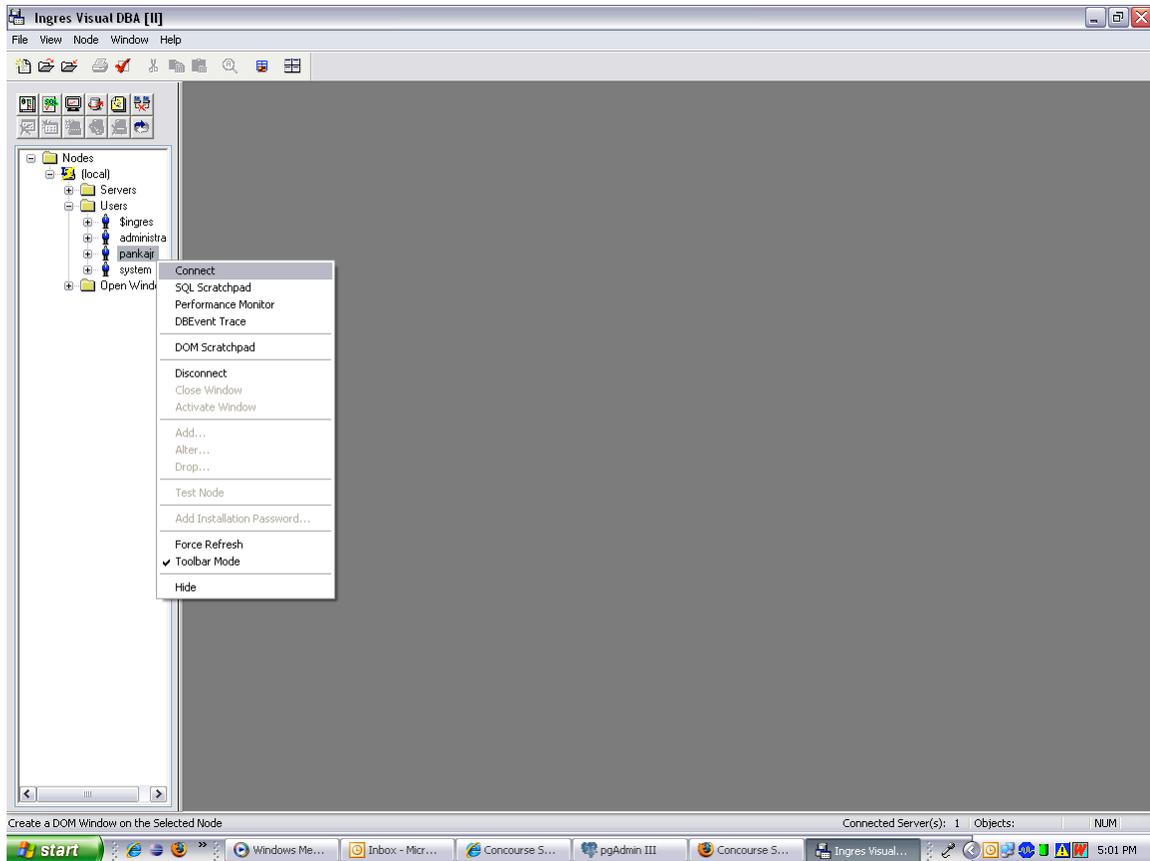
1. Install Firebird.
2. Install the Maestro tool.



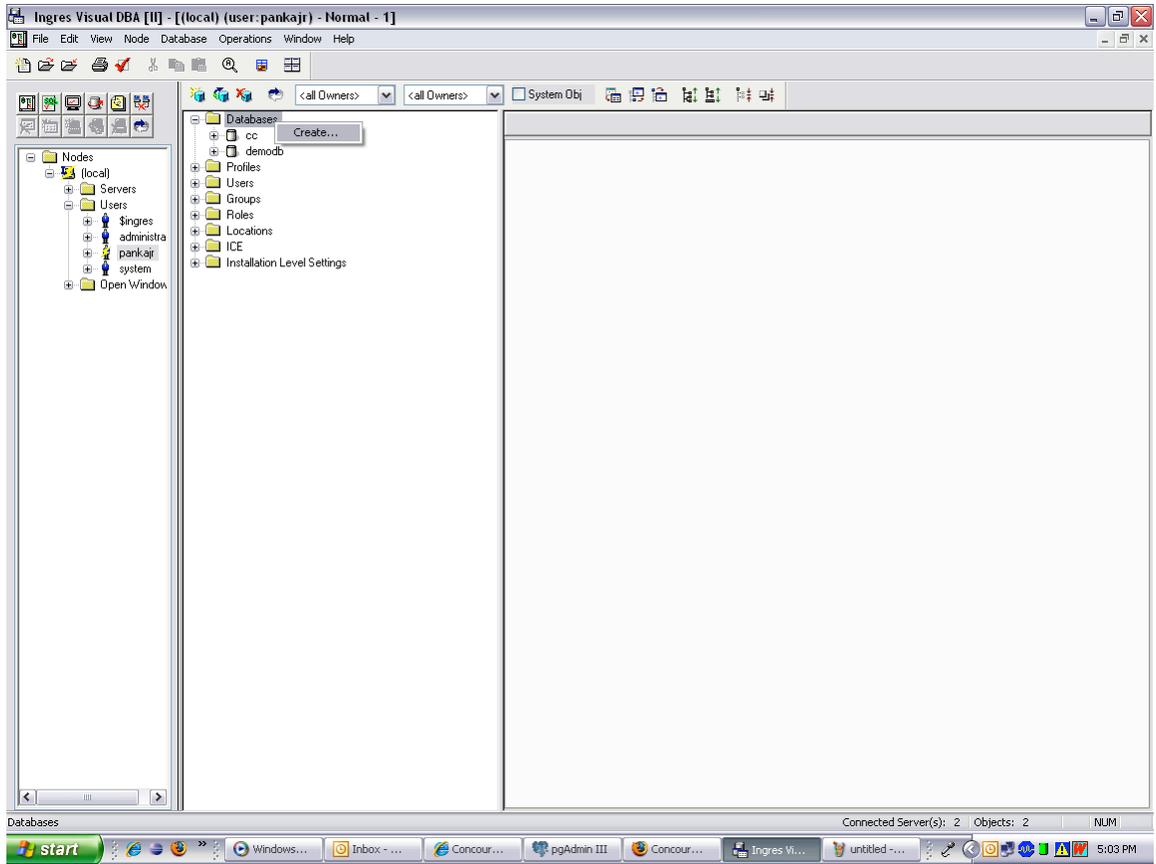
3. Click on Create new Database link.
4. Browse the path to store the database and enter the database name as "centric_crm".
5. A database will be created successfully.
6. When the ConcourseSuite installer prompts for the database settings, you have to enter the database name as "centric_crm" (specify the full path of the database like e:\centric_crm), the user name as "sysdba" and the password as "masterkey".

Ingres Database Installation Steps

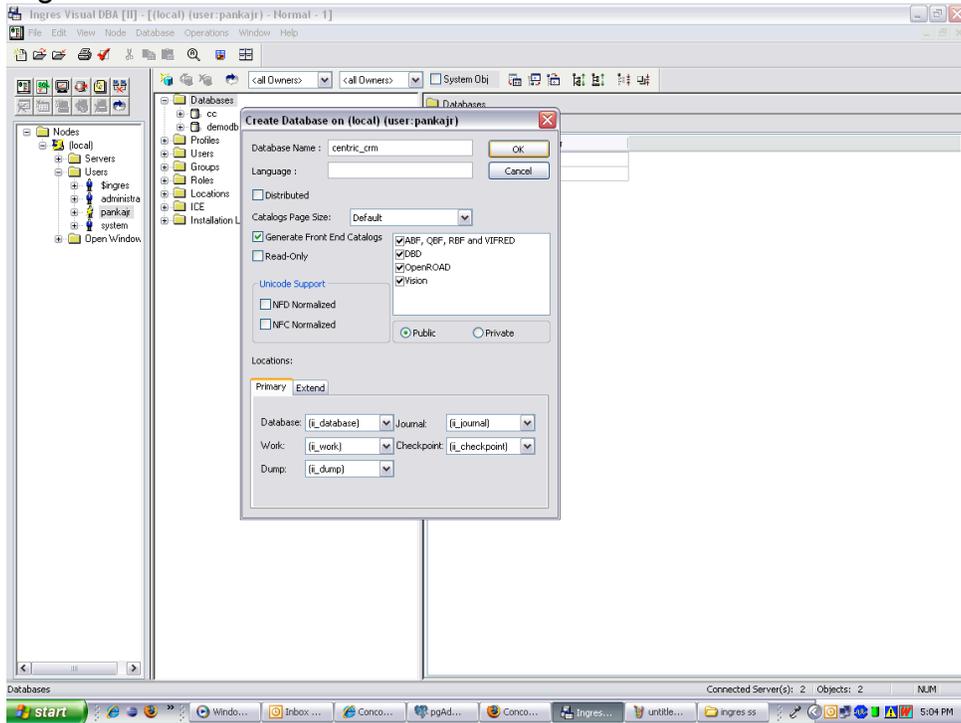
1. Install Ingres
2. Open Ingres Visual DBA



3. Select a User, right click and then click on connect

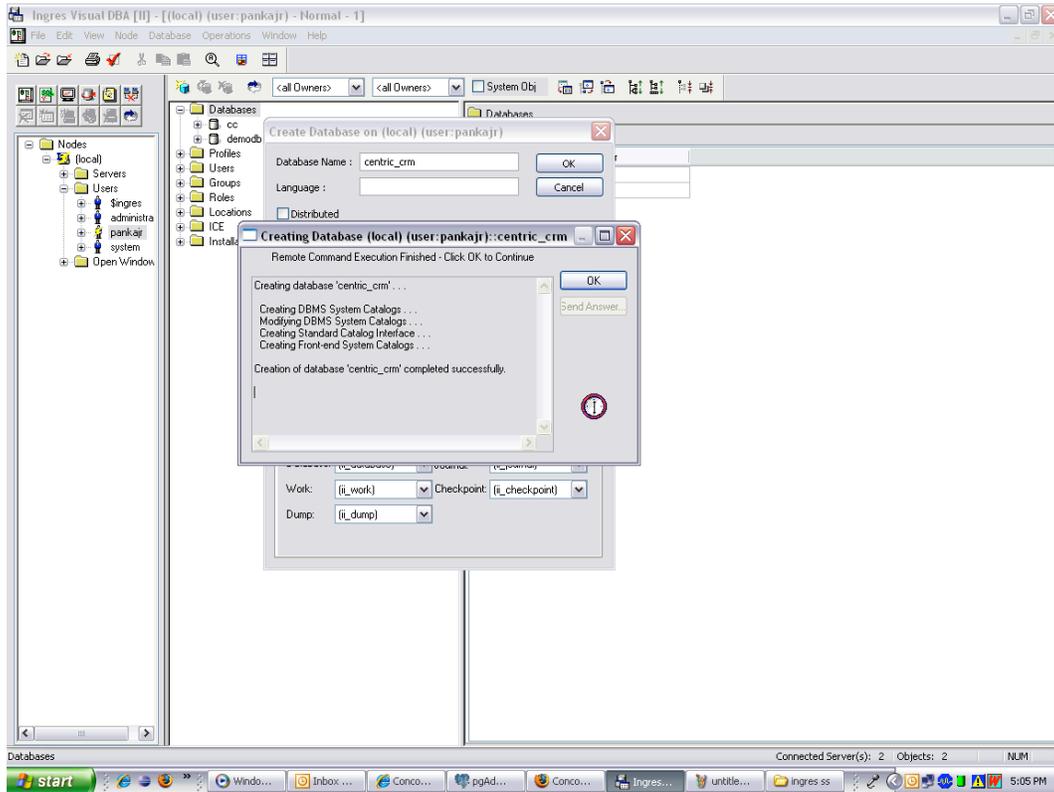


4. Right click on Databases and then click on Create.



5. Enter the database name as "centric_crm".

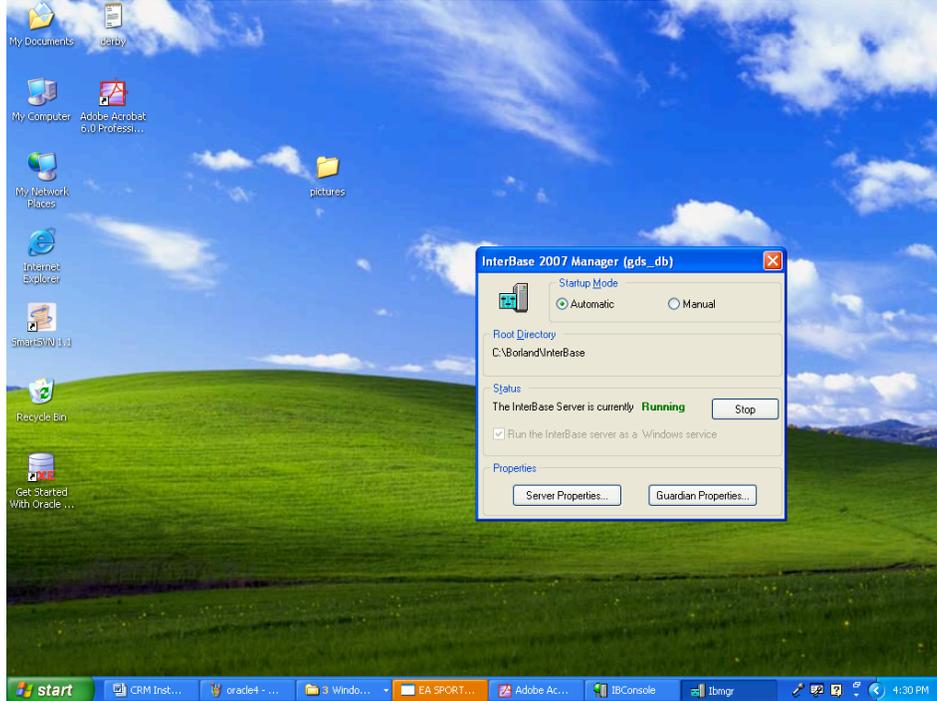
6. Click on OK



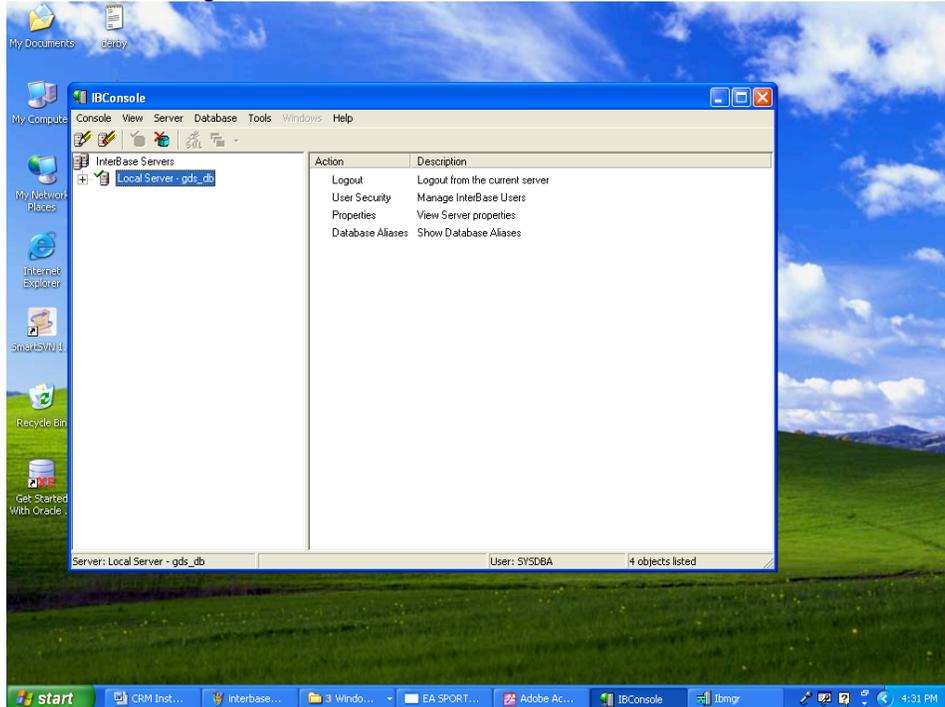
7. The database will be created.

Interbase Database Installation Steps

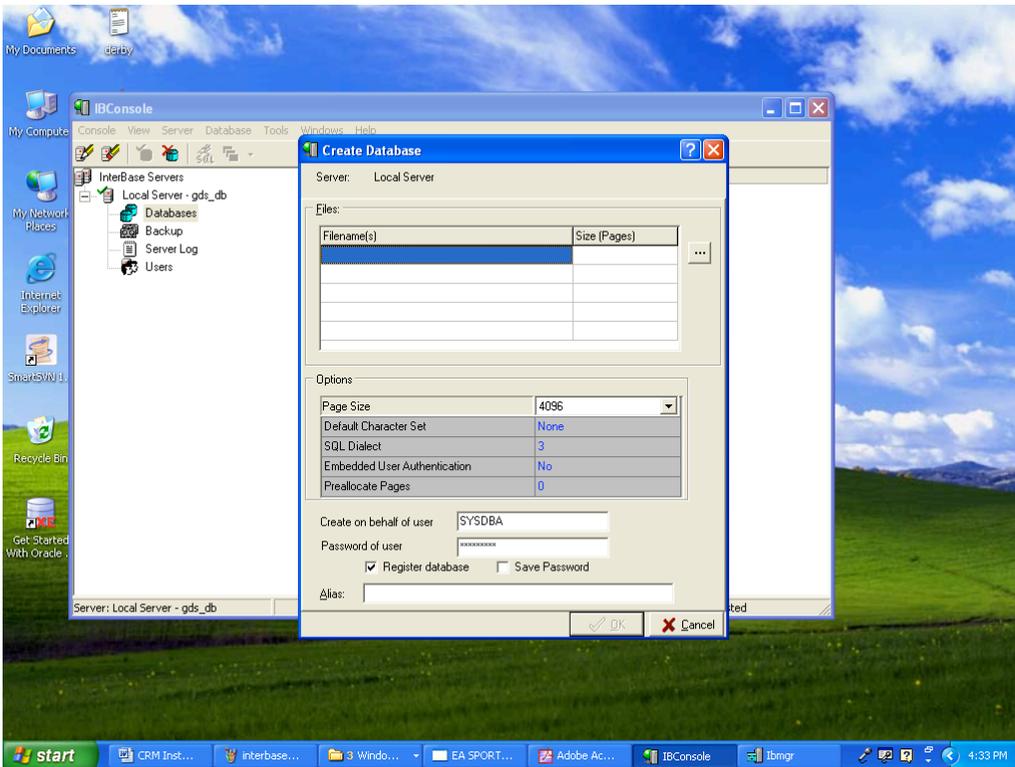
1. Install Interbase
2. From Start -> Programs -> Borland Interbase 2007 click on Interbase server manager



3. Click on start
4. From start -> Programs -> Borland interbase 2007 -> click on IB console



5. Double Click on the Local Server.

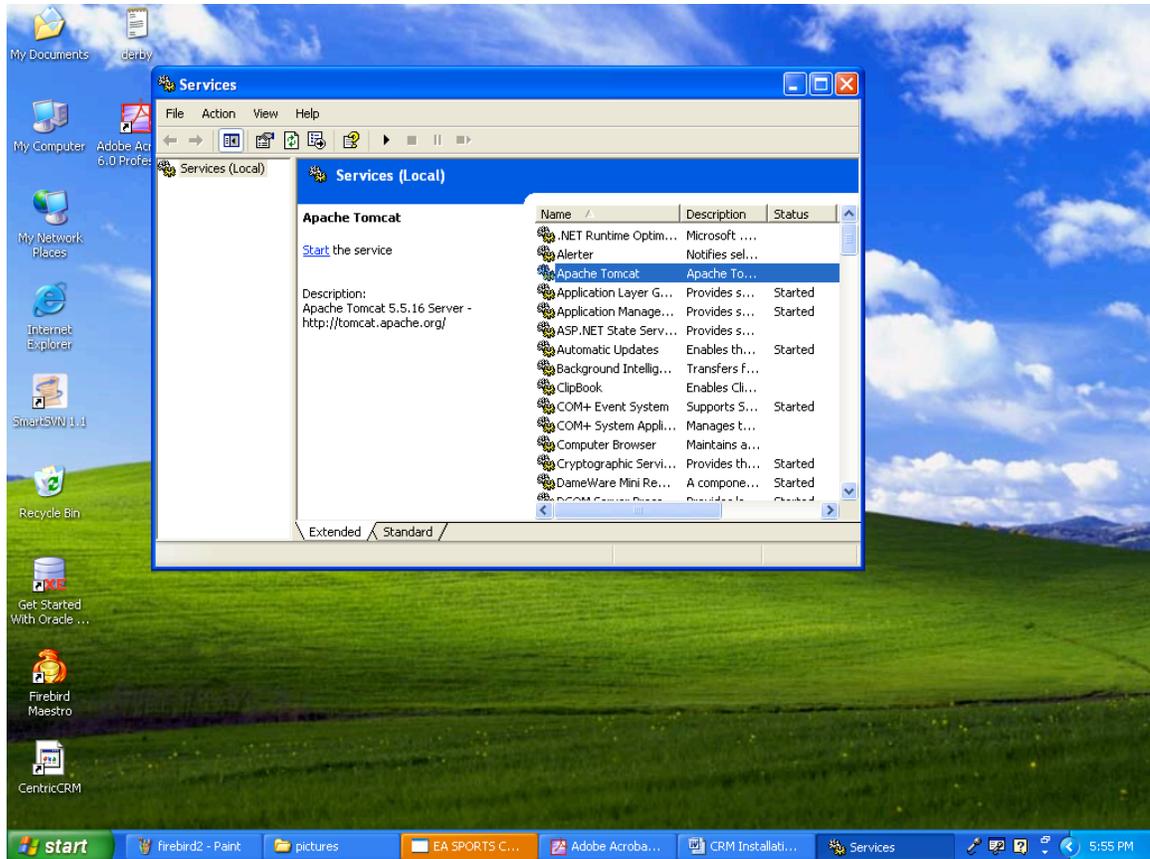


6. Right Click on Databases and then select create.
7. Browse the path and specify database name as centric_crm. Specify the alias name as "centric_crm". Click on ok.
8. Database will be created successfully.
9. When the ConcourseSuite installer prompts for the database settings, you have to enter the database name as "centric_crm" (specify the full path of the database like e:\centric_crm), the user name as "sysdba" and the password as "masterkey".

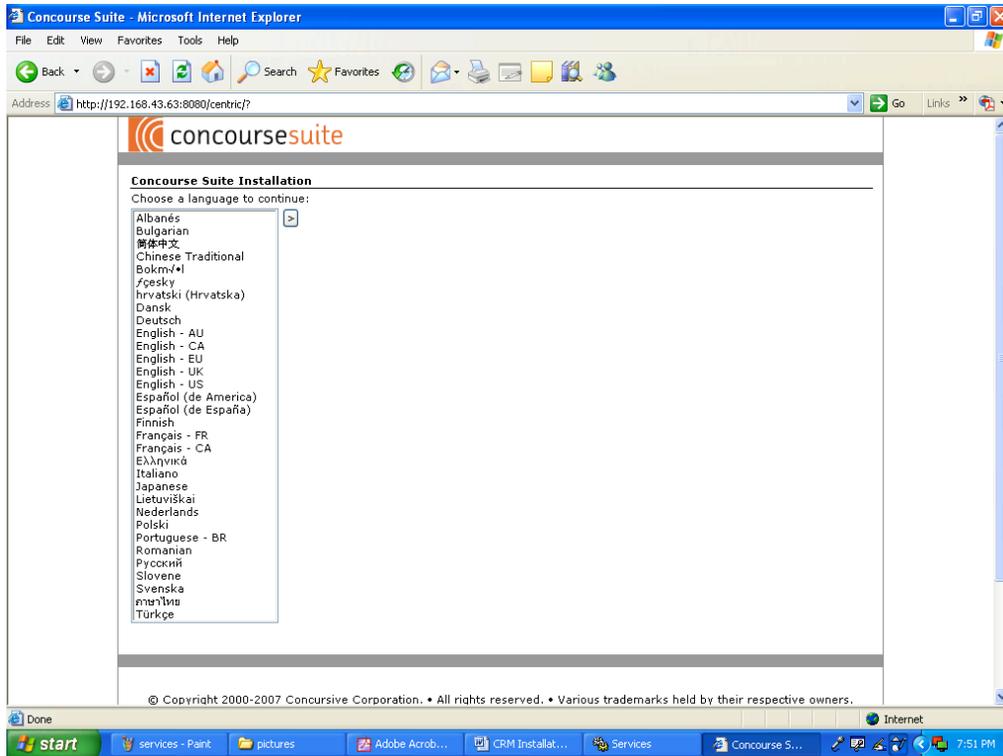
Configuring ConcourseSuite

Installation steps

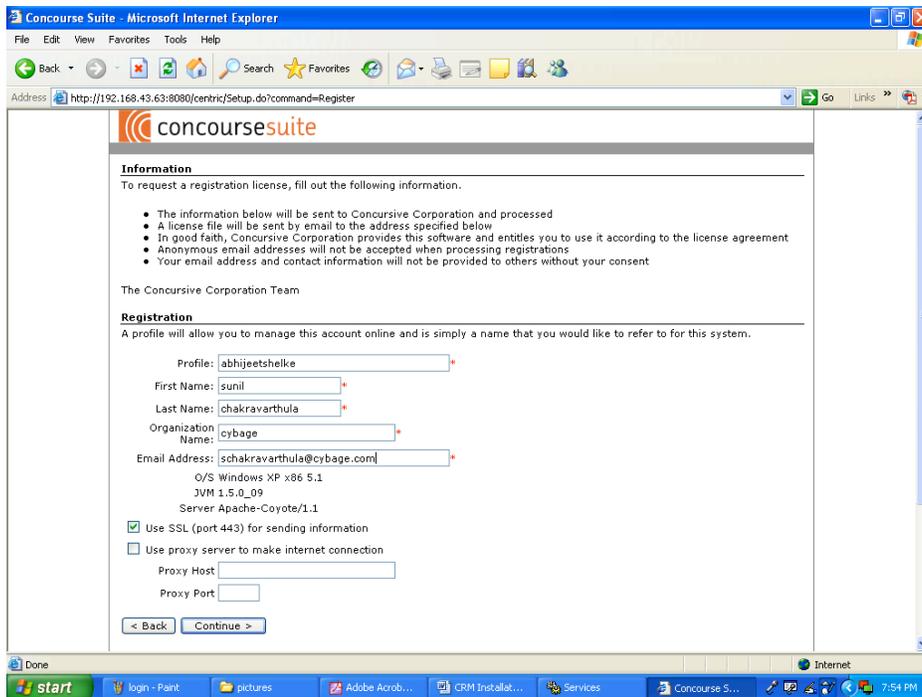
1. Remove the centric folder in Tomcat / Webapps and Work folder.
2. Copy latest concourse.war file into the Tomcat webapps folder.
3. Start the Tomcat services.



4. Start a web browser and enter the address <http://localhost:8080/centric>.

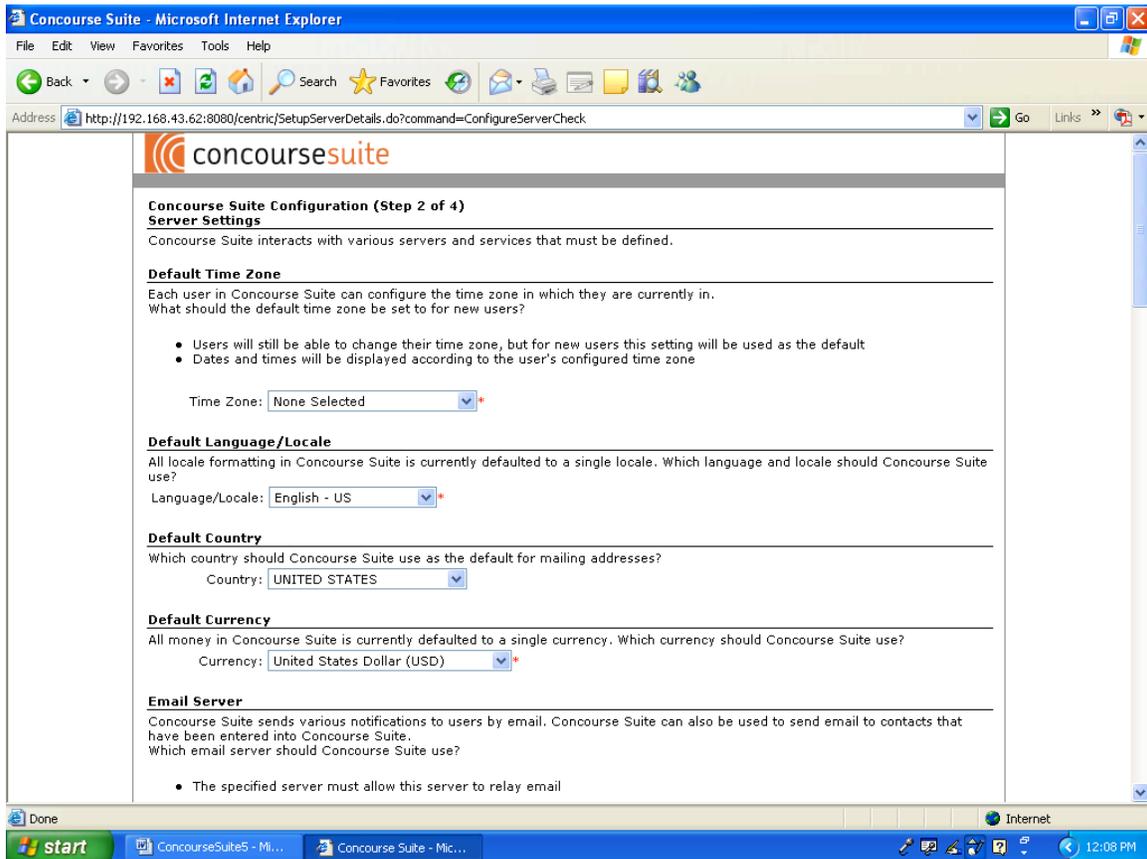


5. Select English – US and then click the arrow to continue.

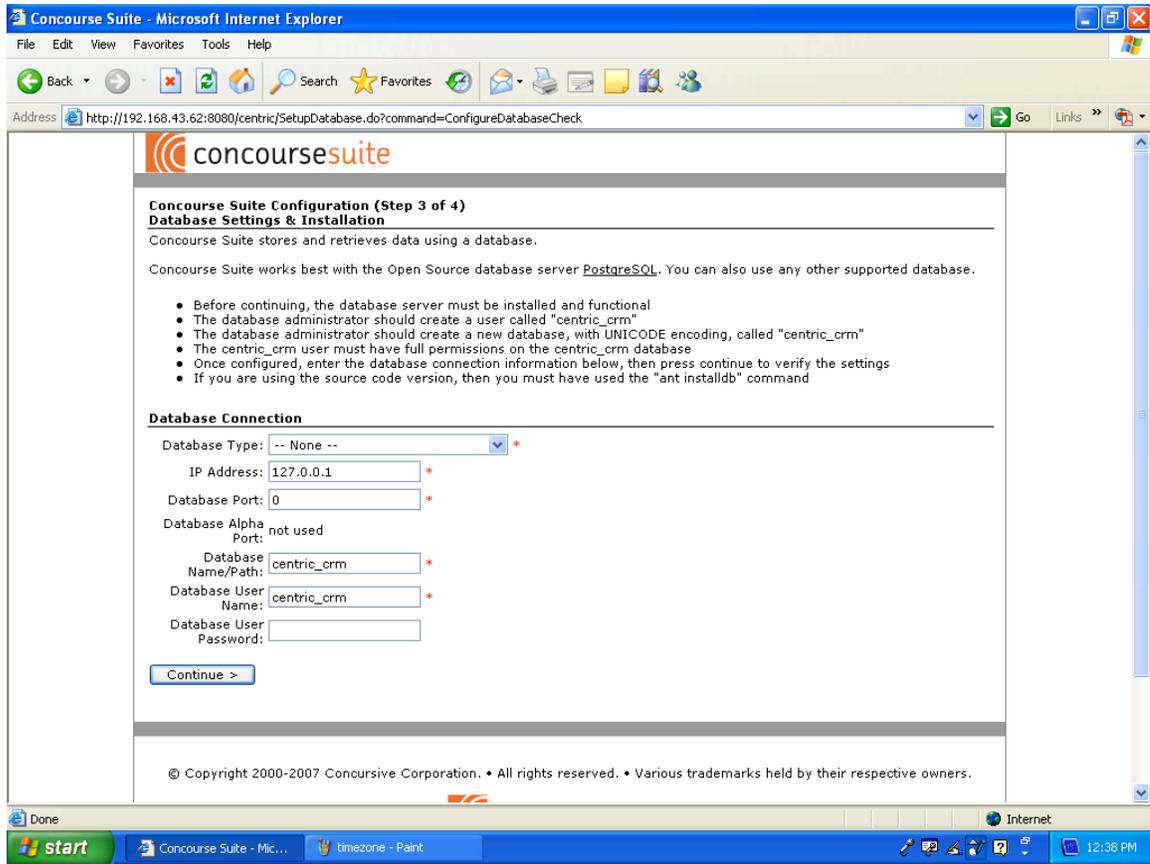


6. Enter your contact information and then click Continue. Click Continue again.

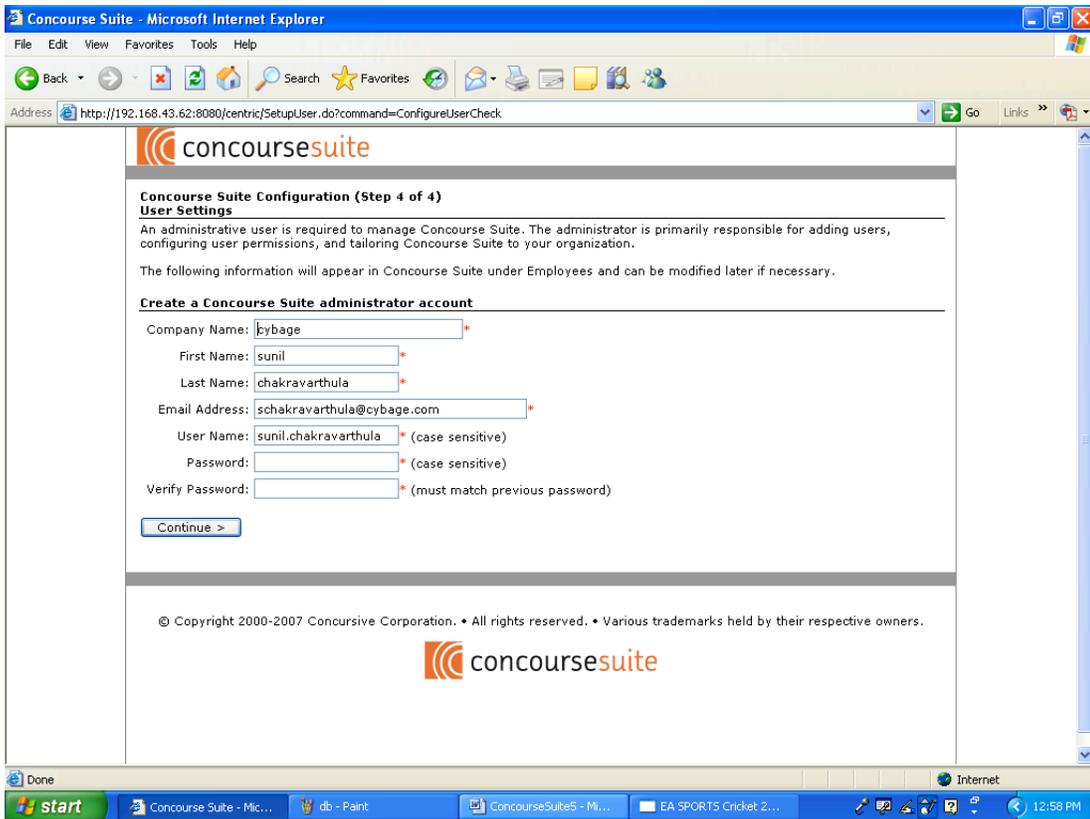
7. Within a few minutes you should receive an email with a license file attached. Copy the contents of the license and paste it into the box the ConcourseSuite installer is displaying.
8. Click on Continue. Click on Continue
9. Enter the target directory
10. Click on continue. Click on Continue



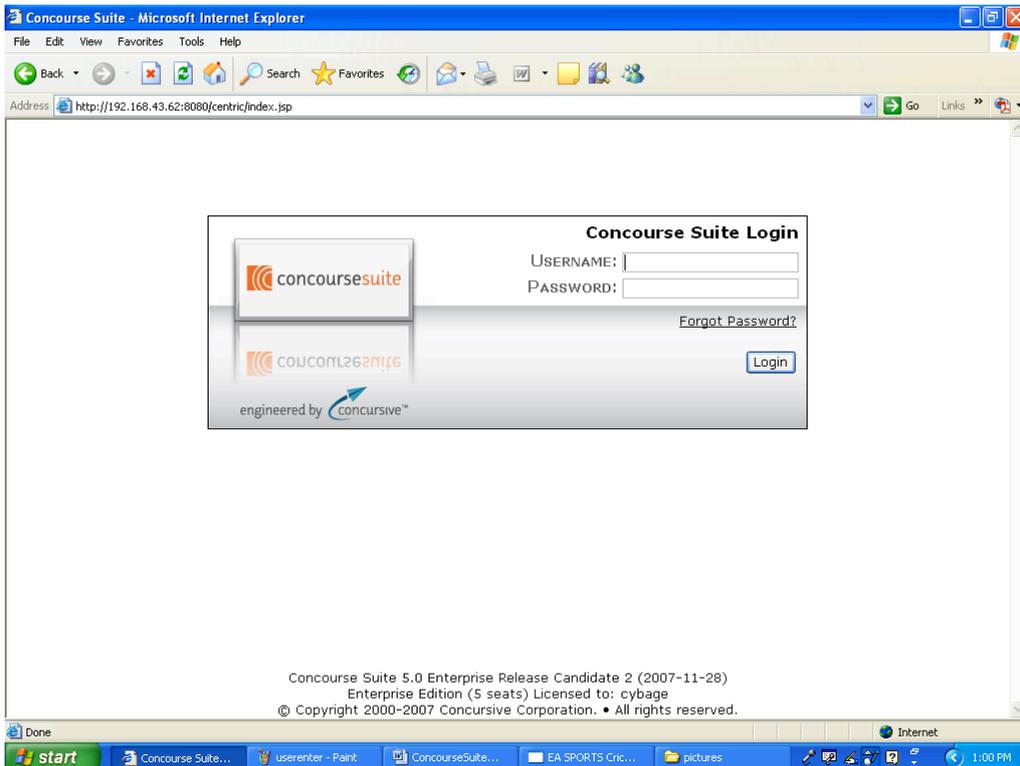
11. Select the time zone. Enter a domain name, email address and other site-specific information as necessary. Click Continue.



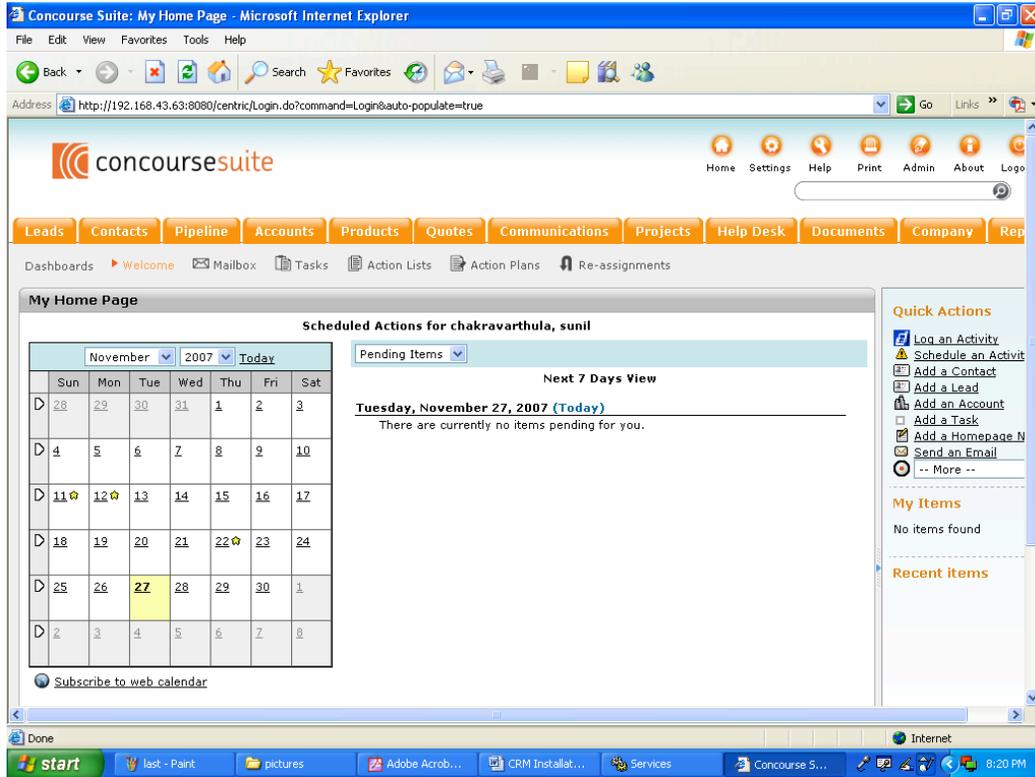
12. Create an empty database for all databases except for Oracle 10G express, daffodil and Derby. For more information on database installation and configuration please refer to the appropriate section in the "Setting up a database server" section of this document.
13. Select the Database type.
14. Enter Username and Password except for daffodil and Derby databases. For more information on Databases Please see "Setting up a database server".
15. Click Continue. Click Continue again.
16. Once the database is ready, click Continue.



17. Enter Username and Password. Renter Password. Click Continue.
18. Click Continue.



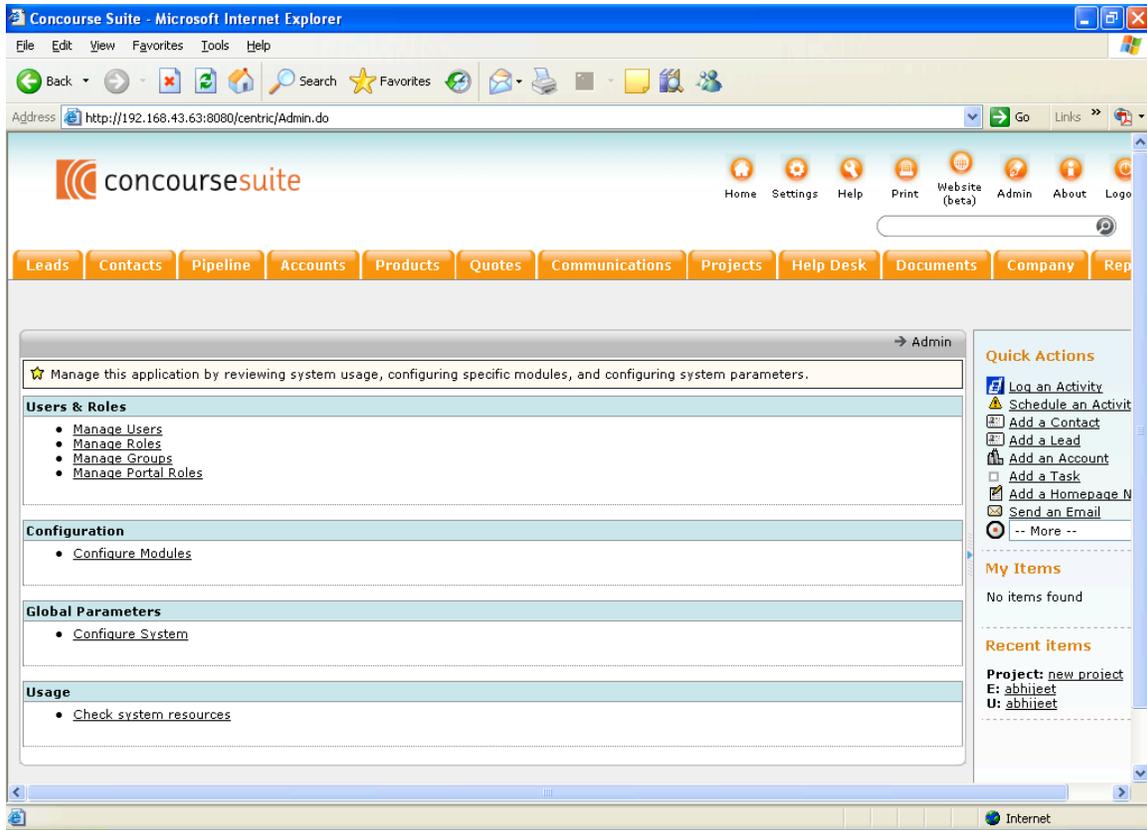
19. Enter the Username and Password and click Login.



22. If you see the above screen, you have successfully installed ConcourseSuite and you are ready to begin using the product.

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

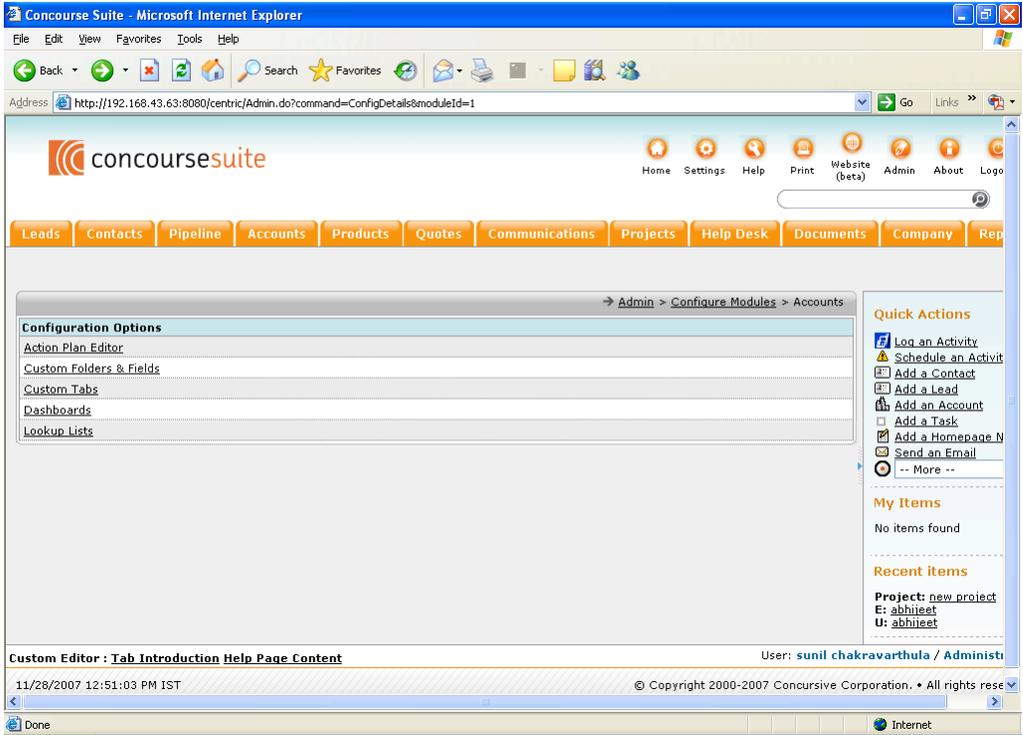
24. Complete the configuration by accessing the Admin tab of the application. Configure modules, roles, and users based upon how your company will use the application.



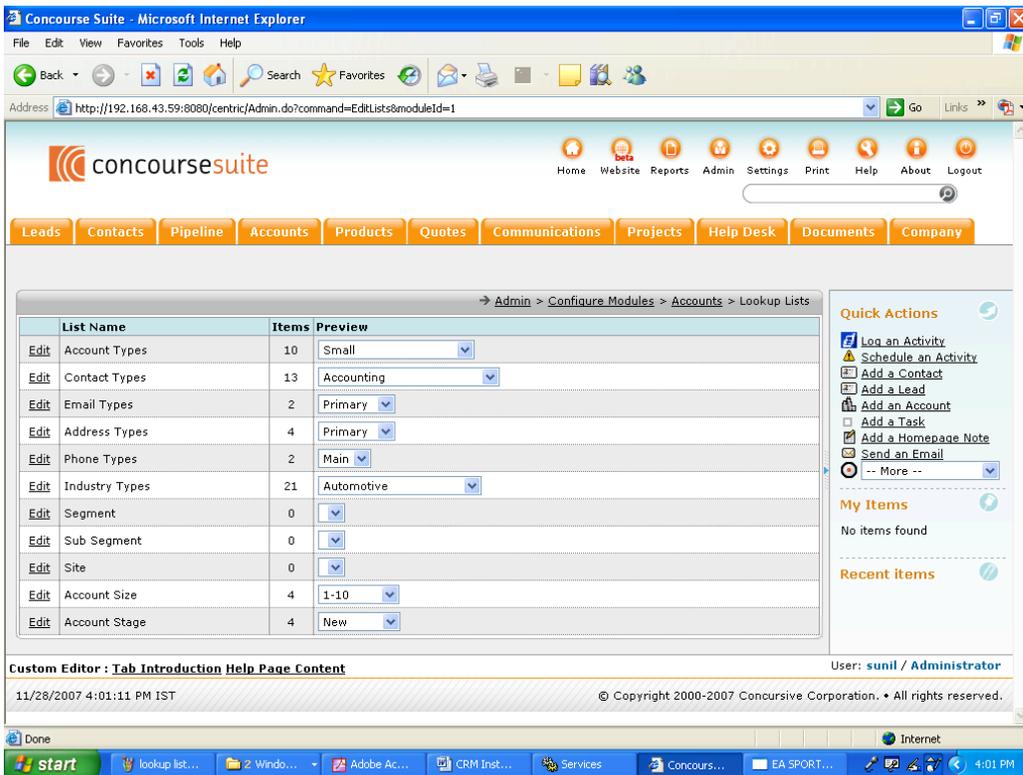
Configure Lookup Lists

Lookup lists contain the drop-down menu choices that a user will see when adding or modifying data in a module. The administrator should review each Lookup list to understand its use. Values can be added, renamed and removed at any time.

Lookup lists can be found in Admin -> configure modules -> module name



Click on lookup lists. There are a number of lists that are not populated with selections. This provides the Administrator the flexibility to populate those lists with data that is meaningful to their organization.

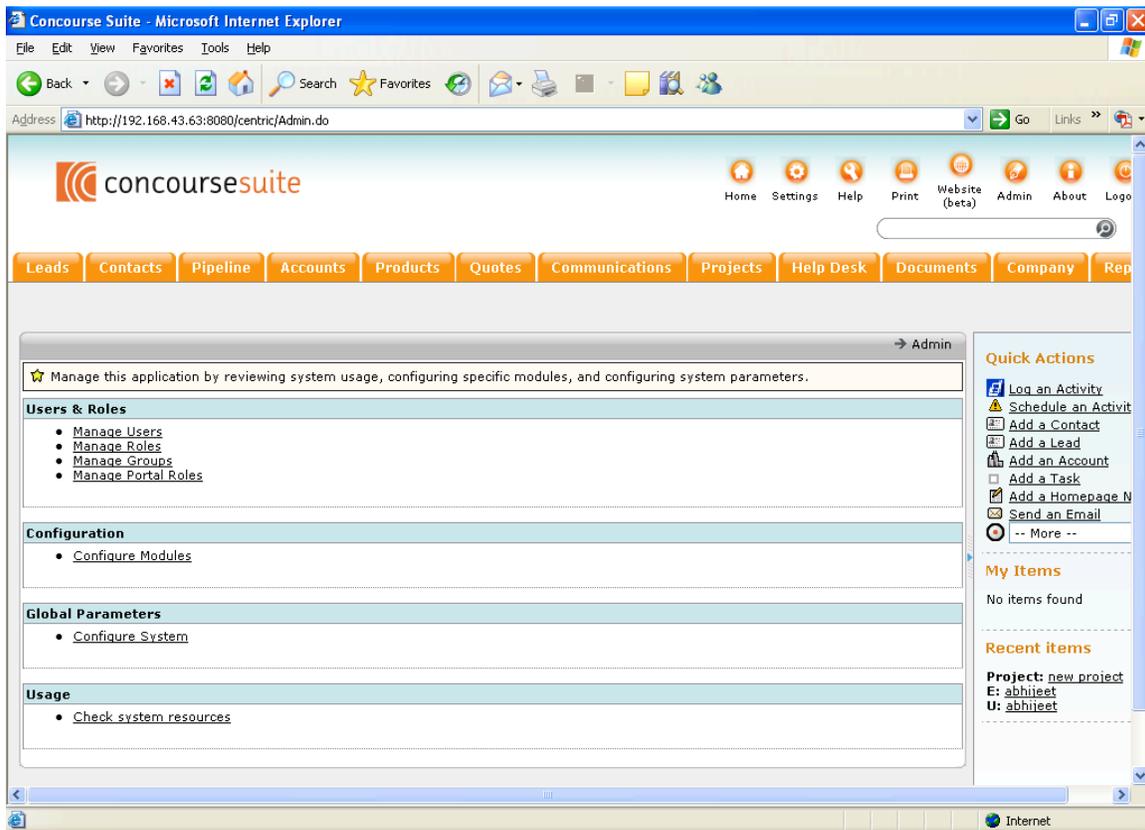


Configure Custom Folders and Fields

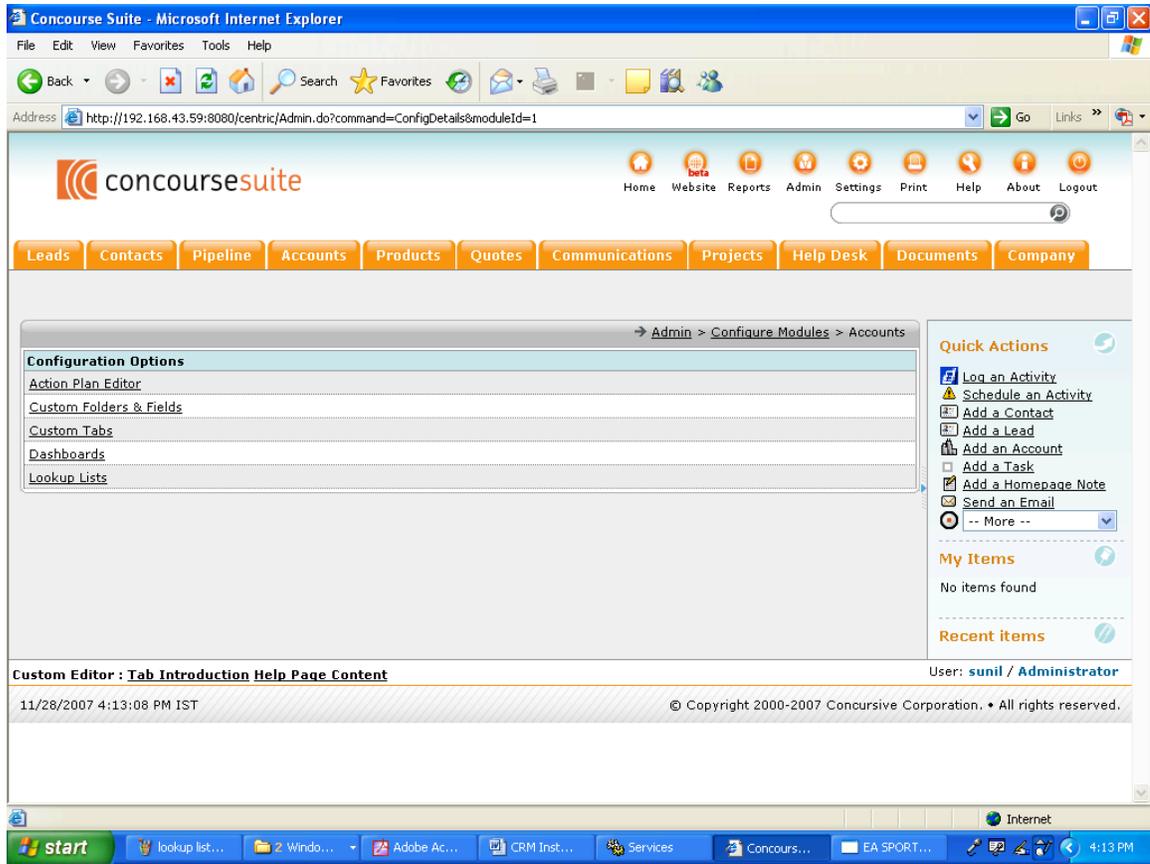
This editor allows you to create custom forms that can be attached to Contacts, Accounts, Employees, Opportunities and Tickets using arbitrary fields.

Custom Folders & Fields can be found in Admin -> configure modules -> module name

1. Click on the Admin button at the top of the screen.



2. Click Configure modules.
3. Click Accounts.
4. Click Custom Folders & Fields.



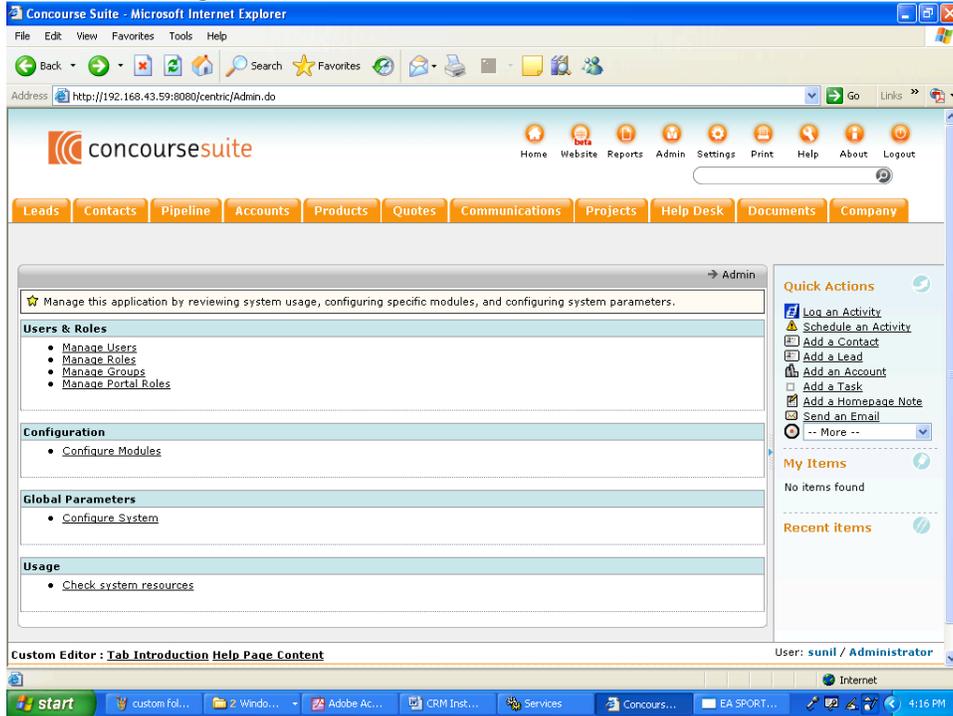
Configure Dashboards

ConcourseSuite has a new feature that allows the Administrator to configure different views (called dashboards) in most modules. As the Admin, under configure modules, you may choose a module such as “Accounts” and select Dashboards. Some modules have pre-built dashboards (standard) that can be activated. In many cases a custom dashboard can be built for different users and roles. This is a very powerful feature of ConcourseSuite. Permission to view Dashboards must be provided in two separate areas. Each user role can be configured to allow viewing of dashboards on a per module basis. Within each module the dashboard can be configured and you can grant permission for each role to view a custom dashboard within a module on a dashboard by dashboard basis. This permits you to present different views of the same data for different user roles.

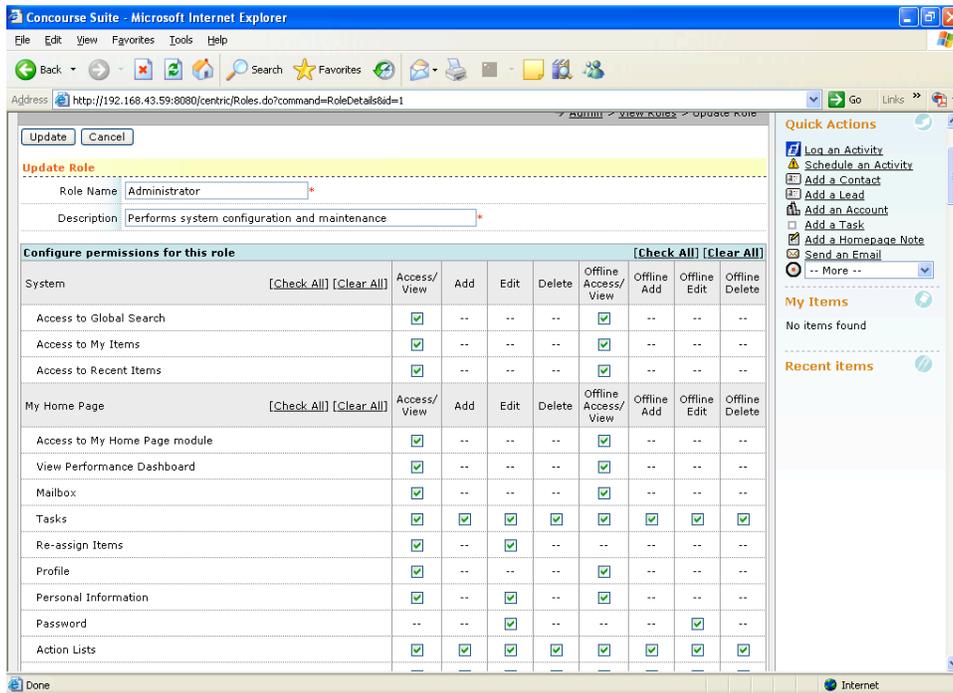
Configure Roles and Permissions

Preloaded roles can be renamed and modified to meet the needs 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 each of the specified features.

1. Click on Admin
2. Click on Manage Roles.



3. Click on Role name.



4. The administrator can modify the permissions for any of the roles. In order to preserve the default roles and permissions, we recommend a new role be created or an existing role cloned which the administrator can then name and modify as necessary.

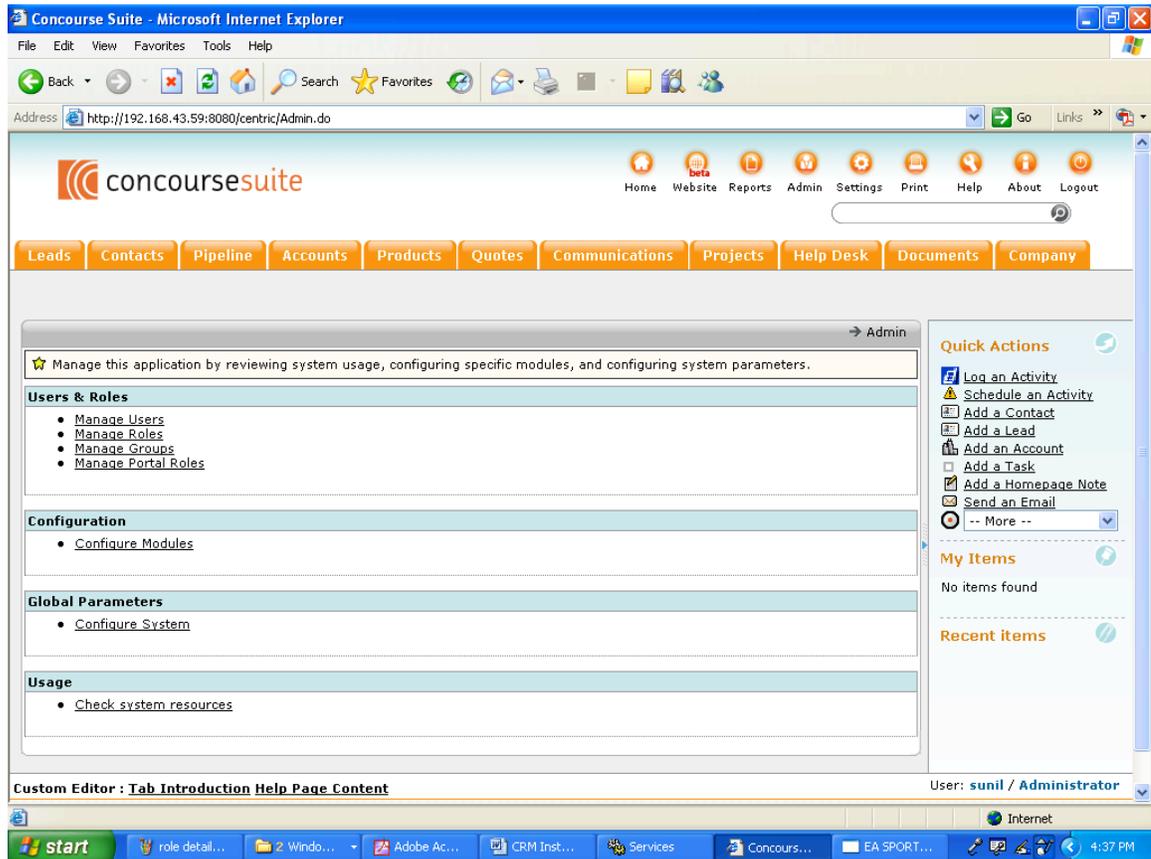
Add Users

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

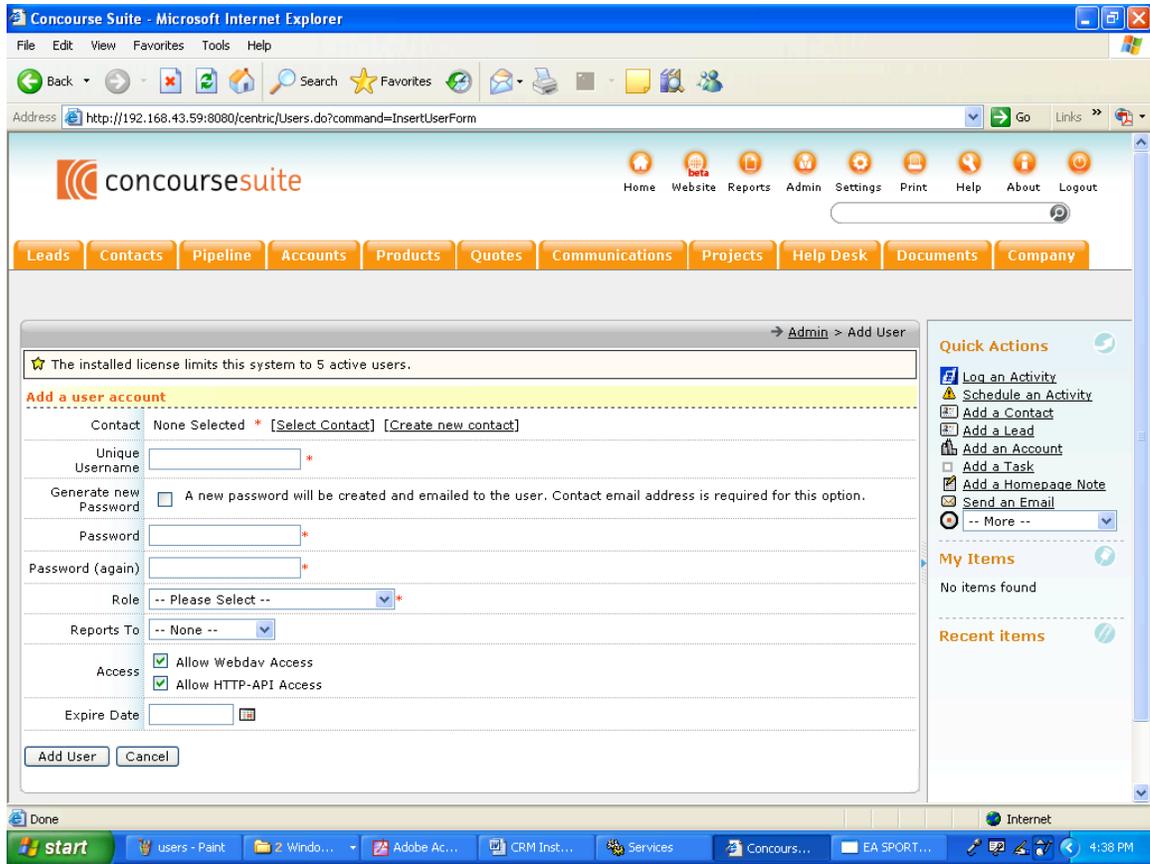
The current LDAP implementation only validates the user's password against LDAP; the user must still be entered into ConcourseSuite as a user. The change password feature will not work in ConcourseSuite for LDAP users.

Adding a User:

1. Click the Admin button.



2. Click Manage Users.
3. Click Add new User



4. Enter the details and click the Add User button.

Advanced Technical Topics

Database Backup and Restore

PostgreSQL

- pg_dump
- psql IBM DB2 Microsoft SQL Server Firebird SQL

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 all of 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 centric_crm database.
3. Copy the ConcourseSuite .war file from the production server into the Tomcat's webapp directory on the backup server.
4. Copy the fileLibrary directory from the production server to the backup server.
5. In the fileLibrary, review and modify the build.properties file, as 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 it's 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 all the available application servers. 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, and then deployed. This occurs 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.

5. Quick Action “Send an email” emails do not show the email in the sent email box when looking at email using the Home Page -> Mailbox link and setting the mailbox to view to sent (outbox). The “Mailbox” link on the home page is a feature that allows users of Centric CRM to exchange messages and can see such messages under Inbox/Outbox. The “Send an Email” link under quick actions allows a user to send an email message to Contacts outside Centric CRM as email messages and will be tracked under Contacts. The “Send an Email” and “Mailbox” are two independent features and were never designed to be treated as one feature or related features.

6. When uploading an image greater than 2 MB in size under the Documents tab “the requested page not found” error may appear. This is a configuration issue that can be corrected by increasing the browser memory. How to change the tomcat memory configuration:

Go to Tomcat5.5 -> bin -> click tomcat5w(Prorun service manager)

or

Start -> Programs -> Apache tomcat5.5 -> configure tomcat

It will open Apache tomcat properties window

Click java and provide values

Initial memory pool : 256 mb

maximaum memory pool : 512 mb

Click Apply -> OK.

Restart Tomcat.

7. If an Ingres database is not configured with sufficient memory a com.ingres.gcf.util.SqlEx: QEF is out of memory error may be encountered. This can be corrected by increasing the memory as follows:

Ingres configuration manager -> DBMS server -> default -> Derived -> 67
qef_dsh_memory -> edit value (By default it was set at 81920000 bytes)
Try setting it to 100000000 bytes
after changing click close (in alert window click save).
Restart the database.

8. Portal users may encounter the following behaviors that are based on the roles/permissions assigned:

If portal user is given access to the Projects module and no access to the Accounts or Account records then he will not be able to login. They will see the warning message”

“An Error Has Occurred.
The system administrator has been notified.
You do not have the permissions to perform this action.”

If the portal user is only given access to the Projects module and access to Account records (but not access to accounts) then the page they see shows the account record instead of the Project module.

9. A user must have the “View Performance Dashboard” permission to login and open My Home Page.

10. Uploading large images in the Product module can cause a java.lang.OutOfMemoryError: Java heap space. This can be fixed by adjusting the heap size. The java heap size can be increased using the following runtime parameters: java -Xms<initial heap size> -Xmx<maximum heap size> Defaults are:

```
java -Xms32m -Xmx128m
```

11. In order for the module Help pages to work, an Introduction screen must be created first. Once this is done, then create a Help page and it will be displayed. The Custom Editor is used to do this and permission to access the editor is granted by an administrator in the Admin -> Configure Roles section.

12. Systems upgraded to ConcourseSuite 5.0.5 from 4.1.x using MySQL may encounter an SQL error when modifying a custom folder and unchecking the form field for "multiple records" or "enabled" when these fields were previously checked and saved.
13. Systems using a new installation of ConcourseSuite 5.0.5 and a DB2 database will not be able to edit and save draft categories. Installations that have been upgraded from a prior release do not seem to exhibit this behavior.
14. If upgrading a system using the Derby database in Centric CRM versions 4.1.1 through 4.1.2, if an attempt to populate a custom field was made and an error was received at that time in the 4.1.x instance, the upgrade will fail. Deleting the account or contact associated with that record will not fix this.
15. Entering large text descriptions for "Long description" and "Special notes" when saving new items for a Quote may generate an SQL error. It is recommended the description be kept to 255 characters or less to avoid this problem.
16. Adding descriptions in excess of 255 characters may generate an SQL error in the Product or the Campaign modules for some databases.
17. In ConcourseSuite 5.0.5 the cancel button is missing from the Schedule an Activity window. You can either simply navigate away from the activity entry page or use the blue toggle menu option Cancel to cancel the activity once you have created it.
18. In ConcourseSuite 5.0.5 the website "Back to Category" link does not work after using the "Email this item to A Friend" button.
19. In ConcourseSuite 5.0.5 in some installations iCal will only sync the first time due to authentication issues.
20. In ConcourseSuite 5.0.5 under Admin > Manage Groups you can not add a user based on account type.
21. In ConcourseSuite 5.0.5 when importing records, any record with a value mapped to the SIC field will fail.
22. In ConcourseSuite 5.0.5 under certain circumstances, the warning that appears identifying dependencies for deleting a product may display the wording for deleting a website instead. However the dependencies identified appear to be correct and the proper items are deleted.
23. In ConcourseSuite 5.0.5 when using the quick action link Schedule an Activity to create the associated contact will not automatically populate the

selected contact. You will have to search and select the contact once you have created it.

24. In ConcourseSuite 5.0.5 the Leads module only reflects "working" as a status if the lead has been converted to a Contact or an Account. Creating a Note, sending a Message or Scheduling an Activity for the lead will not change the displayed status to working.

25. When modifying a Knowledge base ticket, the Opera browser will not display or save modifications entered for the description field. Other browsers do not appear to have this issue.

26. In ConcourseSuite 5.0.5 clicking the "Skip this Lead" button when viewing a Lead Details page after a search is performed will take you to the Leads overview page.

27. Searching by stage in accounts returns all contacts if the "Include contacts" check box is selected, not just those meeting the search criteria.

28. Action Plan does not correctly reflect the days elapsed if a user "unchecks" a step and then moves forward on the plan.

29. The "Associate with Ticket" functionality for emails received in Help Desk module does not work when using the Safari browser. This appears to function properly when using other browsers.

30. The Licensing server still refers to Centric CRM instead of ConcourseSuite.

31. Entering large values for the Estimated Level of Effort using the Quick Action link will result in the value being converted to scientific format. If attempting to modify the entry you will have to re-enter the value in integer format in order to save any changes, otherwise an error message will appear.

UPGRADE COMPATABILITY MATRIX FOR 5.0.5

| Database | Release 4.1.1 | Release 4.1.2 | Release 5.0 | Release 5.0.1 | Release 5.0.2 | Release 5.0.3 | Release 5.0.4 | Release 5.0.5 |
|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Postgres | √ | √ | √ | √ | √ | √ | √ | √ |
| Derby | √ | √* | Fresh install | Fresh install | √* | √* | √* | √ |
| DaffodilDB | √ | √ | Fresh install | not supported |
| DB2 | √ | √ | Fresh install | Fresh install | √ | √ | √ | √ |
| MSSQL | √ | √ | √ | √ | √ | √ | √ | √ |
| MySQL | √ | √ | √ | √ | √ | √ | √ | √ |
| Oracle | √ | √ | Fresh install | Fresh install | Fresh install | √ | √ | √ |
| Ingres | not supported | not supported | Fresh install | Fresh install | Fresh install | √ | √ | Fresh install |
| Interbase | not supported | not supported | not supported | not supported | Fresh install | √ | √ | not supported |
| Firebird | √ | √ | not supported | not supported | Fresh install | √ | √ | not supported |

NOTE – if an attempt to populate a custom field inside a folder was made for release 4.1.1 or 4.1.2 and the Derby database was used the attempt would have failed. If this is the case then you most likely will not be able to upgrade to a later version. This appears to be an issue specific to the Derby database.