



Everest Upgrade Guide

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1. PREPARING FOR THE UPGRADE

1.1 CHOICE EVEREST VERSION WHICH YOU WANT TO UPGRADE

We strongly recommend using the latest Everest version which contains the latest bug fixes and enhancements. However, you can look through Everest release notes and choose one of the previous Everest versions which match your requirements.

1.2 WINDOWS SERVER

Install and configure Windows Server. In the release notes you can find the requirements for OS, CPU, RAM, Free Disc Space, MS SQL Server version, etc.

1.3 NEW EVEREST LICENSE

You need to submit a ticket to Everest Support requesting a new Everest license for the version being upgraded to. In the ticket specify the Company name and Everest version. In case if you have more than one Everest company – you also need to specify MAC address of the application server where new Everest version will be installed.

1.4 MS SQL SERVER

Install a version of MS SQL Server that is certified or supported for the version you wish to upgrade to. The SQL Server edition must be Standard or Enterprise. SQL Express is no longer supported.

Run "MS SQL Server XXXX Configuration Manager" On the left panel click on "SQL Server Network Configuration > Protocols for XXX". Enable "TCP/IP" and "Named Pipes" protocols. Click on TCP/IP, go to "IP Addresses" tab, IPxx: Blank "TCP Dynamic Ports", Set TCP Ports=1433

Note: Skip this task if you are performing the upgrade on an existing Everest server.

1.5 CONFIGURE WINDOWS SERVER

Configure the server as follows:

- Control Panel > System and Security > Administrative Tools > Services. Service "KtmRm for Distributed Transaction Coordinator" - set "Startup type" to Automatic
- Control Panel > System and Security > System > Advanced System Settings. Click "Settings" button under "Performance Options" section, go to "Data Execution Prevention" tab. Select the radio button "Turn on DEP for essential Windows programs and services only". Click Apply and Ok buttons
- Control Panel > System and Security > Windows Firewall > Advanced Settings. Create inbound and outbound rules as shown below:
"MS SQL": In / Out, TCP (1433)
"RPC": In / Out, TCP (135)
"DCOM": In / Out, TCP (4000-4020)
- Control Panel > System and Security > Windows Firewall > Allowed apps. Enable COM+ Network Access

- Control Panel > Administrative Tools > Edit group policy. On the left panel go to Computer Configuration > Administrative Templates > System > User Profiles. On the right panel set "Do not forcefully unload the user registry at user logoff" to ENABLED.
- Run Windows Registry editor. Set HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\COM3\RemoteAccessEnabled to 1
- Control Panel > System and Security > Administrative Tools > Components and Services. On the left panel go to Components and Services > Computers > My Computer > right mouse click > Properties. Go to "Default Protocols" tab, select "Connection-oriented TCP/IP", click Properties. Add port ranges 4000-4020. Click OK & OK & Apply & Yes (To accept restarting MS DTC)
- Control Panel > System and Security > Administrative Tools > Components and Services. On the left panel go to Components and Services > Computers > My Computer > right mouse click > Properties. Go to "COM Security" tab. "Edit Limits" and "Edit Defaults" - add Network and Everyone users
- Control Panel > System and Security > Administrative Tools > Components and Services. On the left panel go to Components and Services > Computers > My Computer > Distributed Transaction Coordinator > Local DTC > right mouse click > Properties. Go to "Security" tab, check checkboxes against NetworkDTCAccess, AllowRemote(Clients,Administration), Allow(Inbound,Outbound), NoAuthenticationRequired, EnableXATransactions. Click OK & Yes (To accept restarting MS DTC) & OK
- Restart the server

1.6 BACK UP DATA AND FILES

Take a backup of all Everest company databases into a "Backups" folder e.g. C:\Backups.

Copy the Everest multimedia files into the "Backups" folder.

Copy the encryption key files into the "Backups" folder.

If "Everest ACRM" is installed – make a backup of CRM Studio applications. Go to Everest main menu > CRM > CRM Studio > Architect. On the "Everest CRM Studio Architect" screen go to File > EventPak > Builder and save a backup pack for the required CRM applications into the "Backups" folder.

Copy \Icode\Everest\ACRM\Data\KS_Objects.MDB into the "Backups" folder

Copy the "Icode\Everest\Reports\Reports" folder to the "Backups" folder

Run SQL Server Management Studio, open new SQLQuery window and execute the below sql query

```
SELECT * FROM EVEREST_SYSTEM..COMPANIES where company_code != 'ASC'
```

Copy information returned by the sql query into a txt file.

Back up configuration files for Everest customizations and addons if installed. Usually the configuration file is an .xml file and is located in the same folder where the Everest customization or add-in is installed.

EVEREST REMOVAL

***This task should be performed only when you are upgrading Everest on an existing server.**

Remove Everest customizations and add-ins

Remove the old version of Everest components. Control Panel > Programs > Programs and Features. Remove "Everest eStoreFront" if installed, remove "Everest ACRM" if installed, remove Everest SDK" if installed. Remove "Everest Server" and "Everest Client".

Run SQL Server Management Studio, remove all Everest company databases, EVEREST_SAMPLE and EVEREST_SYSTEM databases

Remove Icode\Everest\ folder with all subfolders

2. EVEREST INSTALLATION AND INITIAL CONFIGURATION

2.1 EVEREST INSTALLATION

Download an archive with required Everest version from the release portal. Unpack the archive.

Make sure that you are logged in as a user with administrator permissions.

Run setup.exe, select "Client and Server" option.

For the server install dialog follow the next options:

"Choose Setup Type" – "Typical"

"Everest Application Server Configuration" – "Specified User (Recommended)" and type user name/password of local Windows user which is a member of the Administrator group. It is recommended to create a separate user.

"MS SQL Server Connectivity"- specify server name where MS SQL server is running and password for sa user

"Ready to install Everest Advance Edition XXX (server)" – press Install and wait for it to finish.

For the client install dialog follow the next options:

"Choose Setup Type" – "Complete" (unless you want to exclude some particular components)

"Ready to install Everest Advance Edition XXX (client)" – press Install and wait for it to finish.

2.2 FIRST RUN

Run Everest Client application as administrator, in the "Everest login" screen set user=SUP, password=SUPER, click "Options" button, set "Application server name"= the name of the Windows server where Everest application server is installed, "Database server name"= the name of the Windows server where Everest Database server is installed, "Company Code"="ASC", click OK.

You will be prompted to create a new user, follow the instructions on the corresponding screen. You will need to specify your e-mail and mail server to receive the validation code. In case if you don't have the smtp server you can use one of the programs which emulate mail servers like Papercut, Smtplib4Dev, FakeSMTP, etc. Once the new user is created - log into Everest.

2.3 EVEREST COMPANY DB CREATION

Go to the Everest main menu > File > New Company

Make sure Application Server and Data Server are correct, click "Next" until "Company Information - Name". Enter the Everest company code and the legal name based on the

information from the text file created at the step *“Back up data and files”*, click "Create" and "OK". Go to "Company Information - Address" - specify all mandatory fields, click "Done" and "OK". Go to "Accounting - Currency Information" - select the currency from the list, click "Done" and "OK". Go to "Accounting - Chart of Accounts" - select "Creating your own COA", click "Done" and "Yes" to confirm own COA creation. Let the process complete.

This will create DB and log files in the Everest data folder `\Icode\Everest\Data\`

Note: you need to repeat the above steps with "Everest Company DB Creation" for all other Everest companies that you have (see the text file created at the step *“Back up data and files”*).

2.4 RESTORE DB COMPANY BACKUPS

Once all company DBs are created it is required to overwrite dummy database files created above with actual company data from the backups.

Use DB backups created at the step *“Back up data and files”* if you are upgrading Everest on the exiting server.

Repeat the below steps for all your Everest company DBs from the text file created at the step *“Back up data and files”*.

Run SQL Server Management Studio, select the name of the DB > right mouse click > Tasks > Restore > Database, then select the location to the corresponding BAK file.

Go to Files option, check that the DB data file (MDF) and the DB log file (LDF) will go to `Icode\Everest\Data\CompanyName\` folder. If it is not so - adjust the locations.

Sometimes there may be a couple of DB log files (LDF) for an Everest company DB. Such an issue usually happens when you upgrade old Everest versions. In this case you need to delete the secondary log file(s) and leave only the main log file. If you don't do this – there will be issues with the DB upgrade tool described in the next section. The secondary DB log file(s) is much smaller than the main DB log file.

Go to Options option, tick the "Overwrite" and "Close Existing connection" check-boxes. Click "OK" to start the DB restore.

2.5 EVEREST COMPANY DB UPDATE

Repeat the below steps for all your Everest company DBs from the text file created at the step *“Back up data and files”*. In the case when you have multiple Everest DB companies, for the first upgrade you should select the main company DB.

Run DB upgrade routine `DatabaseUpdateUtility.exe` from `Icode\Everest\Client\Utilities\` folder. Welcome screen, click "Next" button, enter database server name, select company from the drop-down list, enter an Everest supervisor user name and password, enter maintenance key from the generated license provided by Everest Support, click "Next", say "No" to an additional

backup and accept all other options.

Depending on the DB size and system performance, the process can take from 30 min to a couple of hours.

3. POST UPGRADE

3.1 ADJUST EVEREST COMPANY DATABASES

To fix possible data issues run SQL Server Management Studio and execute the below sql code for each Everest company DB:

```

if object_id(N'dbo.VVXxxLen', N'FN') is not null drop function dbo.VVXxxLen
go
create function dbo.VVXxxLen(@strTable nvarchar(50), @strCol nvarchar(50))
    returns varchar(max)
as
begin
    return (SELECT CHARACTER_MAXIMUM_LENGTH FROM INFORMATION_SCHEMA.COLUMNS
        WHERE TABLE_NAME=@strTable AND COLUMN_NAME=@strCol)
end
go

declare @nCount int
declare @strStatus varchar(50)
raiserror('Correcting ...',0,0) with nowait

declare @nItems int = (SELECT count(*) FROM CCARDS)
declare @nNullItems int = (SELECT count(*) FROM CCARDS WHERE MASKED IS NULL)
set @nItems = (SELECT count(*) FROM CCARDS)
set @nNullItems = (SELECT count(*) FROM CCARDS WHERE MASKED IS NULL)
if @nNullItems > 0
    set @strStatus = '*** Converting: ' + convert(varchar,@nNullItems) + ' ***'
else
    set @strStatus = 'OK'
raiserror('  CCARDS MASKED=NULL. Total Cards: %d. Masked=NULL: %d. %s',
    0,0,@nItems,@nNullItems,@strStatus) with nowait
set nocount on
if @nNullItems > 0 begin
    UPDATE CCARDS SET MASKED = '' WHERE MASKED IS NULL
    set @nCount = @@rowcount
    if @nCount != @nNullItems
        raiserror(' => ERROR: Expected %d. Updated %d',0,0,@nNullItems,@nCount) with nowait
end

```

```

set @nItems = (SELECT count(*) FROM WEB_PAYMENTS)
if exists(SELECT * FROM SYS.COLUMNS
    WHERE NAME = N'MASKED' AND OBJECT_ID = OBJECT_ID(N'WEB_PAYMENTS'))
    set @nNullItems = (SELECT count(*) FROM WEB_PAYMENTS WHERE MASKED IS NULL)
else
    set @nNullItems = 0
if @nNullItems > 0
    set @strStatus = '*** Converting: ' + convert(varchar,@nNullItems) + ' ***'
else
    set @strStatus = 'OK'
raiserror(' WEB_PAYMENTS MASKED=NULL. Total Payments: %d. Masked=NULL: %d. %s',
    0,0,@nItems,@nNullItems,@strStatus) with nowait
if @nNullItems > 0 begin
    UPDATE WEB_PAYMENTS SET MASKED = '' WHERE MASKED IS NULL
    set @nCount = @@rowcount
    if @nCount != @nNullItems
        raiserror(' => ERROR: Expected %d. Updated %d',0,0,@nNullItems,@nCount) with nowait
    end
set nocount off

declare @nTranCurrent int, @nTranMax int
set @nTranCurrent = (SELECT ident_current('TRANHIST'))
set @nTranMax = (SELECT max(TRANHIST_ID) FROM TRANHIST)
if @nTranMax > @nTranCurrent
    set @strStatus = '*** Reseeding to: ' + convert(varchar,@nTranMax) + ' ***'
else
    set @strStatus = 'OK'
raiserror(' TRANHIST. Current ID: %d. Maximum ID: %d. %s',
    0,0,@nTranCurrent,@nTranMax,@strStatus) with nowait
if @nTranMax > @nTranCurrent
    DBCC CHECKIDENT (TRANHIST, RESEED)

declare @strNow as varchar(4) = convert(varchar,getdate(),12)
declare @nCcards int, @nActCcards int, @nOldCcards int
declare @nMaxCcards int = 30000
set @nCcards = (SELECT count(*) FROM CCARDS)
set @nOldCcards = (SELECT count(*) FROM CCARDS
    WHERE substring(EXP_DATE,3,2) + substring(EXP_DATE,1,2) < @strNow)
set @nActCcards = @nCcards - @nOldCcards

```

```

if @nActCcards > @nMaxCcards
    set @strStatus = '*** Too many active cards. KeyMgmt may fail ***'
else if @nCcards > @nMaxCcards
    set @strStatus = '*** Please delete old cards. KeyMgmt may fail ***'
else
    set @strStatus = 'OK'
raiserror(' Expired CCARDS. Current date: %s. Total: %d. Active %d. Expired: %d. %s',
    0,0,@strNow,@nCcards,@nActCcards,@nOldCcards,@strStatus) with nowait

declare @nEv1Event varchar(50), @nEv1Message varchar(50), @nPhPassword varchar(50)
set @nEv1Event = dbo.VVXxxLen('event_log','event_message')
set @nEv1Message = dbo.VVXxxLen('event_log','error_message')
set @nPhPassword = dbo.VVXxxLen('passwordhistory','password')
if (@nEv1Event > 0 and @nEv1Event < 10) or
    (@nEv1Message > 0 and @nEv1Message < 10) begin
    ALTER TABLE EVENT_LOG ALTER COLUMN EVENT_MESSAGE NCHAR(255)
    ALTER TABLE EVENT_LOG ALTER COLUMN ERROR_MESSAGE NCHAR(255)
    set @strStatus = '*** Column widths adjusted ***'
end
else
    set @strStatus = 'OK'
raiserror(' EVENT_LOG. %s',0,0,@strStatus) with nowait
if (@nPhPassword > 0 and @nPhPassword < 10) begin
    ALTER TABLE PASSWORDHISTORY ALTER COLUMN PASSWORD NVARCHAR(100)
    set @strStatus = '*** Column widths adjusted ***'
end
else
    set @strStatus = 'OK'
raiserror(' PASSWORDHISTORY. %s',0,0,@strStatus) with nowait

if object_id(N'dbo.VVXxxLen', N'FN') is not null drop function dbo.VVXxxLen
UPDATE PERSONAL SET EMAIL = 'default@default.com' WHERE EMAIL IS NULL
raiserror(' Emails updated %d',0,0,@@rowcount) with nowait
DELETE FROM EVEREST_SYSTEM..EVEREST_SPM
raiserror(' EVEREST_SPM deleted %d',0,0,@@rowcount) with nowait
DELETE FROM SEMAPHOR
raiserror(' SEMAPHOR deleted %d',0,0,@@rowcount) with nowait

```

3.2 FIX EVEREST USERS SECURITY RIGHTS

Go to Everest main menu > File > Setup > Users > Users belonging to group - add all users to EVERYONE.

Go to Everest main menu > File > Setup > Security Rights – grant the next security rights to EVERYONE : 701 ("SYSTEM: EXIT"), 10567 ("FLOW CONTROL: SET OTHER PREFERENCES"), 11609 ("SYSTEM: CHANGE LOCATION")

3.3 EVEREST MULTIMEDIA FILES

Create folder \icode\Everest\Multimedia, share it as "\\SERVER_NAME\Multimedia" for Everyone. Copy multimedia files from the “Backups” folder created at the step “*Back up data and files*” into \icode\Everest\Multimedia folder

3.4 EVEREST CUSTOM REPORTS

Copy report files from the “Backups” folder created at the step “*Back up data and files*” into \icode\Everest\Reports\Reports folder. You will see a prompt “The destination has XX files with the same name” – select the option “Skip these files”

Run SQL Server Management Studio and execute the below sql query against each Everest company DB:

```
select report_path
from reports
where report_code>224
```

If the query returns data – it is required to update the report path to point to the new Everest server. As one of the possible solutions you can use the below sql statement; just replace servers details which are in square brackets:

```
update reports
set report_path = replace(report_path, '[old server name]', '[new server name]')
where report_code>224
```

The final result should be that all reports with the code greater than 224 should point to the new Everest server.

3.5 REPOSITORIES

Go to Everest main menu > Setup > Preferences > Defaults > All.

On the left panel click “Reporting Preferences” button, go to “Export Settings” and update “Global Reports Repository” to \\SERVER_NAME\REPORTS

On the left panel click “Other Defaults” and update “Global Multimedia Repository” to \\SERVER_NAME\Multimedia

3.6 ENCRYPTION KEYS FILE(S)

Create folder \Icode\Everest\EncryptionKeys, share it as "\\SERVER_NAME\EncryptionKeys" for Everyone. Copy encryption key files from the “Backups” folder created at the step “*Back up data and files*” into this shared folder.

Run the key management program KeyMgmt.exe located in “\Icode\Everest\Data\CCard keymgmt”. Specify server name, user and password to connect to the Everest DB server, press OK button.

In the “Security Key Change” screen select the Everest company code from the drop-down list, change the path to point to the new shared folder and generate new key file.

Repeat this action for your all Everest companies.

4. ISSUES WITH THE OLD EVEREST VERSIONS

In case of an from Everest version 4x or 5x - you will need to set up a staging server and repeat the upgrade steps several times.

If upgrading from Everest 4x then it is required to upgrade Everest DBs from version 4 to version 5:

- Set up Windows server Win2003R2 with MS SQL Server 2005
- Request Everest license for version 5
- Perform the upgrade to version 5 using the above instruction.

If upgrading from Everest 5x then it is required to upgrade Everest DBs from version 5 to version 6:

- Set up Windows server Win2008R2 with MS SQL Server 2008R2
- Request Everest license for version 6
- Perform the upgrade to version 6 using the above instruction.