

# *TeleMagic Enterprise V4*

## Upgrade and Update Issues

*Following are important issues if you are upgrading or updating a previous installation of TeleMagic Enterprise to V4. Be sure to carefully read and observe these issues. You should also refer to the README.WRI file found in the \DOCS directory of the TeleMagic installation CD-ROM and the topic Upgrade Issues, found in TeleMagic's on-line help(accessible after TeleMagic is installed).*

### Before Upgrading

Any e-mail will be overwritten. Prior to upgrading, print out all e-mail messages for all users.

If you have moved your installation of TeleMagic, run the DBUTIL Path Update utility prior to upgrading. If you are not certain whether the installation has been moved, Path Update should be run as a precaution.

While running an upgrade no user should be in the program. The installation program will check for users and indicate that they should exit prior to commencing the installation. However, if a user attempts to enter the program after the installation has commenced, he or she will receive a "Cannot write to a read only file" error. Users should not attempt to access the program while an installation is in progress.

If all users are out of TeleMagic and you receive an Unable to Update File message during upgrade, one of the TeleMagic files has been left open on the network. (This can occur if users exit Windows improperly.) See your system administrator to clear the file from the network. (Having all users log off the network will clear all open files.)

A SET TEMP = statement must exist in your AUTOEXEC.BAT file and must point to a valid directory prior to installation. To find out what your current TEMP directory setting is, go to the DOS prompt and type the word "set". If the SET TEMP = statement does not exist, or you need to re-direct the path to your TEMP directory, open your AUTOEXEC.BAT file and add a new SET TEMP = statement, or change the existing statement to point to a valid directory.

If you have set any of your TeleMagic system files to read-only, you should set them back to full access before upgrading to V4. If you do not, you will receive a message during the upgrade asking if you would like to overwrite the existing file. If this message occurs, you must select Yes for the upgrade to be complete. Selecting No will result in those files not getting upgraded.

Prior to performing an upgrade, the location of the activity files for all users must be set to the global directory. The location of the activity files should be verified for each user and, if necessary, moved to the global directory. (The files can be moved back to their usual path after the upgrade is complete.) Additionally, you should make sure the upgrade program can access all databases. Verify that no users are storing databases on a local directory, or a network directory to which the user performing the upgrade does not have network security access.

Users of TeleMagic for Windows V1.0 who want to upgrade to V4 must first upgrade to V1.5a. The V1.5a upgrade is included on the CD-ROM for this purpose. After you have upgraded to V1.5a, you must open the V1.5a installation once to complete the setup procedure; then close the V1.5a installation. After that you can upgrade from V1.5a directly to V4. For complete instructions on upgrading to V1.5a from V1.0, see the file README.WRI in the path \UTIL\15UPG\DISK1.

If you are upgrading from V1.5 or later (including installations of V1.5a that you have just upgraded from V1.0), you must have opened the installation of TeleMagic at least once before performing the V4 upgrade.

Do not attempt to upgrade the Beta test version of V4 to the final version of V4. TeleMagic Technical Support will not provide any assistance for this type of upgrade.

A full database rebuild will be performed as part of the upgrade process. Make sure you allot sufficient time for the rebuild when performing the upgrade.

If you wish to upgrade using Data Synchronization Server, select the Send TeleMagic Upgrade check box for each remote site in Initialization Settings at the central site after the central installation has been upgraded. Make sure you unmark all other initialization settings, unless you intend to initialize those areas. (Performing an initialization with the other check boxes unmarked will upgrade TeleMagic without having any other affect on your data.) When you send the initialization packet, you should also send a copy of the file DSREMOTE.EXE for V4. This file is located in the path \UTIL\V4FILES\PROG on the CD-ROM. Copy this file to the global directory of your remote installations before processing the initialization packets.

DO NOT copy any files from your old installation of TeleMagic to the new V4 installation except documents or report files. Copying any other files from your old installation into V4 can cause serious damage to the installation. Contact TeleMagic Technical Support if you have any questions about this.

## After Upgrade

Data Synchronization Server is not upgraded along with TeleMagic. If you have Data Synchronization Server installed, perform the DSS upgrade following the TeleMagic upgrade.

Upgrades of installations prior to V4 will be set to Unregistered. When you launch an unregistered installation of TeleMagic after an update, you will be asked if you would like to register. Alternatively, you can select **Register...** from the **File** menu in TeleMagic. The Registration Help Wizard will launch and guide you through the registration process. If you need additional instructions during registration, press F1 to access on-line help.

Registration of TeleMagic must be performed with TeleMagic open. If you have upgraded remote sites through Data Synchronization Server, make sure that users at the remote sites have the Key Cards with the serial numbers for each site. You should also make sure that each serial number is unique. If you attempt to synchronize a site with a serial number that is in use at another site, the second site will become invalid.

If you are using an add-on product that is accessed from the TeleMagic menu, those menu option(s) may need to be reinstalled. Contact your TeleMagic reseller for assistance.

If you have upgraded from an installation of TeleMagic prior to V4, you must upgrade any node installations you have installed. On each workstation, select **Workstation Setup** from the **File** menu in TeleMagic. Search on Workstation Setup in TeleMagic's on-line help for further instructions.

## Issues for Upgrades from Installations Prior to V4

The DacEasy and TimeSlips links are not supported in the initial release of V4. When you upgrade, existing data will be retained but new information will not be synchronized with the other application(s).

Previously, pressing ALT+P on the keyboard would paste the current contact's address information to the clipboard. ALT+P will now open the Notepad dialog box. To paste contact information to the clipboard, select **Paste Contact Info to Clipboard** on the **Contact** menu, or press CTRL+P on your keyboard.

If you have changed the display order of your fields in the Browse window prior to upgrade, those changes will be lost. You must reset your browse display in V4.

Previously, when you opened TeleMagic from the program icon, the sample user TST would be automatically logged in. You were encouraged to add your own User ID and change the properties of the program icon to log you in automatically instead of TST. For new installations of V4, the TST user will no longer be automatically logged into TeleMagic; instead, the first user to log in after installation will have the opportunity of adding his or her own name and User ID. TeleMagic looks for the existence of no other users in an installation except the

sample user TST to determine if this is a first time login. If you have been using the user TST as your User ID, and TST is the only user in your installation, you will be required to enter login information (for a user other than TST) the first time you access V4. (You may continue to log in as TST if you desire as long as there is another user existing in TeleMagic.)

The file MERGE.EXE and its icon have been removed. The file TMFAX.EXE has been changed to TMAUTSRV.EXE and there is a new icon. If you had a MERGE.EXE or TMFAX.EXE icon on your desktop or program group, it will be removed on upgrade.

Upgraders need to open **Options, Preferences, Writing** preferences and enter the directory location where their documents will be stored in the Working Directory field.

Merge fields must follow the format FIELDNAME\_LEVEL. Merge fields in any document that use the LEVEL\_FIELDNAME format must be changed before they can be used with V4.

Cross-Level indexes are not supported in V4. When you upgrade, any cross-level indexes in your old installation will not be available for use. They will not be removed. These indexes will still appear on your index list when you open **Edit Indexes** from the **Contact Manager** menu. You will be able to edit these indexes to remove references to fields from all but one level.

The Screen Designer for V4 is fundamentally different from previous versions. In some cases fields on your screen may need to be adjusted slightly, in size and position, to present the same appearance as in your old installation.