

Update Instructions for Control 4.6 and greater to Control 6.0

This document outlines the steps you will need to take to upgrade Control 4.6 or greater to Control 6.0. Below is a checklist to follow, and detailed instructions for each step along the way. Of course, if you do run into problems, Cyrious Technical Support is ready to assist you.

The basic steps involved in the process are:

- Verify your server meets the Control 6.0 requirements.
- Verify you are a candidate for the upgrade installer.
- Download the update.
- Backup your data.
- Shut down your system so no one is running.
- Reboot the server.
- Run the server upgrade.
- Reboot the server.
- Check the server.
- Re-start Control.

There should be no need to do anything on any of the client machines.

Ready? Let's get started then.

I. Checklist

Verification	
☐	Your server is not running Windows XP, Windows 2000, or Windows 2003.
☐	Your server has a permanent internet connection.
☐	You are using only one Control database on your system
☐	You wrote down your Cyrious License Key on the Cyrious.com website and its configuration is correct.
☐	You are not using inventory in Control.
☐	You have no customized reports using inventory or warehouses.
Download	
☐	Download the installer file.
☐	Where is it saved? _____
Backup your Data	
☐	Backup your Control Database.
☐	Copy your backup to a thumb-drive or another computer.
Upgrade the System	
☐	Have everyone close Control.
☐	Reboot the server.
☐	Close the SSLIP if it restarts.
☐	Run the upgrade.
☐	Enter the License Key number when prompted.
☐	Confirm installation prompts when received.
☐	Reboot the server when completed.
Confirm the Upgrade	
☐	Log in to the server. Check that the SSLIP started up.
☐	Run Control on the server. Confirm you are able to connect.
☐	Open Order Explorer. Open, edit, and cancel 2 orders. Confirm there are no errors or price changes.
☐	Run Control on a client. Confirm you are able to connect.

II. Step by Step

These steps provide a detailed walk-through of the installation process. By following these steps, you will minimize the time Control is down and maximize the chances of a pain-free upgrade process.

A. Verification

☐	Your server is not running Windows XP, Windows 2000, or Windows 2003.
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Control 6.0 introduces new technology and capabilities. Operating systems that are no longer supported by Microsoft have not been upgraded to use this technology, and cannot be used as the server for Control 6.0. The following operating systems are no longer supported:

- Windows XP
- Windows 2000
- Windows 2003

If you are not sure which version of Microsoft Windows the server is running, you may find out in one of the following ways.

- Observe the startup screen after a reboot. The version is normally displayed.
- Click on the Start Button. Right Click on "My Computer" or "Computer". Choose "Properties". The version is displayed next to Windows Version or Windows Edition.
- Or Open Control Panel. Click on "System" to open it. If "System" is not displayed, click in the search bar and type "System". Then click to open it. The version is displayed next to Windows Version or Windows Edition.

☐	Your server has a permanent internet connection.
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Control 6.0 uses the Internet for authorization information. During the update process, you will have to input your license key number and it will be confirmed via the Internet. It is not possible to upgrade Control 6.0 without an Internet connection on the server. The security key (a.k.a. dongle) on the back of your server is no longer used after the initial installation. Subsequent authorization information is gathered from the Internet.

To confirm you have Internet on the server, open a web browser and navigate to www.cyrrious.com (or some other URL). If the page comes up without errors, you have an Internet connection.

☐	You are using only one Control database on your system
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Some customers with multiple locations or who have started over with a new product set may have multiple Control databases they log into. However, the installer will only set up one

database in Control 6.0 when it upgrades. Accessing the others will require an additional step by Cyrious' Technical Support.

If you are running multiple Control databases, please contact Cyrious' Technical Support at 1-225-752-2867 and schedule a time when they will be able to assist you in the process.

☐	You wrote down your Cyrious License Key on the Cyrious.com website and its configuration is correct.
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Your License Key number is used by the installer to determine what to install and what you are authorized for. The first step in the installation process is to enter the License Key number. Without a valid License Key number, the installer will not proceed.

☐	You are not using inventory in Control.
☐	You have no customized reports using inventory or warehouses.

Control 6.0 introduces many new inventory features and changes. Customized reports involving the Inventory table in Control will have to be reworked for the new table structure.

If you are using the Inventory module in Control, please contact Cyrious' Technical Support at 1-225-752-2867 to review your system and reports **prior to** beginning the upgrade process.

B. Download

☐	Download the installer file.
☐	Where is it saved? _____

The Control 6.0 upgrade is downloadable as an executable file. Depending on your Internet speed, this could take from 2 to 40 minutes.

To download the file, open a web browser (Internet Explorer, Chrome, Firefox, etc.).

1. Navigate to www.cyrrious.com.
2. Log into the Cyrious Customer website.
3. Click on Training
4. Click on 4. Update Control.
5. Follow the on-screen instructions for identifying your version and downloading the update.

Your browser should download a file. Depending on the browser and your settings, it may or may not prompt you for a name and/or location. It may or may not prompt you to "Save", "Run" or "Open". You may also receive a notice saying this file is not frequently downloaded. This is normal; just click to download it anyway.

Save the file (without opening it) in a location you can find later.

C. Backup

☐	Backup your Control Database.
☐	Copy your backup to a thumb-drive or another computer.

Cyrrious recommends you backup your database daily, but especially before any upgrade.

To backup your database from within Control, perform the following steps. It is recommended you perform this on the server this time, though regular backups can be done from the client without having others log off Control.

- o Have all other users exit Control.
- o Open Control (on the server).
- o Click on Setup | System Setup. Click on "Backup Options" (about the 6th item down on the left).
- o Write down the "File Path" and name of the backup. The File Path is the location where the backup is copied to upon completion. Edit the name or path if necessary.
- o Close the System Setup screen.
- o Click on File | Backup Database.
- o Click "Yes" to confirm you want to create a backup.

The backup may take 20 seconds – 20 minutes depending on the size of your database.

Open Windows Explorer and enter or browse to the "File Path" location. You should see a file with the name of the backup and a ".bak" extension. Hover over the file with the mouse and the size and modified date and time should be displayed. Confirm you have the file you just created and the size is appropriate for your database.

Cyrrious recommends you copy the backup to another computer or a thumb-drive or similar. We have had customers who lost the entire drive, backup and all, in a hardware failure.

D. Upgrade the System

☐	Have everyone close Control.
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During the upgrade Control will be offline. Cyrrious recommends users close Control to avoid losing information being entered.

☐	Reboot the server.
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Reboot the server to ensure that all connections from Control and other shared resources are dropped.

☐	Close the SSLIP if it restarts.
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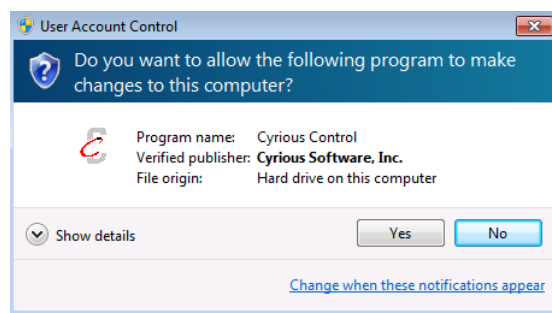
Log back into the system when it reboots. If the SSLIP automatically restarts (which is normal), you will want to shut it down. To close the SSLIP, locate it in the system tray (usually in the bottom right of the screen by the clock). Some operating systems hide icons in the system tray. If you don't see the SSLIP icon, look for an upward facing arrow and click on that to reveal other icons.

When you have located the SSLIP icon, right-click on it and choose "Shut Down". If prompted to confirm, click "Yes".

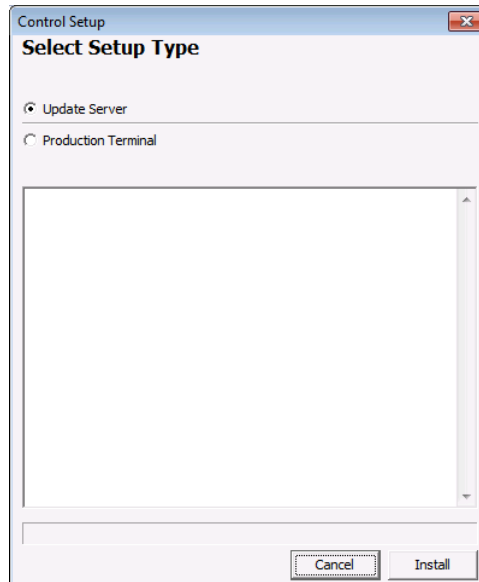
☐	Run the upgrade.
☐	Enter the License Key number when prompted.
☐	Confirm installation prompts when received.

Locate the upgrade file you downloaded earlier. Double-click on it to run it. It may take as long as 20-30 seconds for your computer show a screen. Do not immediately click on the file again as your computer will end up trying to run the upgrade twice. (If this happens, just cancel one when prompted.)

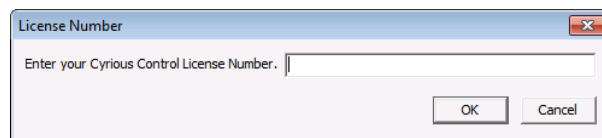
Depending on your computer's security settings, you may be prompted that you are running a program that wants to change files on your computer. Click **Yes** to continue.



Select that you want to update the Server and click **Install**.

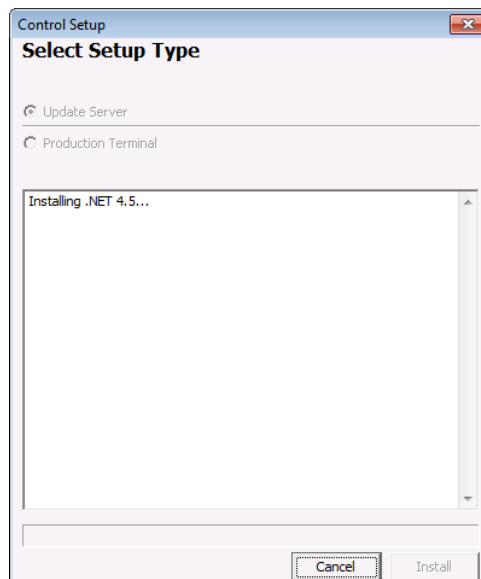


Enter your Cyrious License Key number and click **OK**.

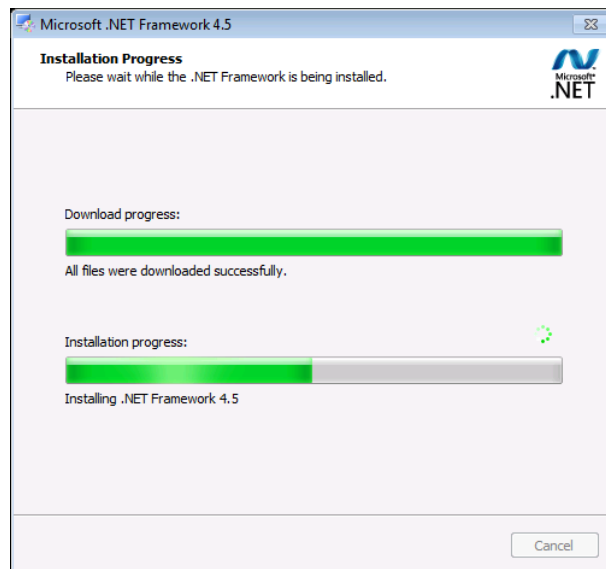


The installer will attempt to validate the key online. If the key is invalid or the server does not have Internet, you will be prompted to re-enter the key or connect to the Internet to continue.

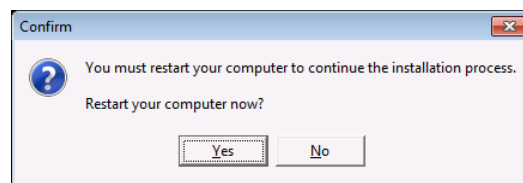
The installer will now check for base libraries and components the server needs. In some cases, many of these will already be on the system and the installer will just skip this step.



The installer may need to run other installation packages. Progress dialogs will be shown where appropriate.

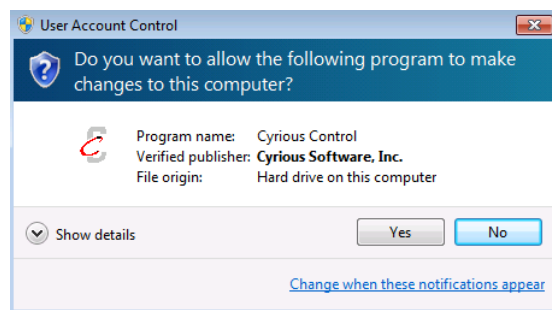


Some components, such as the Microsoft .NET 4.5, require a reboot before continuing. If prompted, click **Yes** to reboot the computer.

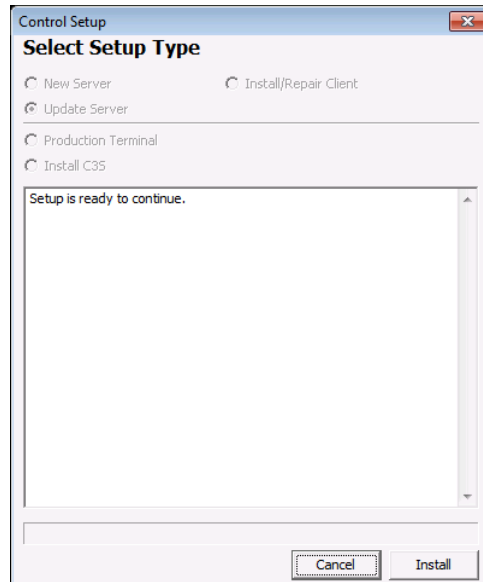


After the reboot (if it is required), wait for 30 seconds. If the SSLIP restarted, close it down by right-clicking on the icon in the system tray as described previously.

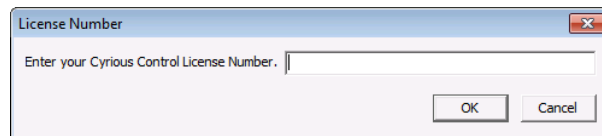
The installer will automatically attempt to run. You will need to click **Yes** to allow it to resume.



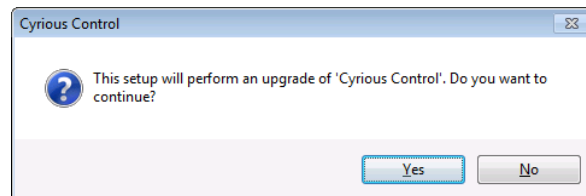
The installer will pick up where it left off. Click **Install** to continue.



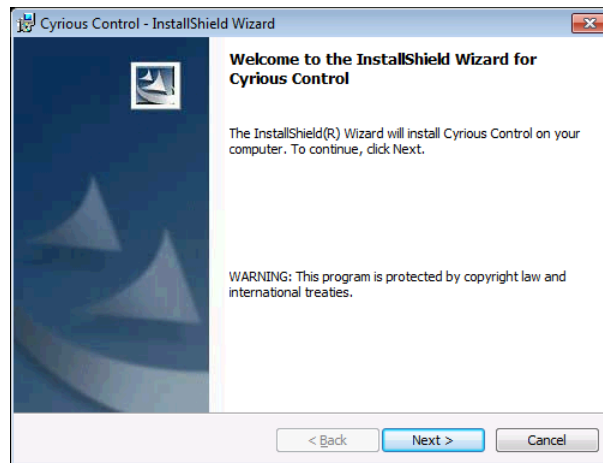
Confirm your Cyrious License Key number (it should be filled in already) and click **OK**.



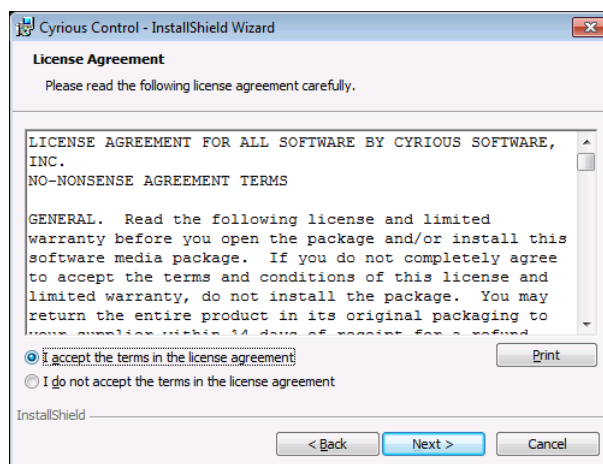
If you are prompted to continue the upgrade of Cyrious Control, click **Yes**.



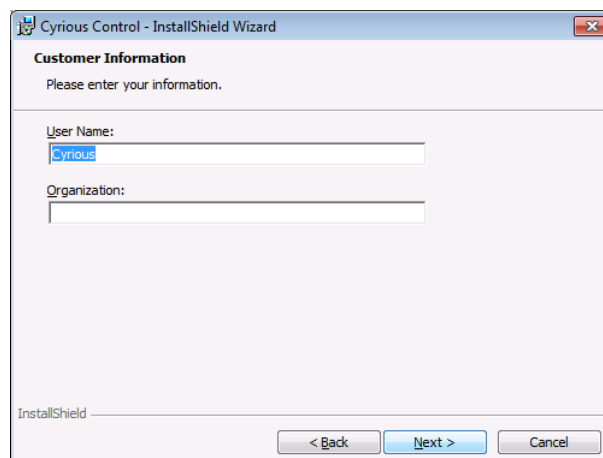
The Cyrious upgrade installer will prompt to update your system. Click **Next** to continue.



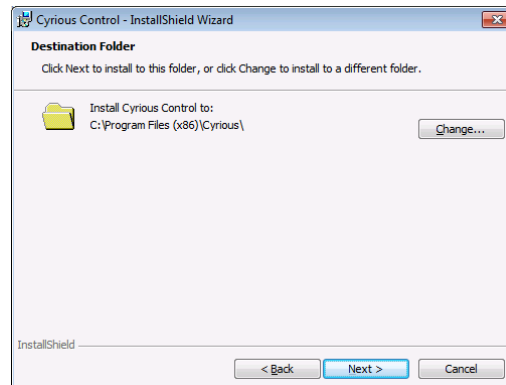
Read the license agreement. Click "I accept" or "I do not accept" the license agreement as appropriate. If you accept the terms, click **Next** to continue. The installer will not proceed without your acceptance.



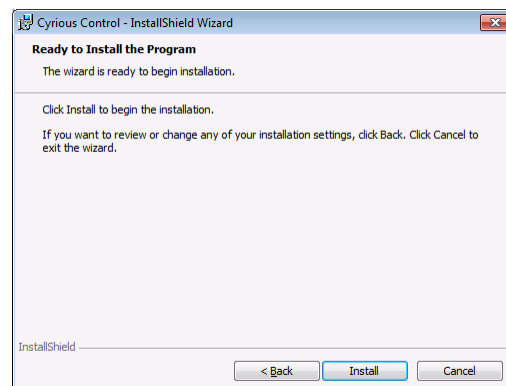
Enter your name and the name of your company, then click **Next**.



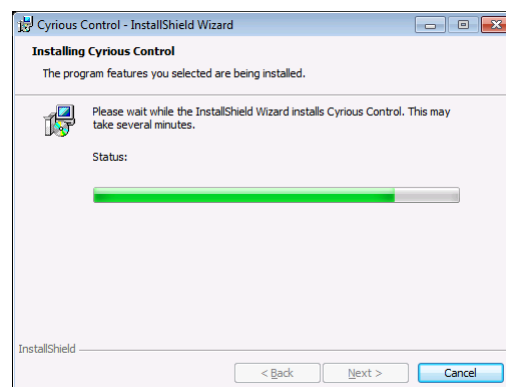
The installer will detect where you previously installed Control. You should not need to change this. Click **Next** to accept the default location and continue.



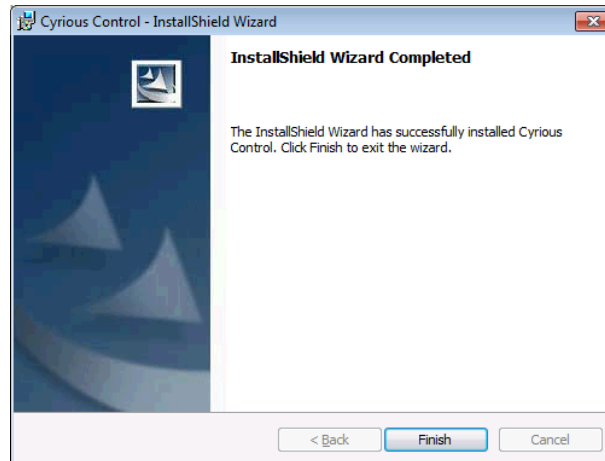
Click **Install** to begin the install.



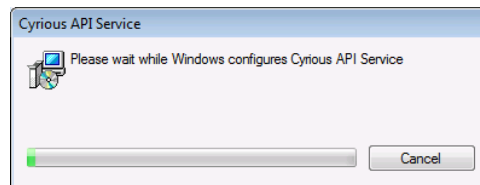
The installer will show the upgrade progress as it works.



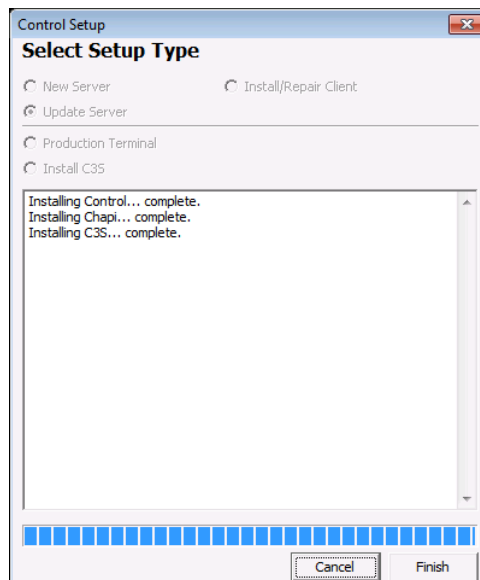
When the upgrade finishes its installation, it will display a confirmation screen. Click **Finish**.



The last step in the upgrade process is to configure the CHAPI and C3S Services. This should take under a minute.



When the configuration is done, you'll see this screen. Click **Finish** to close the installer.



☐	Reboot the server when completed.
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Once the installation is complete, reboot the computer manually if it does not do this automatically. This will ensure that all of the components are installed and started.

E. Confirm the Upgrade

☐	Log in to the server. Check that the SSLIP started up.
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When the server is rebooted post installation, the first thing to confirm is that the SSLIP is starting up. Log in to the server. You should see the SSLIP starting up or it should have started already and be running in the system tray at the bottom right of the screen.

Note: On Windows 8 and Windows 2012 servers, the start-up process may be delayed by as much as 2-3 minutes. This is an intentional design decision Microsoft implemented. Eventually, though, the SSLIP will start up normally and the process can continue.

☐	Run Control on the server. Confirm you are able to connect.
☐	Open Order Explorer. Open, edit, and cancel 2 orders. Confirm there are no errors or price changes.

Once the SSLIP is running, the next step is to run Control on the server and confirm you are able to log in locally.

Once you have logged in, Cyrious recommends the following confirmation checks be performed:

- Open Order Explorer.
- Open a recent order of average complexity.
- Clone the order. There should be no pricing changes or other unexplained changes in a recent order.
- Since there is no need to really save it, cancel the order.
- Open another recent order.
- Click Edit. Again, there should be no unexplained changes.
- Click Save.
- View or print an Invoice for that order.

The Cyrious team has converted scores of databases to ensure there are no unexplained problems in the conversion. This minimal series of checks will just help you confirm there are no unexplained changes introduced by the upgrade.

☐	Run Control on a client. Confirm you are able to connect.
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Now it is time to confirm your client computers can connect. Run Control from one or more clients and confirm you can log in as before.

Congratulations! You have just upgraded to Control 6.0. Give yourself a hand! ☺

If you do have any problems during the upgrade, our technical support staff is available to assist you. You can reach them at 888-552-9823 or by emailing support@cyrious.com.