

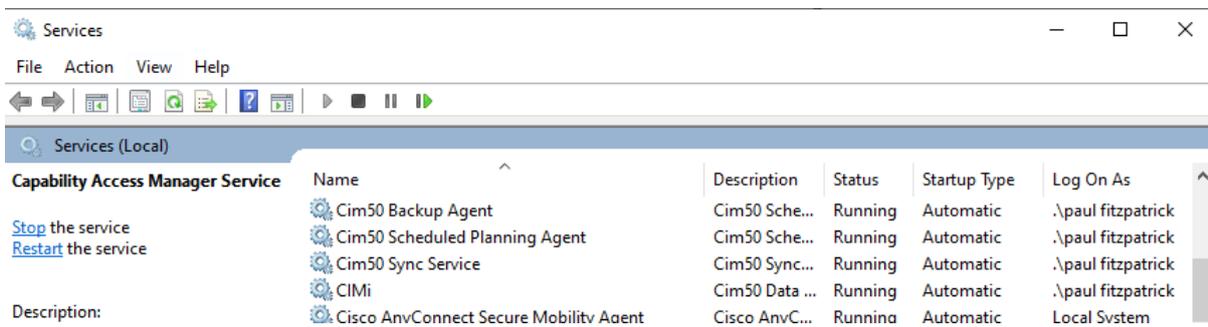
Cim50 v2024

Installing/Upgrading Cim50

This guide assumes Sage50c v29.2 has been installed and licenced on each machine

If you are upgrading from from Cim50 v2020.1 or earlier, please contact your support team as a new licence will need to be issued.

When upgrading please do not continue until you know the domian, username and password that the 4 Cim50 services are running as. The username and domain currently being used can be obtained from "Log On As" within Services on the Cim50 server



Step 1: Install and Upgrade (Server and Client)

Ensure you are logged onto the machine as a local administrator. From file explorer browse to and right click on the Cim50 installation file Cim50.exe and select Run As Administrator. This will load the Cim50 setup wizard.

Server:

If upgrading please log onto the server as the same user that is running the 4 services (Obtained above) before starting the upgrade.

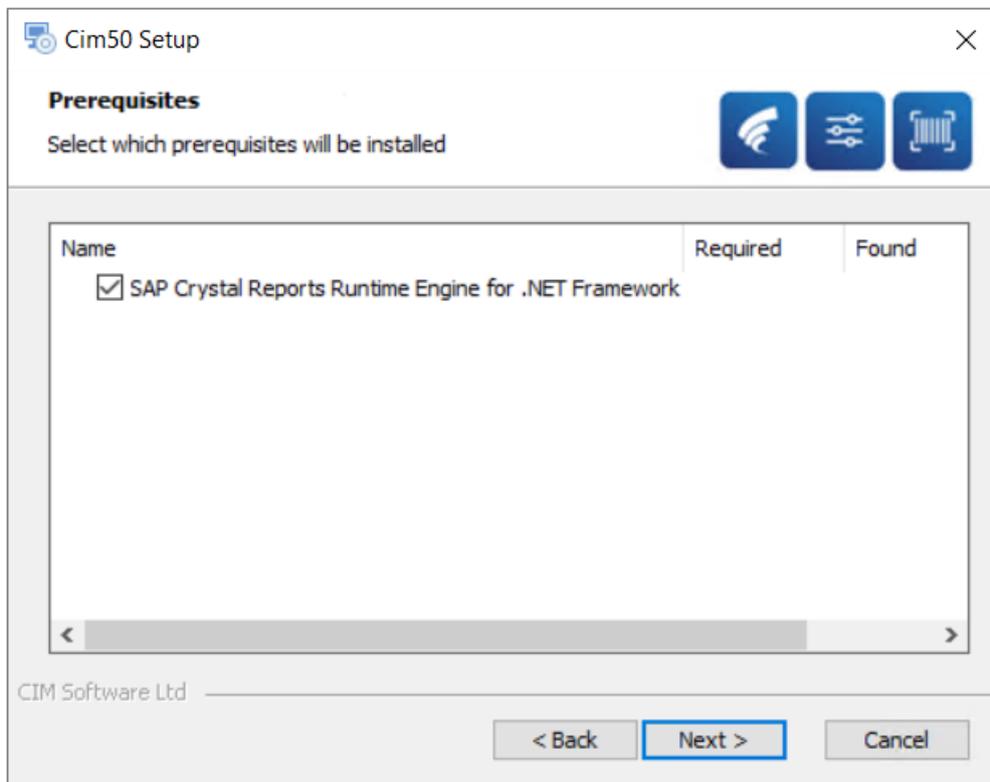
Client:

Please ensure the time on the client machine must match the server time.

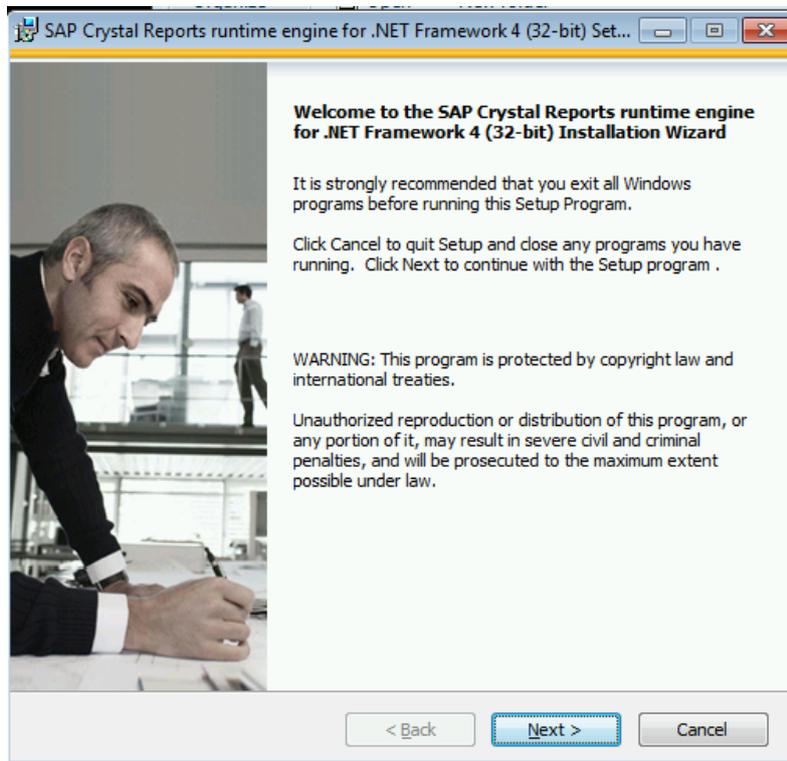
Please note: If you are installing an upgrade to Cim50 the prerequisites will not appear and you will be taken straight to the Cim50 install wizard (Step 2 – Page 6)



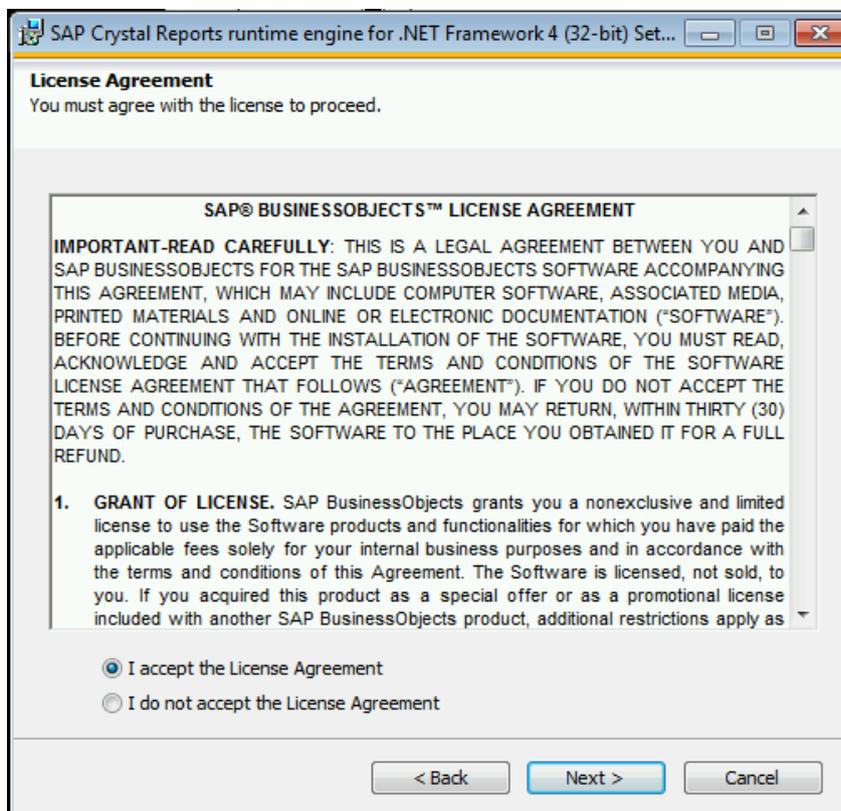
Click Next to install the Cim50 prerequisites – Please note this will only pop up for new client installs. If Cim50 is installed the setup wizard will go to the “Welcome to Cim50 setup wizard” window. See Step 2 page 6



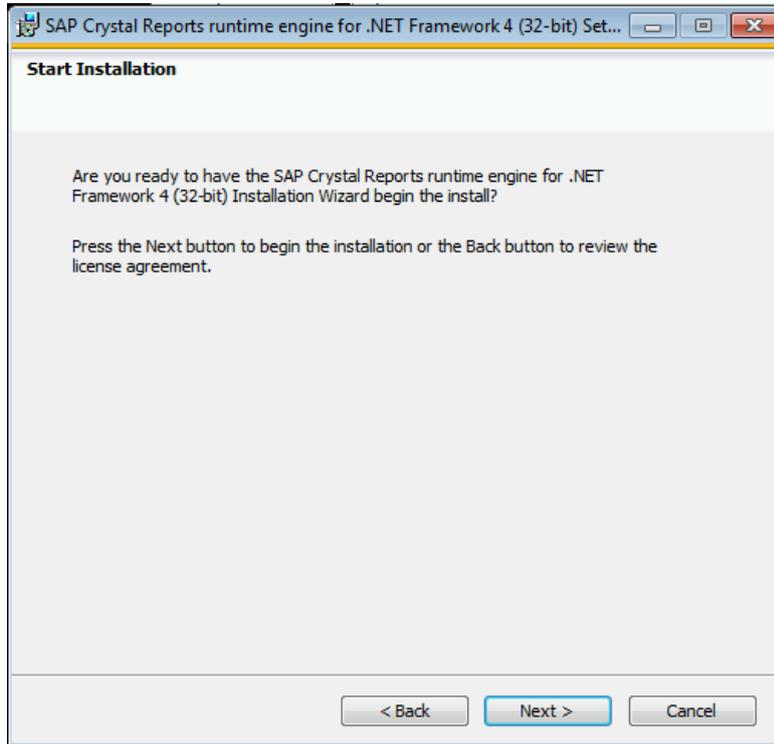
If the machine already has the Crystal Reports runtime installed, you can untick this option. If you are not sure leave it ticked and the wizard will install it if required.



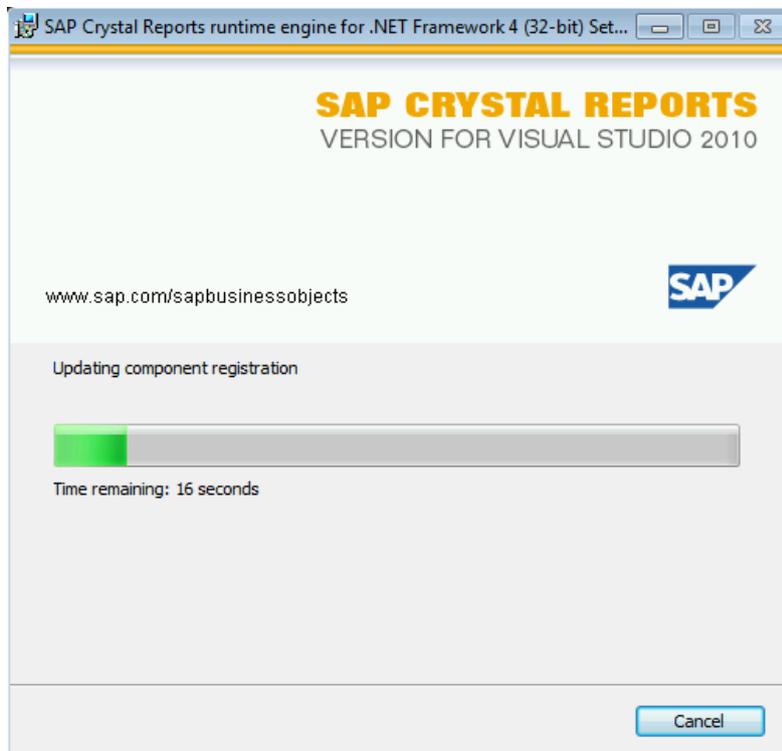
Click Next



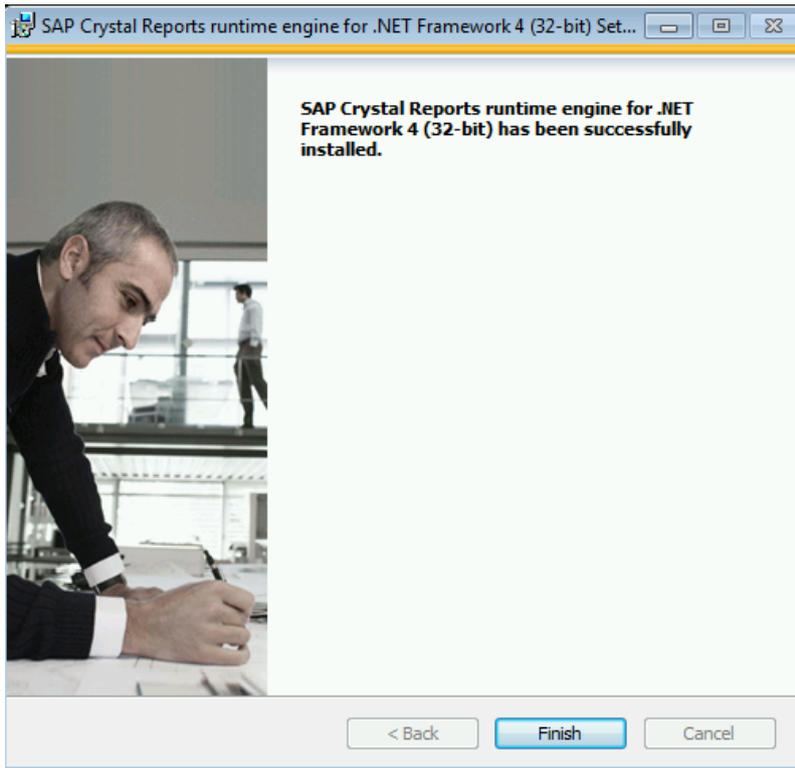
Accept the license agreement and click Next



Click Next

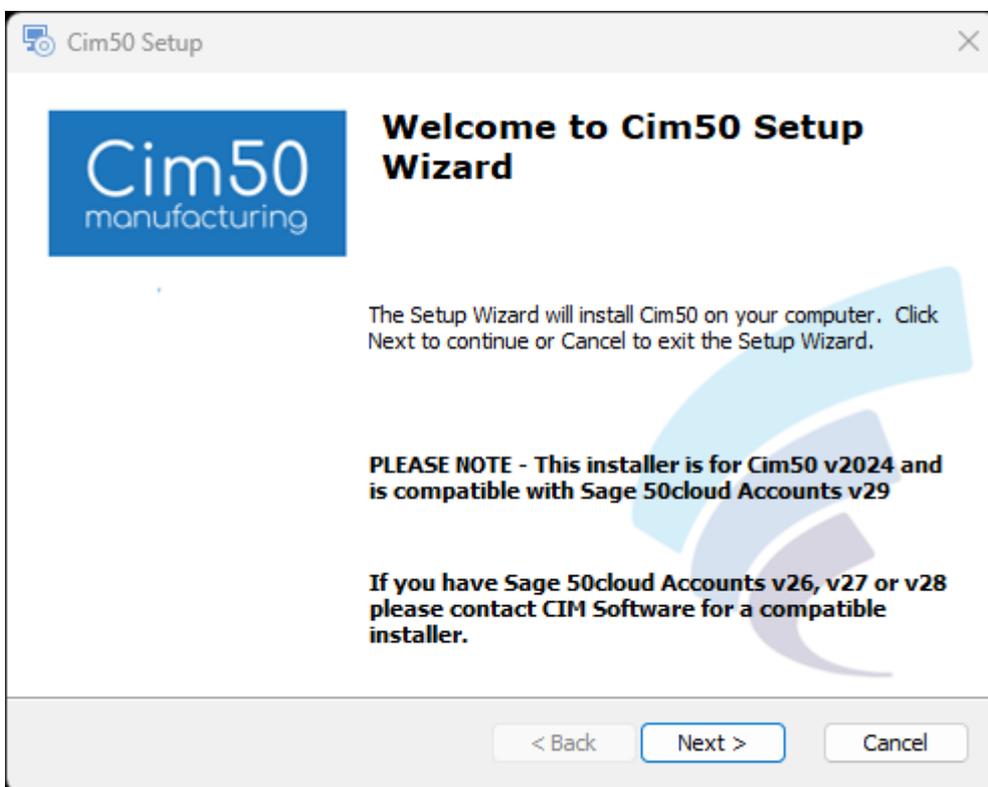


Let the prerequisites installation run through



Once the prerequisites have installed, click Finish to take you back to the Cim50 installation wizard (See step 2)

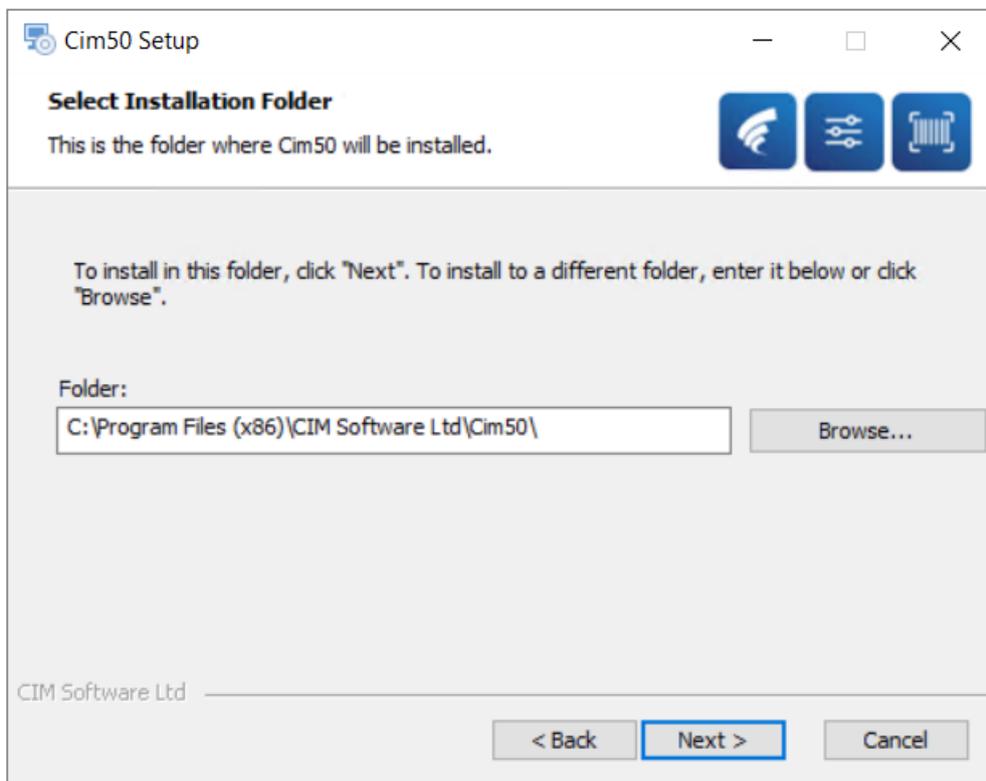
Step 2:



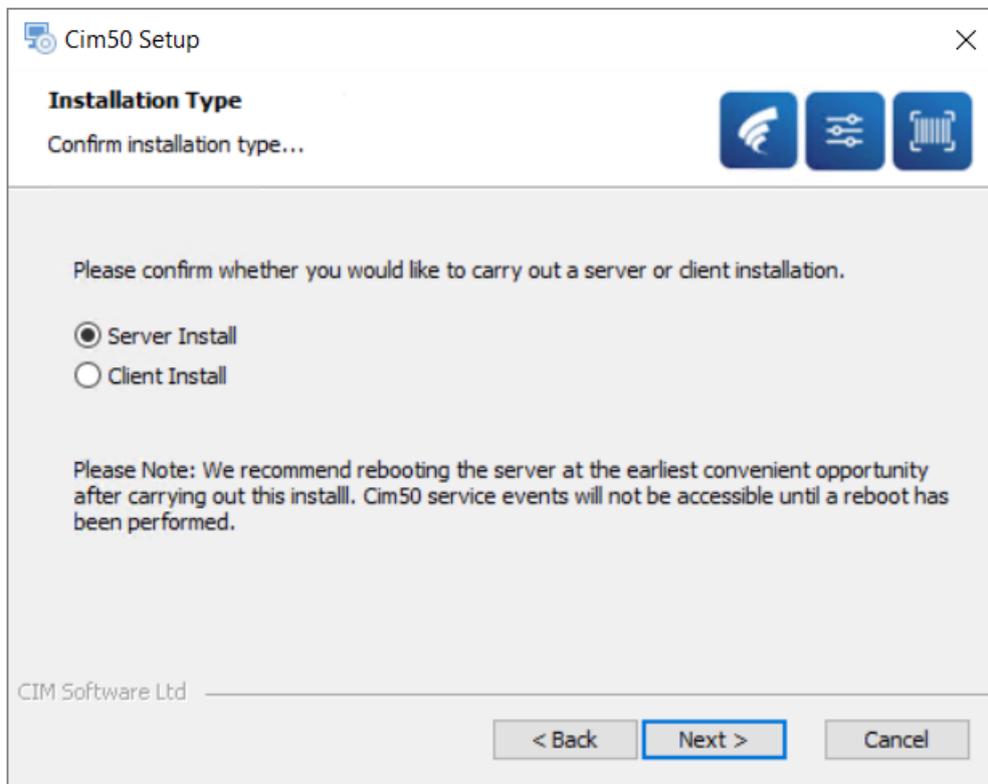
Click Next



Accept the licence and click Next



Click Next

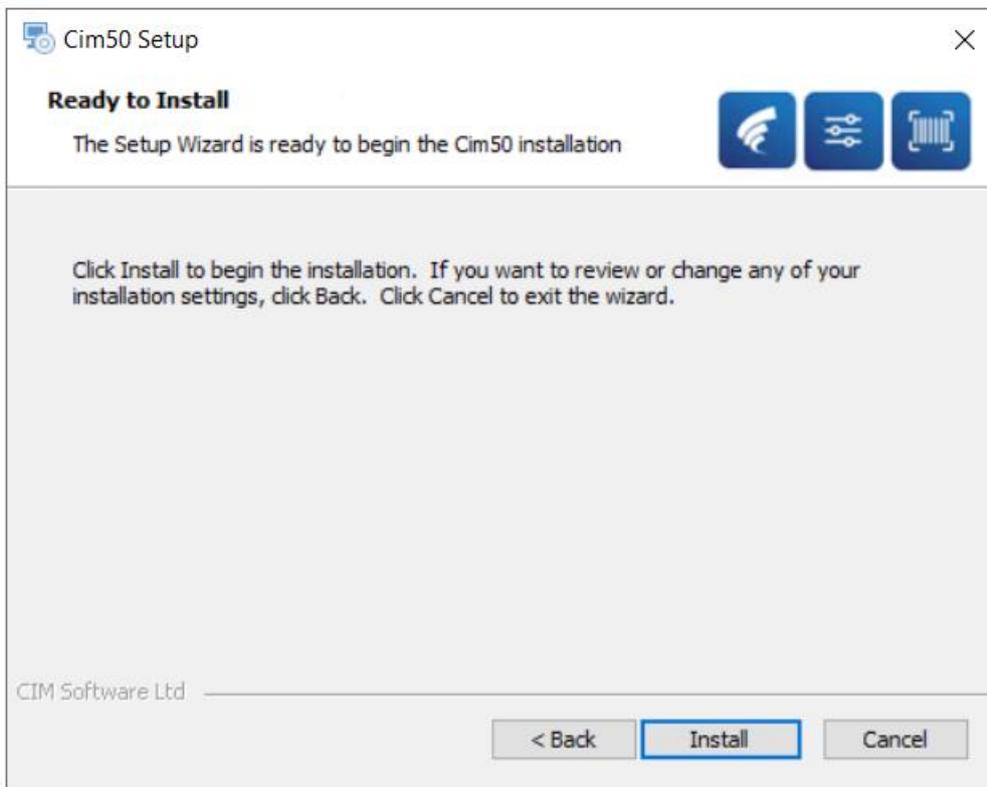


You now need to define if this is a Server install/upgrade or client install/upgrade. If installing on the Cim50 server, please go to step 4. If installing on a client, please go to step 3

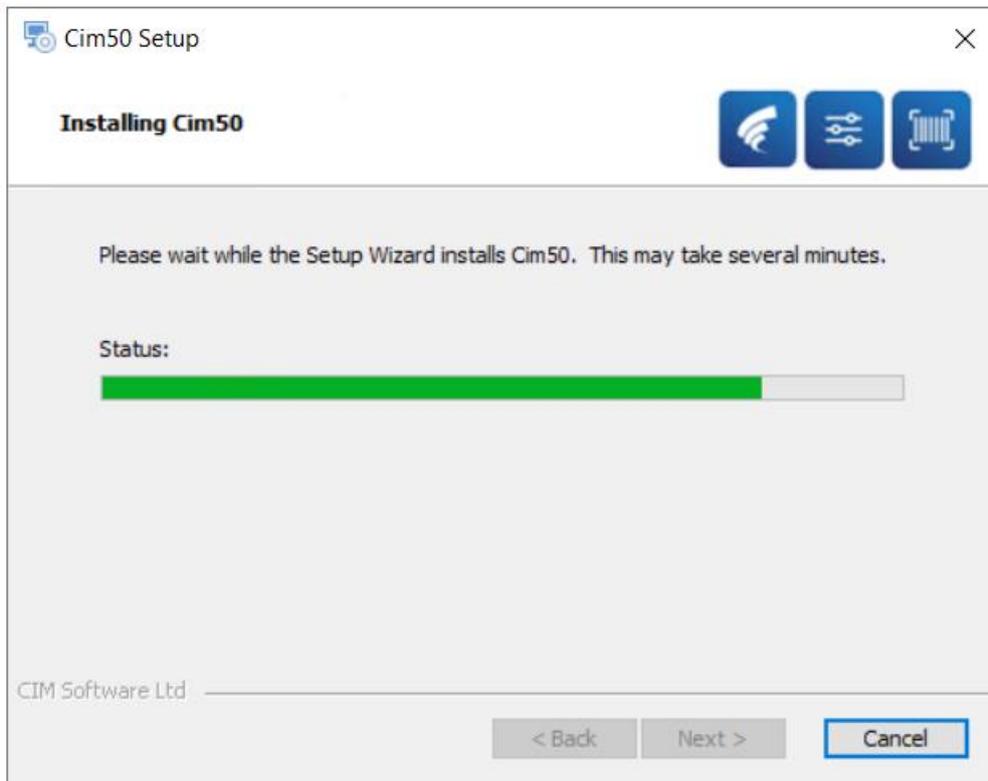
Please Note: As per wizard a reboot of the server is recommended at the earliest convenience, once installation is completed.

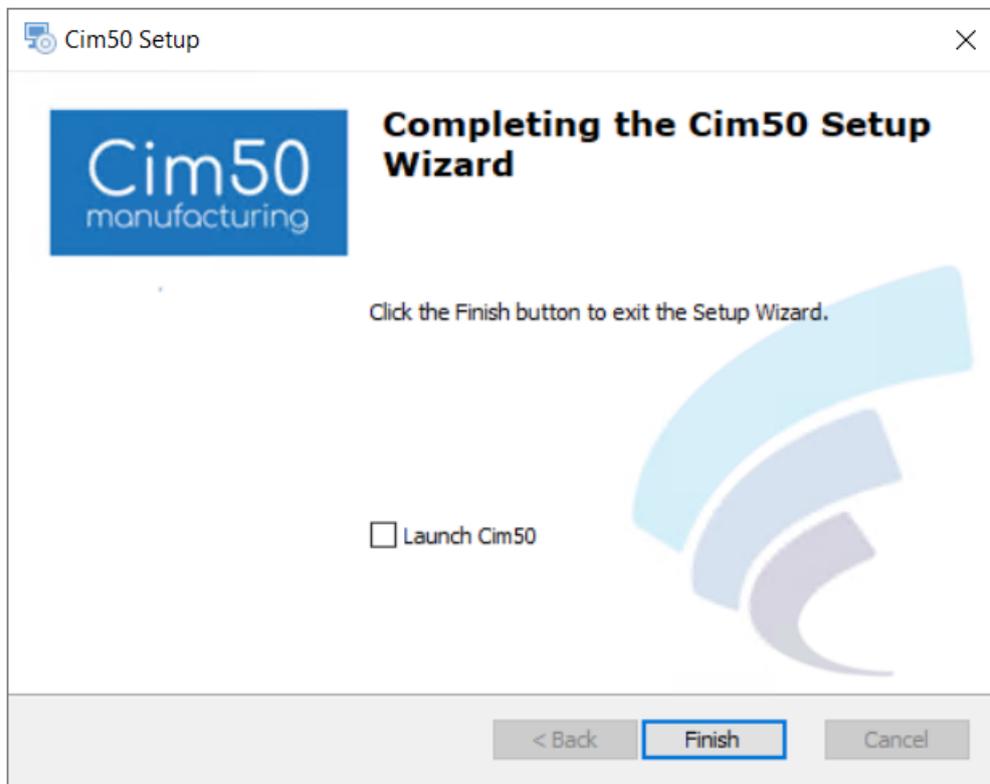
Step 3:

After selecting Client Install, click Next



Click Install to start the install





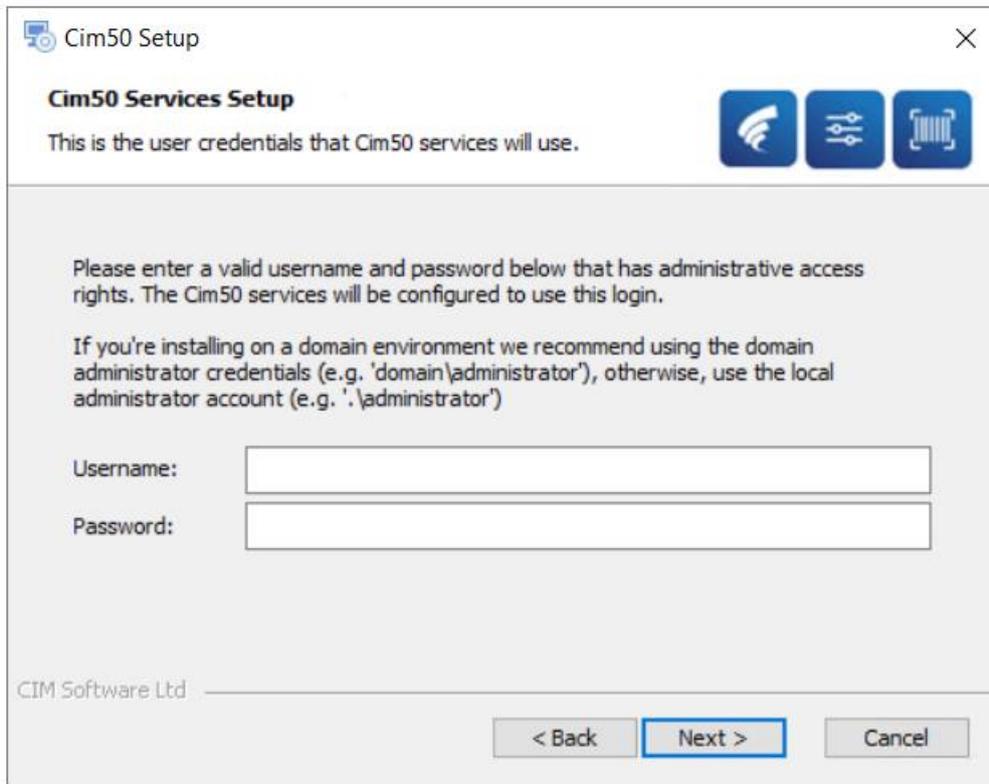
Click Finish to complete the install

Step 4:

After selecting Server Install, click Next.

New Installs:

Enter a valid domain and username (EG DOMAIN\USERNAME) and password, this user is used to run the 4 Cim50 services that are installed (As detailed in the server deployment guide), it is recommended this is the same user that you are currently logged onto the machine as.



Cim50 Setup [Close]

Cim50 Services Setup

This is the user credentials that Cim50 services will use.

Please enter a valid username and password below that has administrative access rights. The Cim50 services will be configured to use this login.

If you're installing on a domain environment we recommend using the domain administrator credentials (e.g. 'domain\administrator'), otherwise, use the local administrator account (e.g. '.\administrator')

Username:

Password:

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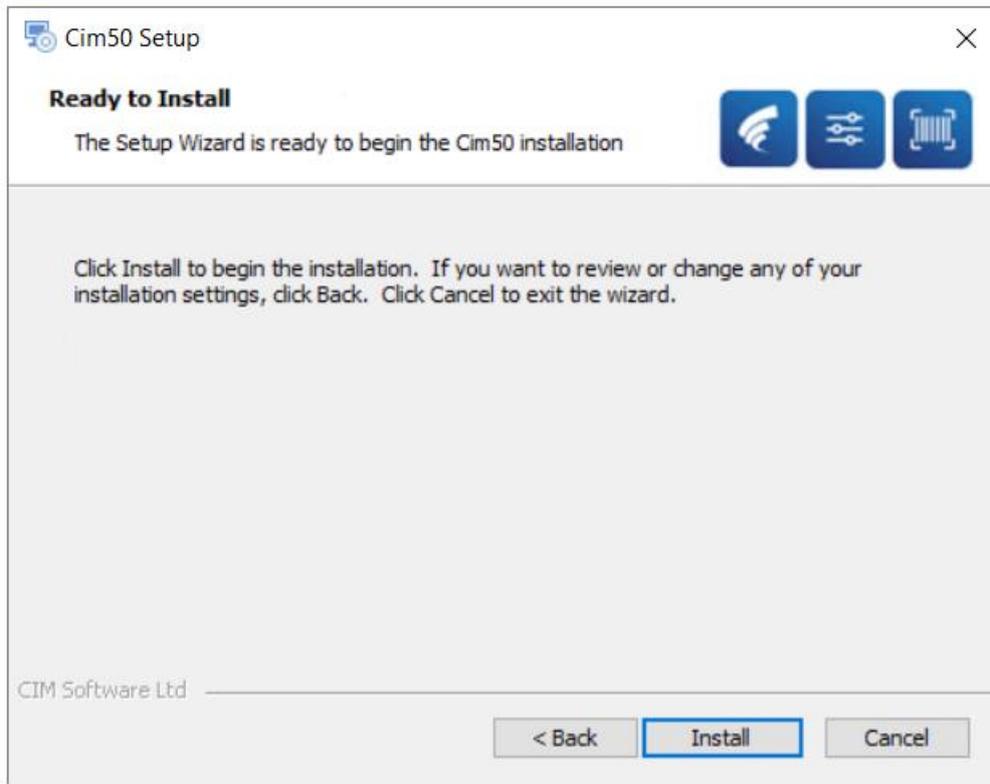
< Back **Next >** Cancel

Once valid details have been entered, click Next – See appendix 1 for assistance with finding current username details including domain

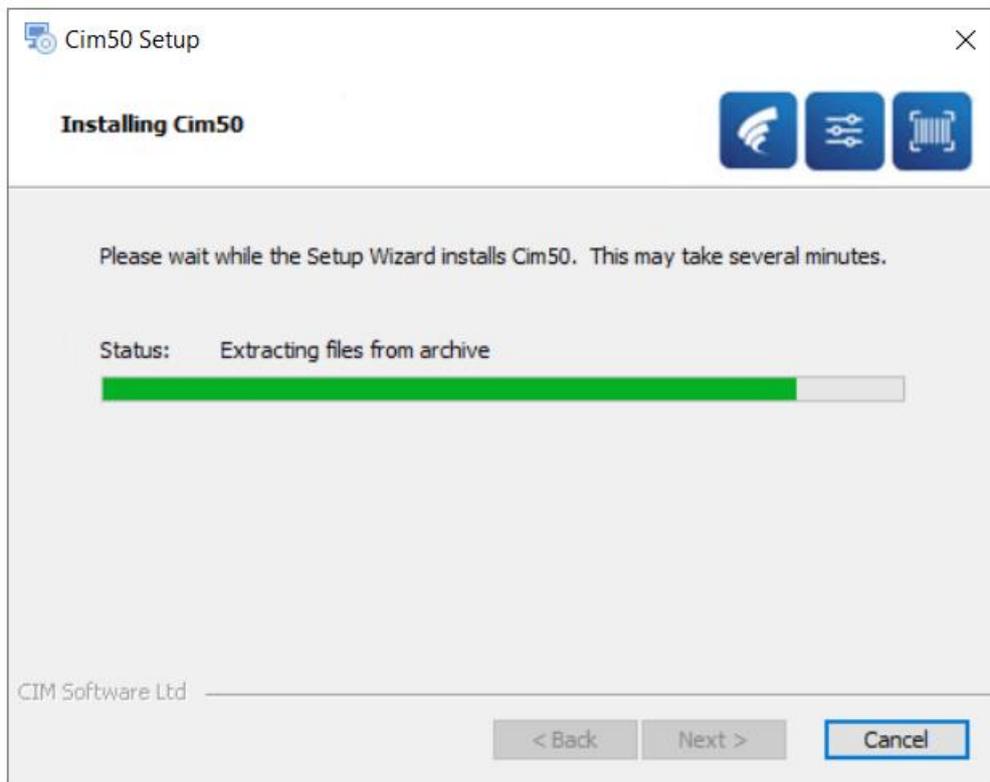
When Upgrading:

Enter the existing domain and user name along with password that has been set to run the 4 Cim50 services. This can be seen by going to Services on the server machine. EG If your services showed log in as "Marvel\administrator"

| | | | | |
|--------------------------------------------------------------------------------------------------------------------|----------------------------|---------|-----------|----------------------|
|  Cim50 Backup Agent | Cim50 Scheduled Backup | Running | Automatic | Marvel\administrator |
|  Cim50 Scheduled Planning Agent | Cim50 Scheduled Plann... | Running | Automatic | Marvel\administrator |
|  Cim50 Sync Service | Cim50 Sync Service | Running | Automatic | Marvel\administrator |
|  CIMi | Cim50 Data Integrity Se... | Running | Automatic | Marvel\administrator |



Click Install to start the install





Important:

- If upgrading from Cim50 v2021.2 or earlier

Following the upgrade, the start time for Cim50 data checks will have reverted to the default starting time of 04:00. In some cases, this start time would have been adjusted to ensure there are no clashes on the server with other processes or to ensure the data checks finishes before users start using Cim50.

So once the upgrade is complete on the server, you must review the start time that the overnight data checks run and amend as necessary if the default start has been changed during your original deployment, these can now be configured within Cim50, (See release notes) and details on how these can be configured can be found in the following guide "CIMi Says... Guide Configuring CIMi data checks"

If you are unsure if the default time was amended or want to confirm the time your Cim50 data checks start, please contact your support team.

- If Cim50 folder was moved from default location (C:\) during initial install.

Following the upgrade, you will need to remove the share using standard windows functionality from the Cim50 folder on the root of C:\ that the upgrade would have created and re-instate the share on the original Cim50 folder.

Other things to consider for new installs.

- Create a Cim50 data source in Sage Report designer if you are going to be using Cim50 fields on your Sage50c Reports and Layouts – See Cim50 guide on setting this up

If using SFDC

- Configure SFDC if requiring access to SFDC – See CIMi Says... Guide Configuring SFDC Client

Appendix 1

New installs

If you are unsure of the username and domain you are logged onto the machine as you can enter whoami within a command prompt window, this can then be used to enter the username when requested during the install. In the example below you would enter: cimservicesph\paul.fitzpatrick as the username.

```

C:\> Command Prompt
Microsoft Windows [Version 10.0.22000.856]
(c) Microsoft Corporation. All rights reserved.

C:\Users\paul.CIMSERVICESPH>whoami
cimservicesph\paul.fitzpatrick
  
```

Upgrading

When obtaining the existing username if your services show "Log On As ".\paul fitzpatrick"

| Name | Description | Status | Startup Type | Log On As |
|----------------------------------------|----------------------------------------------------|---------|--------------|--------------------|
| Cim50 Backup Agent | Cim50 Scheduled Backup | Running | Automatic | .\paul fitzpatrick |
| Cim50 Scheduled Planning Agent | Cim50 Scheduled Planning | Running | Automatic | .\paul fitzpatrick |
| Cim50 Sync Service | Cim50 Sync Service | Running | Automatic | .\paul fitzpatrick |
| CIMi | Cim50 Data Integrity Service | Running | Automatic | .\paul fitzpatrick |
| Cisco AnyConnect Secure Mobility Agent | Cisco AnyConnect Secure Mobility Agent for Windows | Running | Automatic | Local System |

You would enter the username as shown above (Ensuring case is the same)

The password would be the valid password for this user.

If you receive either of the following message during an install or upgrade, this means that username and password you have entered is either not valid (EG incorrect password) or is not an administrator user on that machine.

