



Upgrade Instructions: Client-Hosted Database

EnergyCAP® Enterprise 6.2

These instructions are for upgrading from EnergyCAP Enterprise Release 6.1 to Enterprise Release 6.2 with a client-hosted database.

Note: If you are upgrading from an EnergyCAP release other than Release 6.1, contact [EnergyCAP support](#) for upgrade assistance. If you are not certain which Release is currently installed on your system, login to EnergyCAP and click **Help > About**.

The new release is 6.2.64.xxx, where 64 is the database version and xxx represents the current build number (100 or higher).

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Overview

EnergyCAP Enterprise Release 6.2 installation is simple and quick.

Here is an overview of the upgrade process:

1. Download the EnergyCAP Setup files (see [Appendix A](#)).
2. Back up your current EnergyCAP database to a safe archive location and then execute the SQL script database upgrade per instructions.
3. Execute the Setup file to install EnergyCAP Release 6.2 on each workstation.
4. Use one workstation to perform Post-Installation Actions:
 - Update Audits
 - Update Reports

Follow all of the steps indicated below for each process. Some steps may require IT assistance.

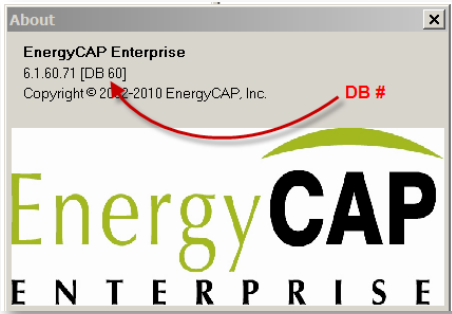
Database Upgrade Prerequisites

1. Database Backup: Before updating your EnergyCAP database, back up the database to a secure location.

Caution: Failure to properly back up your database before upgrading is not covered by normal technical support. If an upgrade fails and you cannot restore a current backup, there will be an hourly expense charge for any support requests for database repair associated with the upgrade.
2. SQL Server 2005 or greater: EnergyCAP no longer supports SQL Server 2000. The database must be upgraded to at least SQL Server 2005, SP1.

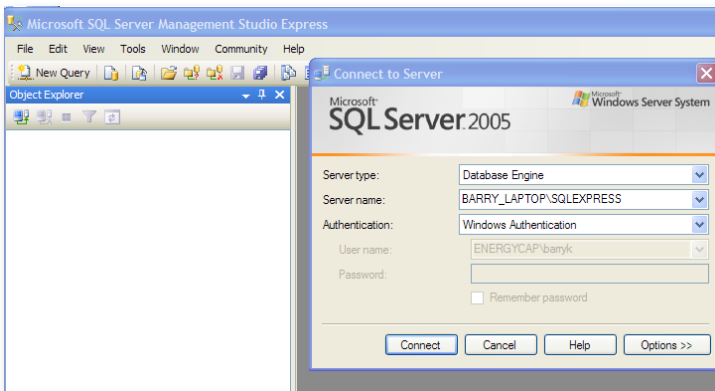
Database Upgrade Procedure

1. In your current version of EnergyCAP, close any open bill entry batches and export any bills awaiting export.
2. Verify your current DB version # (**Help > About** in EnergyCAP Enterprise).
3. Download all required installation files, including the SQL upgrade script, per the instructions in [Appendix A](#). The required script file is named upgrade60to64.sql. You will be upgrading to the latest database version, which is 64.
4. All users should exit EnergyCAP. Back up your current database and label it appropriately.
5. Run the appropriate database upgrade script(s) on your database in sequence from your current DB number to the latest DB number using the SQL Server Management Studio. Script filenames indicate the relevant database version. This process will usually take from one to ten minutes, depending upon database size.



The script database update procedure is outlined in the example below:

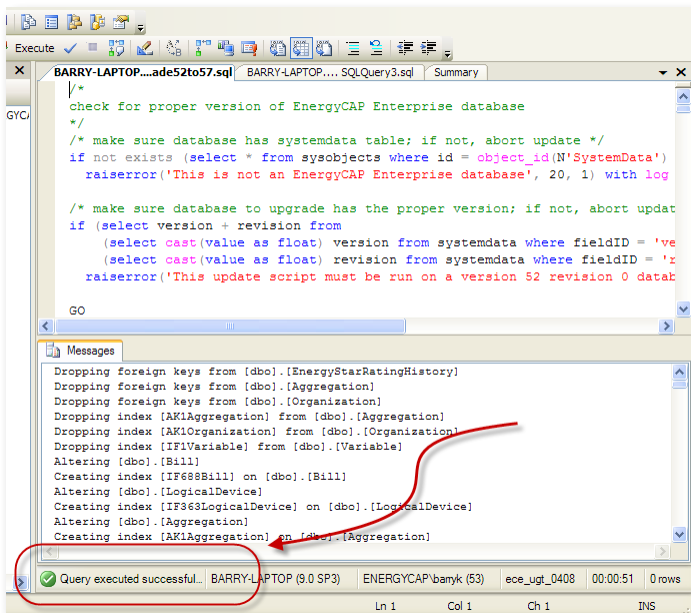
- a. Open the SQL Server Management Studio or other SQL database tool.



- b. Connect to your database via the appropriate Server and Authentication.

Note: The user must be a member of the “sysadmin” group to perform the upgrade. The default EnergyCAP user, “esuser”, does not have this level of permission and will not be able to successfully upgrade the DB.

- c. Select the EnergyCAP database and run required script. Procedures may vary slightly depending on your database administration tool.



Note: A number of SQL messages during the upgrade process are normal and anticipated. EnergyCAP strongly recommends retaining a copy of any SQL messages received in case diagnostics or technical support become necessary.

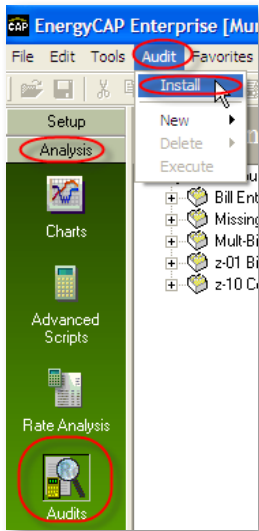
If the message says, “Query executed successfully,” then the database upgrade was successful. If the message says the query was completed with errors, you must restore your backup copy of the database and [contact Technical Support](#) for further assistance.

EnergyCAP Enterprise Installation Procedure

After upgrading your database, install the new EnergyCAP software application on user workstations using the Setup file provided:

1. If you have not already done so, download all required installation files and installation instructions per the instructions in [Appendix A](#).
2. Double-click the Setup file to run the installation.
3. Follow the installation wizard prompts to complete the installation.
 - a. You can install Release 6.2 in the same program folder as your previous 6.1 release (recommended).
 - b. Accept setup default options. The database engine option should remain unchecked.
 - c. Click **Finish...** You will receive a prompt to reboot your system when done. Click **OK** to restart the computer.
4. After your PC has finished rebooting, launch EnergyCAP.
5. Login via your usual procedure. The new EnergyCAP release should load normally.
6. Click **Help > About** to verify that you are using the most current release. The version number of EnergyCAP 6.2 is 6.2.dd.xxx, where dd is the database version number and xxx is the number of the current build.

This concludes the EnergyCAP installation procedure.



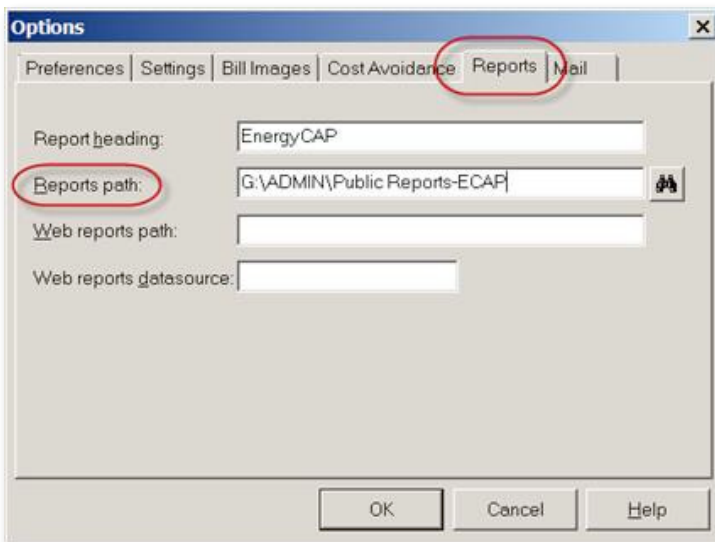
Post-Installation Actions

These Post-Installation Actions perform various database maintenance tasks and must be completed once from one workstation by a user with “admin” user rights in EnergyCAP. There is no need to perform these tasks from each workstation.

1. Audit Updates: Update your audits using this procedure.
 - a. Launch EnergyCAP and click **Analysis > Audits**. The Audit Manager will be displayed.
 - b. Click **Audit > Install**.
 - c. The **Install Auditors** window will open. Click **OK**.

2. Report Updates: Reports are updated by downloading the latest EnergyCAP report files (Crystal Reports .RPT files) from the EnergyCAP website and installing them into the user report folder(s). Update EnergyCAP reports per the procedures below:

Note: The report update process will vary from organization to organization depending on how reports are managed internally. The procedure below will update all reports for all users who share report files on a common network drive. Individual users who wish to maintain private reports on their local hard drive will need to update their workstation using a similar procedure. The individual user’s report path can be specified from the *Report Manager* (**Tools > Options - This Manager**).



- a. Determine the final location(s) for the downloaded report files. To view the global report default location settings in EnergyCAP, click **Tools > Options - Global**. The Options window will open. Then click the **Reports tab** to display the current Reports path.

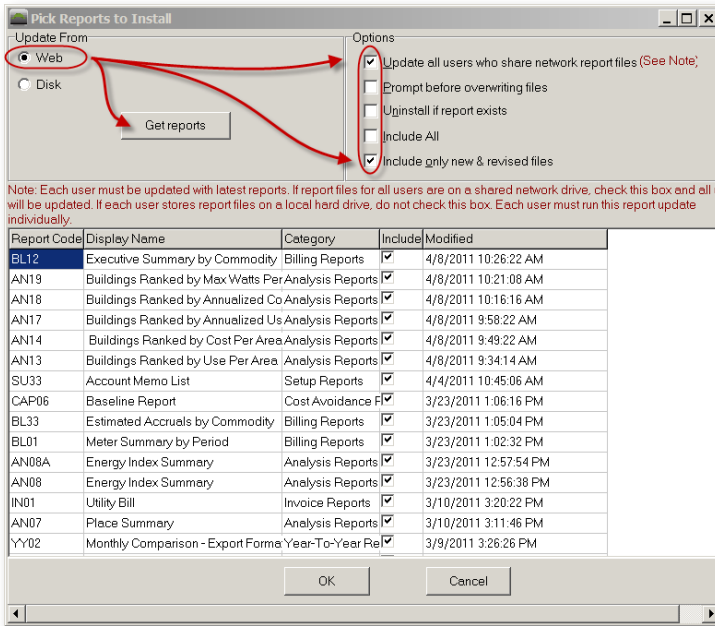
- b. To download and install the reports in EnergyCAP, navigate to the *Report Manager* (**Reporting > Reports**).

Note: If the Reports icon is not among the available options under the **Reporting** menu bar, you may be connected to the database via an internet connection. You must connect to the database via a LAN connection in order to update reports.

- c. Click **Update Reports shortcut** button from the *Report Manager*. The **Pick Reports to Install** window will open.

Note: You may have to resize the **Pick Reports...** window to view all window options.

- d. Select the **Update from Web** radio button; then click the **Get Reports** button.



e. Wait for file download—it may take a few minutes. When ready, the **Pick Reports to Install** window will be populated with report names.

f. Ensure that checkbox settings for **Options** match those on the image above (check the **Update all users... check** checkbox and the **Include only new & revised files** checkbox).

Notes: If you fail to check the **Update all users... check** checkbox during the initial report update, it will be necessary to update reports for each EnergyCAP user individually.

Reports are listed in order by Modified date, latest at the top. The report list will automatically default to include only reports that are new or have been revised since the last report update.

- g. Click **OK** to begin the report installation process. New and updated report RPT files will be installed into the directory specified in the Reports Path and the reports will be registered in the database for designated user(s). Report stored procedures will be updated in the database.

Note: This process may take a long time if you have many users to update.

- h. When the report update is complete, click **Close** to close the **Log** window.

Reminder: If all users are accessing the same common Reports Path on a shared network folder, no further action is required (assuming that reports were installed with the Update all users check option). However, if any users access reports from a Reports folder on their local hard drive, the reports installation must be repeated on these individual user workstations, leaving the **Update all users...** checkbox unchecked.

Note: Reports are updated monthly. To keep up to date on what reports have been modified from month to month, please see the online list at www.EnergyCAP.com/reportupdates.

Congratulations! You have completed the installation. Please read the **Release Notes** (available in the Setup file download directory—see [Appendix A](#)) to familiarize yourself with the changes.

Appendix A: File Download Procedure

1. Open your web browser and navigate to www.EnergyCAP.com/showdownloads.asp.

2. Input the Username and Password indicated below in the fields provided.

Username: energycap62

Password: upgradeto62

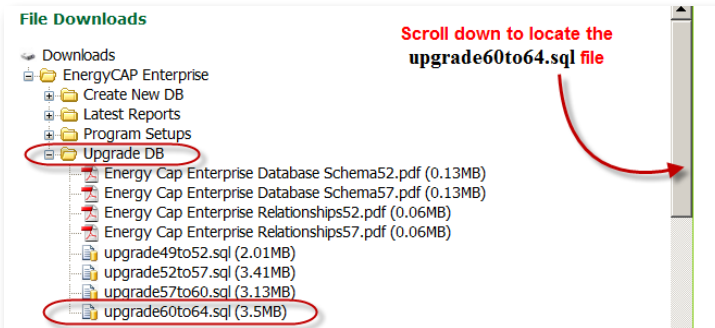
3. Click **Login**. The EnergyCAP Enterprise Program Setups download folder list will become visible.



4. Expand the **EnergyCAP Enterprise Program Setups** download folder list by clicking the 'plus' (+) sign.

5. Expand the Release 6.2 folder and click to select the executable file (ece_setup6-2-64-xx.exe). The XX should be 100 or greater. The **File Downloads** window will open.

6. Click the **Save** button and choose a location on your hard drive to save the installation file.



7. Navigate to the Upgrade DB folder.

8. Locate the upgrade60to64.sql file icon/link.

9. Click the icon next to upgrade60to64.sql to open the dialog box.

10. Select **Save File**, then click **OK** to download the database upgrade script.

