Novar™ Release

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# Contents

## Overview

- What’s New .......................................................... 6
  - New Look and Feel ........................................... 6
  - CD-Key Based Installation .................................. 6
  - Enhanced Database Upgrade Script ....................... 7
  - New .NET Version Required on PCs ....................... 7
  - Novar Archive Database .................................... 7
  - SQL Files Placed on SQL Server .......................... 8
  - Automatic Novar Folder Backup and Rollback Feature ... 8
  - Automatically Transfer Critical Database Settings .... 8
  - New Novar Services Setup Utility ......................... 8
  - Troubleshooting Open Files during an Upgrade ......... 9
  - Automatically Updates Critical Configuration Files ... 12
  - Documentation Folder ....................................... 13
  - New .NET Version Required on PCs ....................... 14

## Pre-Installation

- Overview .......................................................... 15
- Before You Begin ................................................ 15
  - Contact Novar Support to Coordinate Installation Support ... 15
  - Note for Clients on a Pre-5.13.2 Novar Build ............ 15
  - Add Default Time Zone ....................................... 15
  - Stop Services .................................................. 16
  - Back Up the Database ........................................... 17
  - Verify Location of Novar Environment .................... 17
  - Verify SQL Environment Readiness ........................ 17
  - Verify SQL Installation ....................................... 17
  - Stop SQL Agent ................................................. 17
  - Verify SQL Server Processor Setting ...................... 18
(AdS) Un-install AdS Services ................................................................. 19
Verify Administrator Access ................................................................. 19
Document the Environment ................................................................. 19
Run User Permission Analysis .............................................................. 19

Installation .......................................................................................... 20
Overview .............................................................................................. 20
Run CopyNovar Utility ....................................................................... 20
Workstation (Client) Setup Instructions .................................................. 26
  Existing Environment ....................................................................... 26
  New Environment ........................................................................... 27
Database Stored Procedure Update Instructions ...................................... 27
Verify Paths ......................................................................................... 28
Rebuild Area Tables ........................................................................... 28
Additional AddOns Configurations ......................................................... 29
(AdS) Install Services .......................................................................... 29

Post Install Instructions ........................................................................ 30
Maintenance Tasks ............................................................................... 30
  Daily Maintenance ........................................................................... 30
  Nightly Maintenance ....................................................................... 31
  Weekly Maintenance ....................................................................... 31

Appendix A ......................................................................................... 32
Uninstalling Adaptive Scheduling Services ............................................. 32
Upgrading from Novar 5.13.1 or Lower .................................................. 32
  Channel Status Service Un-install .................................................... 32
  Plotter Service Un-install ................................................................. 32
  ENP Service Un-install ................................................................. 33
  BPS Service Un-install ................................................................. 33
Upgrading from Novar 5.13.2 or Higher .................................................. 33
  Channel Status and Plotter Service Un-install .................................... 33
  ENP Service Un-install ................................................................. 33

Appendix B ......................................................................................... 35
Installing Adaptive Scheduling Services ............................................... 35
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Status and Plotter Installation</td>
<td>35</td>
</tr>
<tr>
<td>Activate .NET Full Trust Security Setting</td>
<td>36</td>
</tr>
<tr>
<td>ENP Installation</td>
<td>36</td>
</tr>
<tr>
<td>Restart Services</td>
<td>38</td>
</tr>
<tr>
<td><strong>Appendix C</strong></td>
<td>39</td>
</tr>
<tr>
<td>Running User Permissions Analysis</td>
<td>39</td>
</tr>
<tr>
<td><strong>Appendix D</strong></td>
<td>41</td>
</tr>
<tr>
<td>Novar Database Information</td>
<td>41</td>
</tr>
<tr>
<td>Database Sizing Recommendations</td>
<td>41</td>
</tr>
<tr>
<td>Database Settings</td>
<td>41</td>
</tr>
<tr>
<td>Temp Db Settings</td>
<td>41</td>
</tr>
<tr>
<td><strong>Appendix E</strong></td>
<td>42</td>
</tr>
<tr>
<td>Activating AddOns After an Install</td>
<td>42</td>
</tr>
<tr>
<td><strong>Appendix F</strong></td>
<td>51</td>
</tr>
<tr>
<td>Special Instructions for Updating Novar from Root</td>
<td>51</td>
</tr>
<tr>
<td>Creating a Temporary Folder Path</td>
<td>51</td>
</tr>
<tr>
<td><strong>Troubleshooting</strong></td>
<td>53</td>
</tr>
<tr>
<td>Contacting Support</td>
<td>53</td>
</tr>
<tr>
<td><strong>Install Verification Form</strong></td>
<td>54</td>
</tr>
</tbody>
</table>
Overview

What’s New

The 6.0.x installation process has been enhanced. Several new features were added to the Novar installation routines in order to standardize, simplify and speed up the installation process.

New Look and Feel

The new installation routines have a new, user-friendly graphical interface with helpful tips and reminders that display throughout the installation process.

CD-Key Based Installation

The install process has been enhanced to include a key-verification step. During the installation, users are now required to enter a CD-Key code, which is included with the Novar disc. This key unlocks the files on the Novar disc and enables all the licensed AddOn products for this specific site.

⚠️ NOTE

Additional AddOn products can be purchased by contacting the Novar support team. Once licensing is approved, a CD-Key code will be provided to enable the new AddOn product, using the existing Novar disc.
Enhanced Database Upgrade Script

The database upgrade has been integrated into the installation process, and now features both an Analyze mode and an Upgrade mode. Installers must run the upgrade script in Analyze mode first to evaluate the database and identify potential problems. Installers can then review these results, decide how to correct any issues – such as removing any duplicate contract lines – before beginning the actual upgrade. This analysis may take place in preparation for the actual upgrade to save time when the actual production upgrade is performed.

**NOTES**

- Users are expected to run the following query and then run the upgrade script in analyze mode to enable 'xp_cmdshell':

```sql
EXEC sp_configure 'show advanced options', 1
GO
RECONFIGURE
GO
EXEC sp_configure 'xp_cmdshell', 1
GO
RECONFIGURE
GO
```

New .NET Version Required on PCs

Pre-5.13.2 Ads/Non-Ads Systems using Interconnect Setup Must Convert to Avails Grid

Systems upgrading from pre-5.13.2 that use Interconnect Setup should contact support for assistance with converting to using the Avails Grid. The conversion script AdS_Update_AvailsGrid_From_Intercon.sql must be run on the Novar system after upgrading from a Novar version earlier than 5.13.2 where records exist in the InterCon table and no records exist in the AvailsGrid table.

Novar Archive Database

Novar versions 5.14 and above creates a new Database “Novar Archive” during the upgrade process. This database is created as a future enhancement for Data Archival. This initial size of the Novar Archival will be based on the Model Database which gets created as part of SQL Server installation.

In order to minimize empty disk space allocation, no additional space is recommended for the Novar Archive Database but will be based on the size of the Model Database as it is the standard functionally of SQL Server to create any new user Database based on the size of the Model Database. The Novar Archive will be set to Auto Grow to accommodate data storage as and when new functionality is added to the Archival process.
SQL Files Placed on SQL Server

The SQL files are now being placed on the SQL Server itself so the enhanced Database Upgrade script can access them easily. The contents of the NSP folder are also now installed on the SQL Server. The NSP folder is no longer installed on the Novar environment.

⚠️ NOTE

It is highly recommended the Novar installation / upgrade be done from the database (SQL) server. This will ensure optimal performance during the upgrade.

Automatic Novar Folder Backup and Rollback Feature

A new automatic backup and rollback feature has been added. Before beginning an upgrade of an existing Novar environment, the installation process now automatically renames the existing Novar environment. In the event the upgrade does not complete successfully, installers have the option of rolling back all changes and restoring the original Novar environment.

⚠️ WARNING

This feature only backs up the Novar (application) folder. It does not backup the database. Backing up the database is still a critical part of the pre-installation process.

Automatically Transfer Critical Database Settings

When an existing Novar environment is being upgraded, the installation process now reads the critical configuration settings in the existing environment and uses them as the default settings for the new Novar environment. The Configuration Settings that are automatically transferred include:

- SQL Server Name
- SQL Database Name
- SQL Server User ID
- SQL Server Password

New Novar Services Setup Utility

A new NovarServicesSetup utility provides a centralized user-interface (UI) for efficiently installing and uninstalling one or more of the following Novar services.

- Auto Reconciliation
- Channel Status Service
- Novar Health Monitor Service
- Plotter Service
- Schedule Load Confirmation Service

The Novar Services Setup utility provides a “one-click” installation option for each service, and replaces the individual install and uninstall batch files that had been needed in the past.
**NOTES**

- *Only* the services installed at each site are displayed in the window. For example, if a site has not installed the Adaptive Scheduling (AdS) system, neither the Channel Status Service nor the Plotter Service options are displayed.
- This window shows the *current status* of all available services installed on the PC.
- All Novar services added using this utility will be set to start automatically (the default) *when the PC is rebooted*. It is no longer necessary to change the startup type manually through Services Manager.
- While this utility installs the batch files; Adaptive Scheduling (AdS) users will still need to use AdS Monitor to start the AdS services such as Plotter, Channel Status, ENP after all the AdS services have been successfully installed / re-installed and the PCs rebooted – where the services have been installed.
- The install and uninstall batch files will still be included with each release.

**Troubleshooting Open Files during an Upgrade**

*All Environments*

*CopyNovar.exe* will display a list of open files/folders that are preventing the upgrade from completing successfully. When open files are detected, a Please Review window opens to display all open files on the Novar Server. The files and/folders causing the error are usually denoted with an asterisk.

If no files/folders are in the display screen, follow the steps below.

**SQL 2000**

Use the following options to resolve open file issues:

1. Verify no users are accessing Novar Client Folder from Internet Explorer or Web-services (Media Exec, STRATA/TIM, etc.).
   
   a. For AdS: you can run the following statements to check if locks and determine what machine it is on: Select * from Reserve.

2. Verify all AdS Services are stopped (Channel, ENP, Plotters).

3. Verify SQL Agent is Stopped.
4. Check **Current Activity Screen** from SQL Server Enterprise Manager Access: SQL Server Enterprise Manager/\Microsoft SQL Servers/SQL Server Group/Local/ Management/Current Activity/Process Info:

   a. Search for User and Database Name
   
   b. If found, notify user to please exit.
   
   c. If user is not in the system, **Right Click** on identified user and select **Kill Process**.
   
   d. Go back to CopyNovar.exe and re-run application.

5. **Un-share and Share the Novar Client Folder**:

   a. When action to unshared is applied, you will receive a message noting the number of users that are connected.
   
   b. Un-share Folder and share the Novar Client Folder again.
   
   c. Go back to CopyNovar.exe and rerun application.

**SQL 2008**

Use the following options to resolve open file issues on SQL 2008:

1. Verify no users are accessing Novar Client Folder from Internet Explorer or Web-services (Media Exec, STRATA/TIM, etc.).

   a. For AdS: you can run the following statements to check if locks and determine what machine it is on: Select * from Reserve.

2. Verify all AdS Services are stopped (Channel, ENP, Plotters).
3. Verify SQL Agent is stopped.

4. Check **Activity Monitor Screen** from SQL Server Enterprise Management:

   a. Two ways to access:

      i. See **Main Tool Bar** (Icon circled in Red below).

         ![Main Tool Bar](image)

      ii. See **Object Explorer**.

         - **Right-Click** on server name and select **Activity Monitor**.

         ![Object Explorer](image)

      b. **Activity Monitor** will open:

         i. Search for Login and Database Name.

         ii. If found, notify user to please exit.

         iii. If user is not in the system, **Right Click** on identified user and select **Kill Process**.

         iv. Go back to CopyNovar.exe and rerun application.
5. Un-share and Share the Novar Client Folder:
   d. When action to unshared is applied, you will receive a message noting the number of users that are connected.
   e. Un-share Folder, share the Novar Client Folder again, and rerun CopyNovar.exe.

6. Also in the right-click menu, you can also start the SQL Server Profiler, which will run a trace on whatever particular process you have selected. This will automatically filter the trace on that process SPID.

Automatically Updates Critical Configuration Files

Several sections of the upgrade process have been automated. The following files will now be updated and transferred to the new Novar environment automatically. Previously, existing sites had to reconfigure these files manually as part of the install process.

- Core Novar files
  - Novar.ini
  - SecuritySetup.bat
  - NovMenu.txt
    (The correct NovMenu.txt file is selected based on the Novar environment)
    - NIN_NOC
    - Adaptive Scheduling
    - Other
  - NovarWhosLocking.exe.config

- Auto Reconciliation files
  - AutoRecServiceInstall.bat
Installation Instructions

- AutoRecServiceUnInstall.bat
- AutoRecService.exe.config
- Adaptive Scheduling files
  - ChannelStatus.ini (Only when upgrading)
  - ChannelStatusSVCInstall.bat
  - ChannelStatusSVCUninstall.bat
- PlotterSVCInstall.bat
- PlotterSVCUninstall.bat
- Cox Workbook Extract files
  - JDE_Loader.exe.config
- Gatekeeper Contract Import Files
  - Gatekeeper.ini
- Novar Health Monitor files
  - NovarHealthMonitorSVCInstall.bat
  - NovarHealthMonitorSVCUninstall.bat
- Schedule Load Confirmation files
  - SLCSVCInstall.bat
  - SLCSVCUnInstall.bat
  - ..\Install\Schedule Load Confirmation\ScheduleLoadMonitor\config.cfg
  - ..\Install\Schedule Load Confirmation\ScheduleLoadMonitor\Novar.ini

**WARNINGS**

- *Never copy* these files (.bat, .ini, .cfg, or .config) from the **Backup** folder.
- The **Images** folder is an exception to this *no-copy* rule. This folder can and should be copied back to return logo images, etc. to the new Novar environment.

**Documentation Folder**

The **CopyNovar** process has been enhanced to now copy the contents of the **Documentation** folder on the Install CD / Image to the Novar Environment to make it easier for users to find them after the install/upgrade.

**NOTE**

The **Documentation** folder contains release documentation such as Release Notes, Novar Install Instructions, System Admin Guide, Enhancement Guides, Novar Help file (.chm), etc.
New .NET Version Required on PCs

The new Novar Reporting application requires Microsoft .NET Framework 3.5, Service Pack 1 be installed on each user’s PC. Therefore, sites running Adaptive Scheduling (AdS) will need to install this .NET version on each user’s PC in order to take advantage of two new AdS Scheduling Reports.

Microsoft .NET Framework 3.5 also includes the .NET Framework 2.0, 3.0 in the same install package. However, it is over 250MB and is therefore too large to distribute with the Novar Install CD.

For more information and to download, click the link below, or copy and paste it into an internet browser window: http://www.microsoft.com/downloads/details.aspx?FamilyID=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en
Pre-Installation

Overview
Following are the instructions for installing the core Novar™ release – version 6.0.x. Based on the type of environment being updated or created, the instructions will vary slightly.

Possible environments include:

- **Existing Environment** – An environment where no name changes are needed for the database, servers, Novar directory, etc.
- **New Environment** – A new installation or an environment where name changes are needed for the database, server, Novar directory, etc.

⚠️ NOTE
AddOn products such as the Report Management System™ (RMS) and MediAExec™ are installed separately and will have their own set of installation instructions.

Before You Begin
Imagine Communications recommends reading through the entire document to familiarize yourself with the entire installation process before beginning.

Contact Novar Support to Coordinate Installation Support
Before installing a new Novar version, contact Novar Support at 303.476.5066 or email us at broadbandsupport@imaginecommunications.com to coordinate the backup of the current database and document any custom (client) tables that exist.

Note for Clients on a Pre-5.13.2 Novar Build
Prior to executing nsp_NovarUpgradeDataCleansing, clients upgrading from a Pre 5.13.2 version of Novar to any version of 6.0.x must execute nsp_DC_Alter_Pre5132Tables_ToSupport515, located on the Imagine Communications FTP site.

Please contact Novar Support for assistance.

Add Default Time Zone
A new Novar system configuration value has been created to aid in the conversion of the BBS Name time-zone information during the upgrade. Before beginning the 6.0.x upgrade, enter the appropriate System Configuration **DefaultTimeZone** value. Valid Time Zone options include:
Now when the upgrade script runs, the system will automatically convert any single-character, time-zone values to the corresponding three-character, time-zone value. In addition, all BBS Name entries with a blank (no time-zone) value will be automatically converted to the Default Time Zone value as set in System Configuration.

For example, a version 3.7 site with multiple time zones sets DefaultTimeZone = _CNT. Before the upgrade, the Channel table shows BBS Name values of: CNN; USA_m; ESPN_c; and TNT_e. The 5.13.2 upgrade will update the BBSName for all networks that are provided by Enhanced Network Programming (ENP), whether or not the customer subscribes to that network.

After the upgrade, the BBS Name values will have been converted to the appropriate three-character, time-zone value and blanks will have been converted to the Default Time Zone setting such as:

- CNN = CNN_CNT
- USA_m = USA_MTN
- ESPN_c = ESPN_CNT
- TNT_e = TNT_EST

**Note**

If the Default Time Zone value is not set before beginning the install, during the upgrade the system will generate the message: “WARNING!!! Default Time Zone not set up in SystemConfig! If the Default Time Zone is not set prior to the installation, it will default as BBS Name + _EST for all non-blank BBS Names! ...”

**Stop Services**

(Existing environments) Stop all applicable services before backing up the database.

1. Stop all services
   - Plotter
   - Channel Status
   - BPS
1. **ENP**
   - **Schedule Load Confirmation (SLC)**
   - **AutoRec**

2. **Stop all web services**
   - **RMS**
   - **eBOX**

3. **Stop Zip Master and Zip Stations**

   **NOTE**
   If installing Adaptive Scheduling (AdS) after upgrading the Novar application, installer will be directed to delete the auto schedule and soft schedule jobs as part of the AdS pre-install process.

### Back Up the Database

(For existing environments only) Back up the database and verify that it is valid.

**NOTE**
Recommendation: Rename or move this backup to a safe location so it is not overwritten by any automated backup processes that may run as part of the upgrade.

### Verify Location of Novar Environment

The **CopyNovar** section of the upgrade will not complete successfully if the Novar Environment is located at the root of a drive or share such as C: or N:. For information on adapting the install to accommodate this situation please see **Appendix F**.

### Verify SQL Environment Readiness

Key settings and space-availability items should be reviewed prior to beginning the upgrade. For information on the items and how to verify / update them please see **Appendix D**.

### Verify SQL Installation

If you have *multiple* installations of SQL, verify the DOS path matches the required SQL installation level for Novar.

**NOTE**
For more information, please contact Novar Technical Support.

### Stop SQL Agent

Stop the SQL Agent to prevent scheduled jobs from running during the install / upgrade.
The SQL Agent jobs will need to be restarted once the upgrade has successfully completed.

**Verify SQL Server Processor Setting**

Before beginning the upgrade, verify the SQL Server setting *Use All Available Processors* is selected.

**SQL Server 2000**

This SQL Server property is located at SQL Server Enterprise Manager → Tools → SQL Server Configuration Properties on the Processor tab in the Parallelism section.

**SQL Server 2008 R2**

By default, SQL Server 2008 R2 uses all the available processors. This can be verified at SQL Server Management Studio. Select database server and right click Properties → Processors, it should show ALL and when node is expanded all available processors should be shown as below:
Prior to version 5.xx, Novar recommended setting this property to use only a single processor.

Changing the setting to use all available processors should significantly boost performance.

Whenever this setting is changed, please stop and restart the SQL Server to get the change to take effect.

(AdS) Un-install AdS Services

All Adaptive Scheduling (AdS) sites should un-install the AdS services before proceeding with the Novar installation. For detailed instructions, please see Appendix A.

Verify Administrator Access

(Existing environments) Verify the user ID used to log onto the system is in the Novar User table and has network administrator rights. The administrator must have rights to install, write and save to:

- SQL Server
- Novar Install folder
- Adaptive Scheduling (AdS) services machines (if appropriate)

Document the Environment

Complete the following steps to document the existing environment.

(For existing environments only) Take a print screen of current System Configuration and send to the Imagine Communications consultant or broadbandsupport@imaginecommunications.com

Run User Permission Analysis

A User Permission Analysis must be performed during pre-installation for any clients upgrading from a pre-5.xx release (such as 3.7 or 4.5) to a 6.0.x release. For detailed instructions, please see Appendix C.

⚠️ WARNING

Failure to perform this analysis may result in a loss of user permissions for users with invalid mappings from the Users table to the Area Access table.

When upgrading from a 5.xx version (such as 5.11), please skip this step altogether.
Installation

Overview

Once all the appropriate pre-installation steps have been completed, proceed with the installation. The following instructions may vary based on the type of environment being upgraded. Unless specifically noted, the following installation steps apply to all environment types.

The Novar installation process has been enhanced. Installation information will display on the screens throughout the entire install to help guide users through the upgrade process. Please thoroughly read this information before proceeding to the next step.

Run CopyNovar Utility

It is highly recommended that CopyNovar be run from the SQL Server that is hosting the Novar database. This system is required to have SQL 2000 Query Analyzer installed.

When run from a non-host server, that system must also have administrative access to the SQL Server folders through a share or UNC.

NOTES

- CopyNovar will install the “core” Novar files and any selected AddOn applications.
- The Cancel button will immediately terminate the CopyNovar utility. No roll-back or cleanup of any kind is done by the CopyNovar process.
- The database upgrade script can be restarted or re-executed at any time without harm to the database.
- Any non-Novar tables will be dropped during the database upgrade process.
- The upgrade script can be run in one of two modes.
  - Analyze mode – To analyze and evaluate the readiness of the current Novar database for upgrade.
    - The Analyze mode flags many (but not all) items that need to be addressed.
  - Upgrade mode – To upgrade the database.
    - The Upgrade mode will alert the installer to additional items, not flagged during Analyze, that need installer intervention.
    - Upgrade mode writes any table modifications to the NovarUpgrade table.
- CopyNovar has been modified to remove unnecessary messaging when running SecuritySetup.bat. The system has been modified to now only notify users if an actual installation error occurs such as:

  “!!!! WARNING !!! Microsoft .NET Framework 1.1 must be installed to continue. It is included with the Novar Workstation Setup MSI or can be downloaded from Microsoft. Please install it and rerun this utility. Press any key to continue or CTRL-C to terminate.”

  “!!!! WARNING !!! Error occurred setting up security! Contact Novar Customer support with details of the error shown above. Press any key to continue or CTRL-C to terminate.”

To run the CopyNovar utility:

1. Log on using an Administrator signon.
   The Administrator must have full rights to Novar folders and to all the servers where the Novar application and database will reside.

   **NOTE**

   When CopyNovar is run on a system with UAC enabled, the following message is displayed:

   "You must be an administrator on this computer"

   Right-click CopyNovar and select "Run as administrator" to complete the CopyNovar installation.

2. Insert the Novar CD in the disc drive to automatically start the CopyNovar utility.
   The Welcome to the Novar Setup Wizard window opens.
   - If it doesn’t start automatically, run CopyNovar.exe from the root of the CD.
   - If installing from a zipped CD image, unzip all the files to a temporary location and run CopyNovar.exe from there.

3. On the Welcome to the Novar Setup Wizard window enter (or confirm) the CD Key value and select Next.

4. A list of the licensed AddOns for this site is displayed.
   Select OK to continue or Cancel – to abort the install.

5. On the Novar Environment to Upgrade window, enter / browse (or confirm) the Novar Environment value and select Next.

6. On the Novar Configuration window, enter (or confirm) the following values and select Next:
   - SQL Server Name [\Instance]
     - If using a clustered SQL Server, enter the SQL Server Network Name
   - SQL Database Name
   - SQL Server User ID
- **SQL Server Password (encrypted)**
7. On the Novar Database Upgrade window, the SQL Root Path is automatically populated. When Database Upgrade Status shows Upgraded or Newer, select Next.

![Novar Database Upgrade window](image.png)

When Database Upgrade Status shows Not Upgraded, run the following steps.

a. Select Analyze Database... button to open Query Analyzer window.
   i. For SQL Server 2000, navigate to Tools→Options→Connection Properties tab and verify the Set quoted_identifier check box is not checked.
   ii. For SQL server 2008 R2, quoted identifier is turned off by default. This can be verified by navigating to SQL Server Management Studio→Select Novar database and right click Properties→Options→Quoted identifiers Enabled is false.
   iii. Execute the upgrade script (in Analyze mode).
   iv. Review results on both Grids and Messages tabs.
   v. Save copy of results and send to broadbandsupport@imaginecommunications.com.
   vi. Close Query Analyzer window.
b. Select **Upgrade Database**... button to open the **Database Upgrade Mode Selected** window.

i. Select **Yes** to open the **Query Analyzer** window  
(or **No** to return to the **Novar Database Upgrade** window).

1. Execute the upgrade script (in Upgrade mode).
2. Review results on **Messages** tab.
3. Save copy of results and send to  
   [broadbandsupport@imaginecommunications.com](mailto:broadbandsupport@imaginecommunications.com)
4. Close **Query Analyzer** window.  
   *(See next page for Warning information.)*
WARNING
If you receive a Completed with Errors message, contact Novar Support for further instructions.

8. On the New Novar Environment window, enter / browse (or confirm) the Novar Environment value and select Next.

9. On the Novar Files to Install window, change or confirm the install settings and select Next.

NOTES
- The Message Center section displays additional installation and progress information.
- See Appendix E for information on installing an AddOn after and independent of the initial install.

10. A Confirm Installation dialog box opens. Select Yes to continue, or No to return to the previous screen.

11. If open files are detected, a Please review... window displays a list of all open files on the Novar server. Work with users or IT Support to close any open files before continuing.

NOTES
- Although not the recommended method; the Computer Management console on the Novar Server can be used to close open files or end open sessions.
- The files / folders suspected of causing the error are typically denoted with an asterisk. However, depending on the specific configuration of the Novar environment, the files preventing the upgrade may not have an asterisk.

12. Depending on the AddOns being installed, additional prompts will display. Verify paths for each selected addon and click Next. Options will include:

   a. Gatekeeper Contract Import
      The prompts are pre-populated with the values used in the Novar environment being upgraded. Modify the values as needed.
      *These values can also be changed through the Gatekeeper application.
      i. Einvoice Source Directory
         (Default = TmpNet subfolder of Novar environment)
      ii. Einvoice Destination Directory
         (Default = TmpNet subfolder of Novar environment)
      iii. System Call Letters (Default = DEFAULT)
      iv. ConImport Source Directory
         (Default = TmpNet subfolder of Novar environment)
      v. ConImport Destination Directory
         (Default = TmpNet subfolder of Novar environment)
b. Cox Workbook Extract
The prompts are pre-populated with the values used in the Novar environment being upgraded. Modify the values as needed.

i. Fully qualified name of the connection file
   (Default = "C:\\winnt\\WorkbookAutomation.txt")

ii. Fully qualified name of the log file
    (Default = to "C:\temp\\WS_Extractor_Log.txt")

iii. Fully qualified name of the log file
     (Default = "C:\temp\\WS_Extractor_Log.txt")

iv. Fully qualified name of folder for data files
    (Default = "C:\temp")

v. Prefix to use when naming the data files
   (Default = "itgli0101cmi_act_")

13. On the Final Steps! window, review the information and select Exit.

---

**Workstation (Client) Setup Instructions**

Once the 6.0.x file server installation is complete, update each of the workstations. The instructions have been divided into two types: new and existing environments. Follow the instructions for the environment that is appropriate for this update.

⚠️ **NOTE**

It is not recommended to install Novar on a machine with Server 2008 R2 installed due to compatibility issues with .net.

**Existing Environment**

The following steps will need to be performed on each workstation:

1. Log on as the Administrator.
2. Use Add/Remove programs to uninstall the Novar Core Components.
3. Use Add/Remove programs to uninstall Novar.
4. Go to the New Client\Workstation Setup subfolder:
   - Double click on setup.exe to install Novar workstation files.
   - Double click on UIBlock.Windows.msi to repair the Harris UI Block (Window Forms) files.
5. Go to the New Client\Novar subfolder.
   - Double click on NovarCore.msi to install Novar Core Components.
   - Double click on SecuritySetup.bat to install components for .Net applications.

   **Note:** For Windows 8 machines, SecuritySetup.bat needs to be copied to the desktop and run as Administrator.
6. Verify access to Novar by double clicking on the novexec.exe in the New Client\Novar subfolder.

**New Environment**

The following steps will need to be performed on each workstation:

1. Log on as the Administrator.
2. Map a shared drive to the New Client folder.
3. Go to the New Client\Workstation Setup subfolder:
   - Double click on setup.exe to install Novar workstation files.
   - Double click on UILBlock.Windows.msi to install the Harris UI Block (Window Forms) files.
4. Go to the New Client\Novar subfolder:
   - Double click on NovarCore.msi to install Novar Core Components.
   - Double click on SecuritySetup.bat to install components for .Net applications.
   
   **Note:** For Windows 8 machines, SecuritySetup.bat needs to be copied to the desktop and run as Administrator.
5. Create a Novar shortcut on the desktop for the novexec.exe file.
6. Verify access to Novar by double clicking on the novexec.exe in the New Client\Novar subfolder.

---

**Database Stored Procedure Update Instructions**

1. Go to the folder that contains the Novar folder such as New Client\Novar.
2. Run UtilRep.exe
3. Ensure that the /DBMaint switch is in the command-line data field and click OK.
4. On the Database Maintenance screen verify the log path, verify all check boxes are selected, and click OK.
5. Verify the Database Update screen is pointing to the SQL file folder for this database on the SQL Server and click OK.
   - The SQL file folder is on the SQL Server. It is a “Novar\**NovarDatabaseName**” subfolder of the SQL Root folder specified on the Novar Database Upgrade screen in the CopyNovar utility.
   - For example, if “C:\Program Files\Microsoft SQL Server\MSSQL” was specified as the SQL Root, and the SQL Database Name is “512_ADS”, the SQL file directory is “C:\Program Files\Microsoft SQL Server\MSSQL\Novar\512_ADS”.

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When performing a major upgrade, on the Stored Procedure Update dialog box, select Yes to drop and re-create all objects.

Major upgrade (e.g. upgrading from 5.11, 5.13.1, 5.14.1, 5.15 to 6.0.x)

When performing a minor upgrade, on the Stored Procedure Update dialog box, select No to drop and re-create only the objects that have been modified since the last upgrade.

Minor upgrade (e.g. upgrading from 5.13.1Rush Pack to 5.13.1Rush Pack)

6. Review the maintenance log file to verify files loaded properly.

## Verify Paths

Verify the following paths point to the correct Novar directories.

1. For System Configuration, from Novar select **Advanced → System → Setup → Configuration** and verify:
   - DefPath
   - LogoFile
   - TmpNet

2. For Insertion Channel Setup, from Novar select **Traffic → Network Setup → Insertion Channel Setup** and verify:
   - Schedule Path
   - Verification Path
   - BBS extensions for program imports

### NOTE

- If upgrading from a pre-5.xx system (such as 3.7) to a 5.xx (non-AdS) environment, access the Channel table to verify the BBS Name (e.g., CNN_EST) is correct before continuing.
  - If the BBS Name does not contain the three-digit, time-zone extension, please update the Channel table. Contact technical support for assistance in implementing this change.
  - If installing Adaptive Scheduling (AdS) after completing this 6.0.x upgrade, no additional steps are required at this time. The BBS Name change will be handled during the AdS install process.

## Rebuild Area Tables

The Area Table Rebuild process must be run to rebuild user permissions to Novar applications. To run, from Novar select **Analysis → Utilities → Area Table Rebuild.**
Additional AddOns Configurations

AddOns must now be reconfigured.

- If installing Adaptive Scheduling (AdS) for the first time, please refer to the “Adaptive Scheduling Install Instructions”
- Review the list of AddOns that include additional installation information (noted earlier).
- For all other AddOns, please read and follow the installation information. (A ReadMe.txt file will be found in the Install subfolder for several of the AddOns.)

⚠️ WARNINGS

- Never copy configuration files from the Backup folder that is created during the upgrade.
- The Images folder is an exception to this no-copy rule. This folder can be copied back to return logo images, etc. to the new Novar environment.

(AdS) Install Services

Existing Adaptive Scheduling (AdS) environments will need to re-install the AdS services and restart the services. For detailed instructions, please refer to Appendix B.
Post Install Instructions

Imagine Communications recommends all Novar clients implement the following maintenance tasks. After each release, verify all existing maintenance jobs are intact. Set up others as appropriate and restart SQL agent.

As part of the 6.0.x install / upgrade; a new job script was added to automatically create any of these missing maintenance tasks. The NSP_DC_NovarMaintenanceJobs_Create script is a multi-execution safe T-SQL script that will create any missing Novar standard maintenance job.

⚠️ NOTE

For additional information on the various maintenance tasks, refer to the Novar System Admin Guide document, which is included in the Documentation folder on the Install CD.

This Novar Maintenance Jobs script creates several standard maintenance jobs for both backup and table maintenance tasks that include:

- **Novar Database Backup** - Full, Daily
- **Novar Log Backup** - Incremental, Current
- **(Novar) Conline Projection Update** – Periodic (including post installation)
- **(Novar) Table Maintenance** – Nightly
- **(Novar) Table Maintenance** – Weekly
- **(Novar) Data Consolidation** – Nightly

The two backup jobs are created as shells or containers that will need to be customized for each environment. The table maintenance jobs are created fully configured, ready for scheduling and use.

⚠️ WARNING

All jobs are created with a status of Disabled and Inactive (not scheduled). Before these jobs will function as expected, the system administrator or a Novar Client Services consultant will need to review, set up the appropriate schedule times and switch each to Enabled.

---

**Maintenance Tasks**

Information and the recommended frequency for running these maintenance tasks are listed next.

**Daily Maintenance**

- Run Scheduled Job **(Novar) Conline Projection Update – Periodic** (every 20-30 minutes, throughout the workday).
- Run incremental backup of Novar Log file to allow for incremental restores if desired.
Nightly Maintenance

- Run Scheduled Job (Novar) Table Maintenance – Nightly (typically in the middle of the night).
- Run complete backup of Novar data file.

Weekly Maintenance

- Run Scheduled Job (Novar) Table Maintenance – Weekly (typically early Sunday morning).
Appendix A

Uninstalling Adaptive Scheduling Services

Un-install the following Adaptive Scheduling (AdS) services. Once finished, refresh the Services window to validate that services are no longer installed.

⚠️ NOTES
- Sites installing AdS for the first time do not need to uninstall these services. Only clients that are already running AdS will need to uninstall and re-install these services.
- Services must be uninstalled directly from the machine on which it has been installed.
  - Must have a mapped drive to Novar environment
  - Access NovarServices.exe
- After 6.0.x is installed, users may use the new Novar Services Setup utility to uninstall / install AdS services.

Upgrading from Novar 5.13.1 or Lower

Follow these steps to un-install AdS Services when upgrading from Novar version 5.13.1 or lower.

Channel Status Service Un-install
1. Locate the ChannelStatusSVCUninstall.bat in the \Install\Adaptive Scheduling folder
2. Right click the ChannelStatusSVCUninstall.bat and select Edit.
3. Modify the file to include the full UNC path ("\servername\sharename\foldername\Novar") to the ChannelStatusService.exe in the Novar directory. Save the file.
4. Double click to run the ChannelStatusSVCUninstall.bat.

Plotter Service Un-install
1. Locate the PlotterSVCUninstall.bat in the client’s \Install\Adaptive Scheduling folder
2. Right click the PlotterSVCUninstall.bat and select Edit.
3. Modify the file to include the full UNC path ("\servername\sharename\foldername\Novar") to the PlotterSVC.exe in the Novar directory. Save the file.
4. Double click to run the PlotterSVCUninstall.bat.
5. Repeat Steps 1-3 for each PC that has a Plotter Service installed.
ENP Service Un-install

1. Launch the ENP.Install.GUI.exe in the Novar directory.

   NOTE
   Take a screen capture of the Service Setup tab to aid in reinstalling the service later.

2. Select the Service Config tab.

3. Click the Uninstall Service button.

BPS Service Un-install

NOTE
BPS is only available in Novar 5.13.1 and earlier. As of 5.13.2, the Balance Process Service is no longer needed. Its functionality has been incorporated into other AdS services.

1. Locate the BPSUninstall.bat in the client’s \Install\Adaptive Scheduling folder
2. Right click BPSUninstall.bat and select Edit.
3. Modify the file to include the full UNC path ("\servername\sharename\foldername\Novar") to the BPS.exe in the Novar directory. Save the file.
4. Double click to run the BPSUninstall.bat.

Upgrading from Novar 5.13.2 or Higher

A new Novar Services Setup utility has been included with the 5.13.2 release to make the uninstall process more efficient. When upgrading from Novar version 5.13.2 or higher, follow these steps to uninstall AdS Services.

Channel Status and Plotter Service Un-install

1. Launch the NovarServiceSetup.exe in the Novar directory from each PC running an Adaptive Scheduling Service.
2. Click the Uninstall button associated with the service.
3. Repeat for each PC that has an AdS Service installed.

ENP Service Un-install

1. Launch the ENP.Install.GUI.exe in the Novar directory.

   NOTE
   Take a screen capture of the Service Setup tab to aid in installing the service later.

2. Select the Service Config tab.
3. Click the **Uninstall Service** button.

Once finished, refresh the AdS Monitor’s **Services** window to validate that these services have been uninstalled.
Appendix B

Installing Adaptive Scheduling Services

If a service was uninstalled as part of the upgrade process, it will need to be re-installed now. A new Novar Services Setup utility has been included with the 6.0.x release to make this process more efficient. Once all services have been re-installed, use AdS Monitor to restart the services.

Channel Status and Plotter Installation

1. From each PC that will be running one of the Adaptive Scheduling (AdS) services, launch the NovarServiceSetup.exe in the Novar directory.
2. Enter User ID and Password values.
3. Click the Install Service button next to each service being installed on the PC.
4. Repeat for each PC that will be running an AdS Service.
WARNING

Do not start the service now! You will be instructed to start the services from AdS Monitor once all the services have been re-installed.

Activate .NET Full Trust Security Setting

While installing the Plotter Service or even when opening the AdS Monitor; several sites have encountered the error message:

“Application has generated an exception that could not be handled. Process ID = Oxcac (3244), Thread ID = Oxc24 (3108).”

If this error message is encountered, change the intranet setting to full trust and reinstall.

1. Navigate to Settings ➔ Control Panel ➔ Administrative Tools.
2. Click Microsoft .NET Framework 1.1 Configuration.
3. Click the Runtime Security Policy folder on the left side of the screen.
4. Click the Adjust Security Zone link displayed in the main window
5. Click Next on the Security Adjustment Wizard dialog box.
   *Default = Make Changes to This Computer.
6. Click to select the Local Intranet icon.
7. Move the slider bar up to Full Trust.
8. Click to select the My Computer icon.
9. Move the slider bar up to Full Trust.
10. Click Next and Finish to save the changes and exit.

ENP Installation

1. From the PC where the ENP Service will run, locate the ENP.Install.GUI.exe in the ...\Novar folder.
2. Double click to run the ENP.Install.GUI.exe.
3. On the Service Setup tab, validate that the web service URL is:
   http://enp.imaginecommunications.com/SyncEngine.asmx

   Note: The URL : http://enp.imaginecommunications.com/SyncEngine.asmx is a sample and will vary based on the client.
4. Update the client’s **Subscriber ID, WS Login, and WS Password** information, which was documented during pre-installation.

5. Update the **Sync Service Wait Interval** (to specify how often the ENP service checks for updates) and the **Sync Service Debug Logging**.

6. When finished, click **Save Settings**.
7. Click to open the **Service Monitoring** tab and select **Install Service**.

![Service Monitoring](image)

8. When prompted, enter user name as domain\username, and password. Click **OK**. Once it completes, a completed-successfully message displays.

**NOTE**

If a service does not install, check the log file for that service in the Novar Folder such as ...
\Novar\ENP.Sync.Service.InstallLog.

**WARNING**

*Do not start* the service now! You will be instructed to start the services from AdS Monitor once all the services have been re-installed.

---

**Restart Services**

Now that all the AdS services have been re-installed, open **AdS Monitor** to restart all services.

1. Navigate to **Traffic \ Scheduling \ AdS Monitor**.
2. Right click and select the **Service / Start** menu option for each service.
Appendix C

Running User Permissions Analysis

A User Permission Analysis must be performed during pre-installation for any clients upgrading from a pre-5.xx release (such as 3.7 or 4.5) to a 6.0.x release. This step is not necessary when upgrading from a 5.xx version (such as 5.11).

⚠️ WARNING

Failure to perform this analysis when upgrading from a pre-5.xx release may result in a loss of user permissions for users with invalid mappings from the Users table to the Area Access table.

To analyze user permissions in preparation for upgrading:

1. From SQL Query Analyzer, run ScriptA.

   **ScriptA**

   ```sql
   Select Distinct [AreaAccess-NetworkLoginName] = LTrim(RTrim(a.NetworkLoginName))
   From dbo.AreaAccess a with(nolock)
   Where Not Exists
   (Select 1 From dbo.Users t with(nolock) Where LTrim(RTrim(t.NetworkLoginName))
   = LTrim(RTrim(a.NetworkLoginName)))
   Order By LTrim(RTrim(a.NetworkLoginName))
   ```

2. Analyze the results.

   If records are found that do not have matching NetworkLoginNames from the AreaAccess and Users tables, the NetworkLoginName from the AreaAccess table is displayed in the results window.

3. If names are found, run ScriptB in SQL Query Analyzer.

   Script B compares the Users table to the AreaAccess table, looking for close matches. It will match the NetworkLoginName from the AreaAccess table with the first or last names from the Users table. Script B will select:

   - The NetworkLoginName from the AreaAccess table, and
   - The FirstName, LastName, and NetworkLoginName from the Users table.
If the UsersNetworkLoginName from this query is blank, then no close match was found when compared against FirstName, LastName.

ScriptB

```
Select Distinct AreaAccessNetworkLogin = LTrim(RTrim(a.NetworkLoginName)),
UserFirstName = IsNull(LTrim(RTrim(u.FirstName)),''),
UserLastName = IsNull(LTrim(RTrim(u.LastName)),''),
UserNetworkLogin = IsNull(LTrim(RTrim(u.NetworkLoginName)),'')
From dbo.AreaAccess a with(nolock)
Left Join dbo.Users u with(nolock) on
( LTrim(RTrim(u.FirstName)) like LTrim(RTrim(a.NetworkLoginName))
or LTrim(RTrim(u.LastName)) like LTrim(RTrim(a.NetworkLoginName))
or LTrim(RTrim(u.LastName)) like
Substring(LTrim(RTrim(a.NetworkLoginName)),2,19))
Where Not Exists
(Select 1 From dbo.Users t with(nolock)
Where LTrim(RTrim(t.NetworkLoginName)) =
LTrim(RTrim(a.NetworkLoginName)))
Order By LTrim(RTrim(a.NetworkLoginName))
```

4. For each invalid record found, please complete one of the following options from within the Novar application.

- Remove (delete) any users that are invalid or no longer used, or
- Modify the current user’s NetworkLoginName to match the NetworkLoginName in the AreaAccess table, or
- Create permissions for a valid user in the Users table with an invalid NetworkLoginName in the AreaAccess table, or
- Create a valid user record to match the NetworkLoginName in the AreaAccess table.

5. When all modifications have been completed, run ScriptA again.

Run Script A to validate all user modifications have been made. If no results are returned, the mismatches between the Users and AreaAccess tables have been corrected.
Appendix D

Novar Database Information

This addendum provides Novar database information to help each site determine the optimum file sizes and settings needed for upgrading from one version of Novar to another.

If the Data and Log files are sized too small, the upgrade script will take longer because of the need to increase space during the processing. The Novar application will be forced to grow the files during processing, which can cause unnecessary bottlenecks.

Database Sizing Recommendations

- Data file(s) should have at least 15% available free space and have a growth rate of 128Mb.
- Total Log File sizes should be at least 25% of the size of the data file with a growth rate of 128Mb.
  - One log file is normally sufficient, unless multiple processors and parallel processing are being used.

**NOTE**

When upgrading from version 3.7 to the current Novar release, size the Log file to about 40% of the data-file size. This size will provide optimal performance during the upgrade. After the completion of the upgrade, the size can be reduced.

Database Settings

- Set **Auto Create** and **Update Statistics** to True.
- **Never** set **Auto Shrink** to True.

Temp Db Settings

- Set the total Data File size to approximately 10% of the Novar database size. (Run `exec sp_helpdb` to find the size.)
- Set the Log File size to approximately 5% of the Novar database size.
- Always set TempDb to **Simple Recovery** mode.
- Set **Auto Create** and **Update Statistics** to True.

**NOTE**

Set up the Model database with 10 MB space and Auto Growth value as True.
Appendix E

Activating AddOns After an Install

During the initial install of 6.0.x, users are allowed to specify which, if any, licensed AddOns to install / activate. By default, all licensed AddOns are pre-selected on the Novar Files to Install window. User may choose to clear any (or all) of the AddOn checkboxes to exclude them from the upgrade process.

For example, a site may not have completed its Adaptive Scheduling (AdS) testing when the decision is made to upgrade the production environment to release 5.13.2. During the install, the Adaptive Scheduling (AdS) checkbox is cleared. The upgrade then excludes the AdS files during the initial install.

Once AdS testing is completed and the site wants to activate AdS, it will need to follow this process to activate the previously excluded AddOn – as a separate / independent upgrade.

To activate an AddOn that was excluded during the initial install.

1. Log on using an Administrator* signon.
   *The Administrator must have full rights to Novar folders and to all the servers where the Novar application and database will reside.

2. Insert the Novar CD in the disc drive to automatically start the CopyNovar utility. The Welcome to the Novar Setup Wizard window opens.
   - If it does not start automatically, run CopyNovar.exe from the root of the CD.
   - If installing from a zipped CD image, unzip all the files to a temporary location and run CopyNovar.exe from there.
3. On the **Welcome to the Novar Setup Wizard** window, enter (or confirm) the **CD Key** value and select **Next**.
4. A list of the licensed AddOns for this site is displayed. Select **OK** to continue or **Cancel** – to abort the install.

The following Addons are included with the CD-Key that was entered. If these are not the AddOns expected, contact Novar Customer Support.

- Aces
- Adaptive Scheduling
- Ads Refresh (Auto)
- AutoLog (No Charge)
- AutoReconciliation (No Charge)
- Business Units
- Direct M/L
- Gatekeeper A/R Export
- Gatekeeper Contract Import
- Gatekeeper eBOX
- Gatekeeper Electronic Invoicing
- Gatekeeper Inventory Export
- Gatekeeper Matrix Data Export
- Gatekeeper Payment Import/Lockbox
- Gatekeeper Post Buy
- Gatekeeper XML2Novar (Auto)
- Interconnect External Revenue
- Interconnect Schedule Export
- LogAmalgamator
- LogMerge
- MIS System
- Novar Health Monitor
- PreemptMG Form (No Charge)
- RateCard (Auto)
- Remote Office MediaExec
- Remote Office RAS
- Remote Office RSS
- Report Management System
- Schedule Load Confirmation

**NOTE**: You will be prompted later in the installation for the specific AddOns you want to install.

The preceding screenshot is for illustration only. Additional custom add-ons may exist.
On the **Novar Environment to Upgrade** window, confirm the **Novar Environment** value and select **Next**.

Please enter the fully qualified path to the Novar environment to upgrade:

![Novar Environment to Upgrade window](image)

**NOTES:**
1. This is the location that includes the Install, Novar, TmpNet, etc. folders.
2. No changes will be made to this Novar environment at this time.
5. On the **Novar Configuration** window, confirm the following values and select **Next**:

- SQL Server Name [\Instance]
- SQL Database Name
- SQL Server User ID
- SQL Server Password (encrypted)

**NOTES:**
1. If you are using a clustered SQL Server, enter the SQL Server Network Name.
2. If you are using a Named Instance of SQL Server, enter SQL Server Name in the format: \"SQLServerName\NamedInstance\". Otherwise enter in the format: \"SQLServerName\".
3. Contact Novar Customer Support if you do not know the encrypted SQL Password.
6. On the Novar Database Upgrade window confirm the SQL Root Path and that the Database Upgrade Status shows Upgraded, select Next.
7. On the **New Novar Environment** window, confirm the **Novar Environment** value and select **Next**.

![New Novar Environment Window](image)

Please enter the fully qualified path to the new Novar environment you want to create/upgrade:

![Enter Path](image)

**NOTES:**
1. If specifying a drive letter, this MUST be the same drive letter used by Novar clients.
2. This is the location that will include the Install, Novar, TmpNet, etc. folders.
3. If you select the same location for your new Novar environment as your current Novar environment, the current Novar environment will be renamed with ".YYYYMMDD" appended to the name.
4. If you select a different location for your new Novar Environment and it is not empty, the new Novar environment will be completely erased.
5. No changes will be made to either environment without a final confirmation.
8. On the Novar Files to Install window:
   a. Clear the **Core Novar Files** checkbox in the **Select Items to Copy** section,
   b. Verify the AddOn to activate (such as Adaptive Scheduling) is selected
   c. Clear all other (previously activated) AddOn checkboxes in the **Select AddOns to Install** section.
   d. Select **Next**.

   ![Novar Files to Install window](image)

   **NOTE**
   - The **Message Center** section displays additional installation and progress information.
   - The preceding screenshot is for illustration only. Additional custom add-ons may exist.
9. A **Confirm AddOn Activation** dialog box opens. Select **Yes** to continue or **No** to return to the previous screen.

If Rush Pack or Incremental releases have been applied *since* the initial 5.15 install, a new dialog box opens.

![Confirm AddOn Activation dialog box](image)

- **a.** On the **Novar Environment Has Been Upgraded** window, enter or browse to the location of the latest Rush Pack that was used to update the Novar environment.

- **b.** Select **Next** to continue.

The system will now activate the selected AddOn *and also* automatically apply the appropriate rush-pack fixes for it.

10. On the **Final Steps!** window, review the information and select **Exit.**
Appendix F

Special Instructions for Updating Novar from Root

One of the CopyNovar steps is to make a backup of the current Novar environment before making any changes to it. To accomplish this, CopyNovar copies or renames the folder where the Novar Environment is located (such as copying "N:\Nvr514" to "N:\Nvr514_20091022" or "\\server_name\share_name\Nvr514" to "\\server_name\share_name\Nvr514_20091022").

CopyNovar then copies key configuration information from the renamed (backup) folder to the new environment. If the upgrade is canceled or fails, CopyNovar automatically restores the environment from this Backup folder. However, when the Novar environment is at the root of a drive or share (such as "C:" or "\\server_name\share_name"), the copy or rename processes won’t work because there is no folder to copy or rename.

Therefore during pre-install, the drive or share path must be modified to include a folder name. This must be done even when the users will be running Novar from a root drive or share.

Creating a Temporary Folder Path

⚠️ WARNING

CopyNovar cannot create or update a Novar environment that is a true root.
A true root = a physical drive that is shared (Drive E: is shared as "\\server_name\Novar514"). This type of configuration is not supported and any environment that was created this way will not be upgradeable. Please contact Imagine Communications Technical Support to discuss options.

To set up a temporary path in preparation for upgrading:

1. Log onto the server hosting the Novar environment.
2. Record the share permissions for the share to the Novar environment and remove the share such as:
   - Remove "NVR514" share from "E:\NovarEnvironments\Nvr514"
   - Remove "NVR514Test" share from "F:\Nvr514Test"
3. Create a temporary share to the parent folder (or drive) of the Novar environment such as:
   - Create "NvrTemp" share on "E:\NovarEnvironments"
   - Create "NvrTemp" share on "F:\"
4. Map a drive to the temporary share using the same drive such as:
   - N: = "\\server_name\NvrTemp"

These values will be used in several sections of the install.
Running CopyNovar

When prompted for the Novar Environment to Upgrade value, enter the path to the Novar environment using the drive or UNC created above such as:

- "\server_name\NvrTemp\Nvr514"
- "N:\Nvr514"
- \server_name\NvrTemp\Nvr514Test"
- "N:\Nvr514Test"

NOTE

Leave blank when creating a new environment.

When prompted enter the New Novar Environment.

- If doing an upgrade, use the same path that was entered above.
- Otherwise, enter the path to the Novar environment using the drive or UNC created above.

Upgrading Gatekeeper Contract Import AddOn

(Optional) If the Gatekeeper Contract Import AddOn is part of the upgrade, additional name changes are required. When CopyNovar opens the Gatekeeper Contract Import window, correct any paths as necessary such as:

- Replace “N:\ Nvr514\TmpNet” with “N:\TmpNet”
- Replace “N:\ Nvr514Test\TmpNet” with “N:\TmpNet”

Post-Install

Once CopyNovar completes, remove the temporary share that was created and restore the original share and permissions for the Novar environment.

Open the SecuritySetup.bat file in the Novar folder of the Novar environment in Notepad or another editor, locate the references to the temporary UNC created above and replace with the UNC used to access the Novar environment such as:

- "\server_name\NvrTemp\Nvr514 with \server_name\Nvr514
- "\server_name\NvrTemp\Nvr514Test" with "\server_name\Nvr514Test"
Troubleshooting

Contacting Support

Please contact Novar Technical Support with questions or problems during the installation.

- **Phone Number:** 303.476.5066
- **Fax Number:** 303.390.8100

Email Address: broadbandsupport@imaginecommunications.com
Install Verification Form

To: Client Support
    Imagine Communications
Fax: 303.390.8100

From: Title:
Company: Phone:

Software Installed: ____________________________

Date Completed: ____________________________

Comments:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

–Thanks for notifying us of your recent installation –