

AutoNumber 4.0 to 2011 Upgrade

V1.0



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AutoNumber Installation on CRM 4

If you have AutoNumber 4 installed on your CRM 4 environment and will be upgrading to CRM 2011 it is necessary for you to do several steps before you move to CRM 2011.

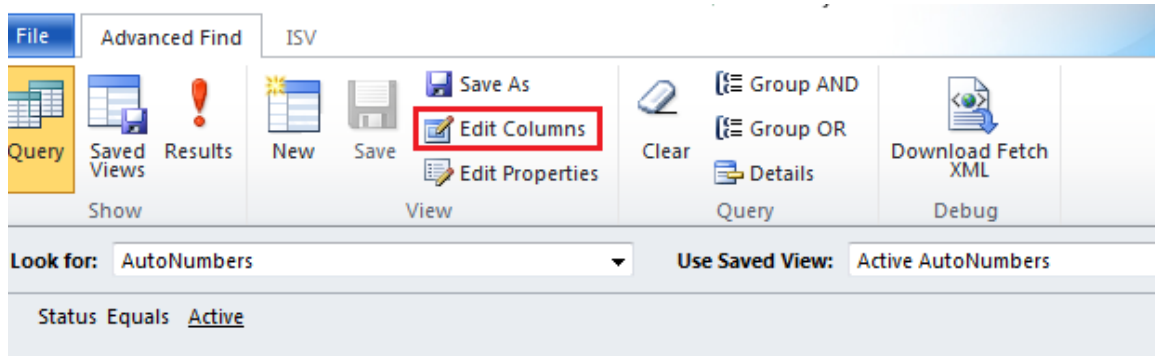
Most importantly AN4 for CRM 4.0 must be uninstalled before export the customizations file, move the database or do an inplace upgrade. AN for CRM 2011 requires new code and the old configuration will not upgrade.

The process is as follows:

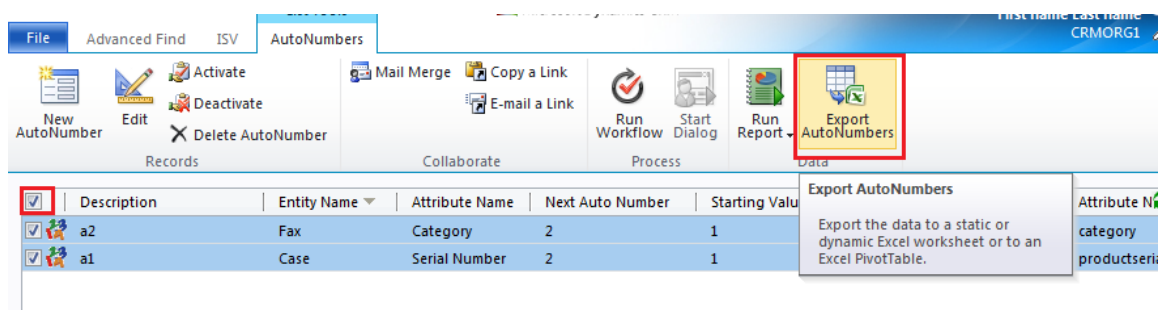
Backup old data

If there is AN data which you need to have in AN 2011 then perform the following steps to backup that data before uninstalling AN4 version.

1. Export AN entity records to a CSV file
 1. Create "Advanced find view" in CRM and add all the all columns from Edit Columns option to the view.

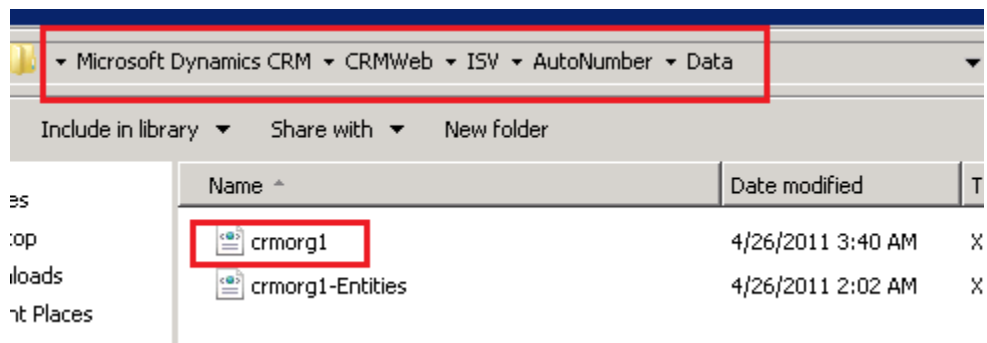


2. Run the view. Select all records and export the view result.



3. Save the file as xml file. Open xml file and then save it as ".csv" file.

- Copy [orgname].xml file from ISV\AutoNumber\Data\ folder



Remove AN 4 version

From Control panel add/remove uninstall AutoNumber. Once you have AN uninstalled you can then work with the CRM 4 customization file or the database.

You can now install AutoNumber 2011 – go to the AN 2011 Installation section in this document.

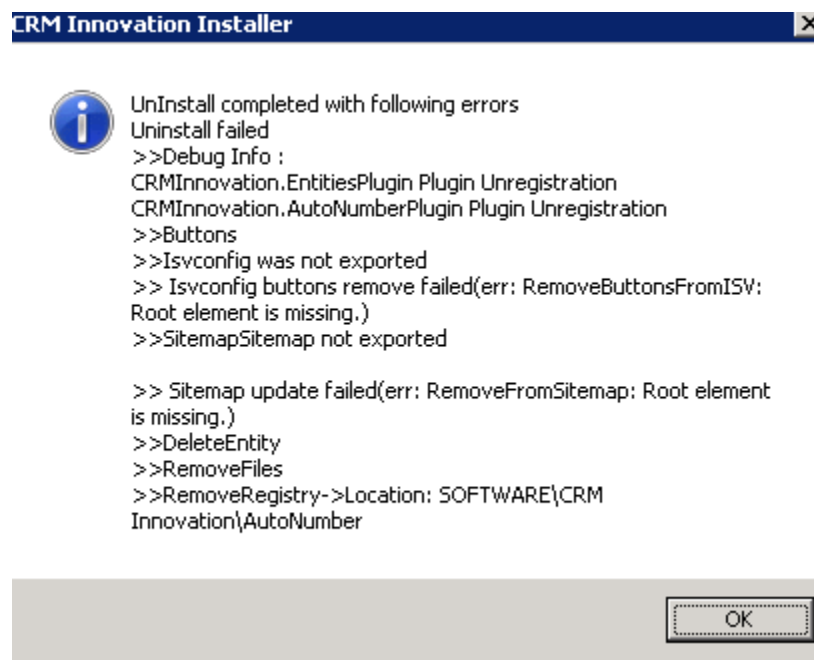
Upgraded to CRM 2011 without Uninstalling AN 4

If you did not uninstall AN 4 or it did not uninstall completely due to an issue in the uninstaller and you have already upgraded to 2011 then you need to follow the steps in this section.

1. If the uninstaller was run but didn't complete successfully then the uninstall will only remove the AN related physical files from below locations,
 - "server\bin\assembly"
 - "CRMWeb\ISV"
 - "CRMWeb\bin"

However, the customizations are still in CRM and they need to be removed.

2. Reinstall the AN.4 version but skip the AutoNumber Installer step as the customizations are already in CRM.
3. Once installation is completed now perform an uninstall step from add/remove. The uninstall will remove the customizations from CRM except the SiteMap and ISV config changes. It is likely and to be expected that the uninstaller will give you the following or similar error message about the ISV and Sitemap removal failing.

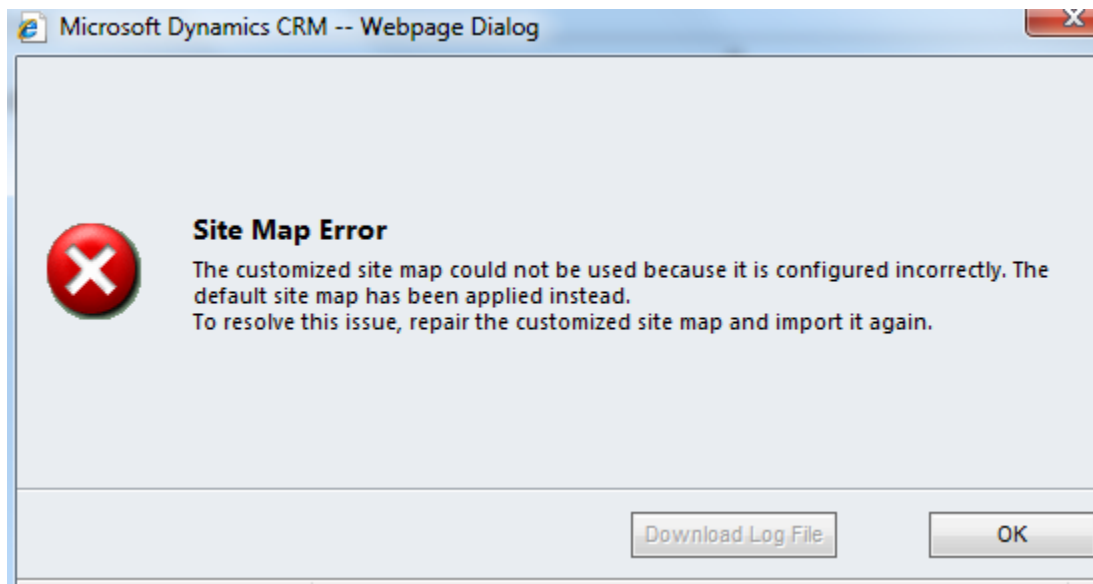


Depending on the results of the actions above it may be necessary to edit the customizations manually.

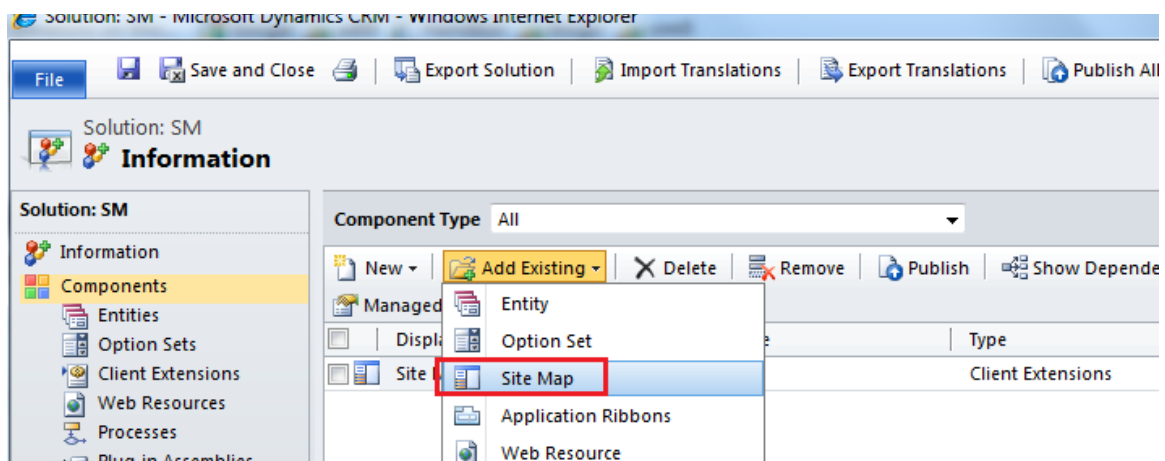
- i. Delete AutoNumber Entity from Customizations >> Customize the System >> Entities. Delete AutoNumber entity
- ii. Delete Registry entry for AutoNumber from on server
HKEY_LOCAL_MACHINE\Software\CRM Innovation

Removal of SiteMap and ISV issue

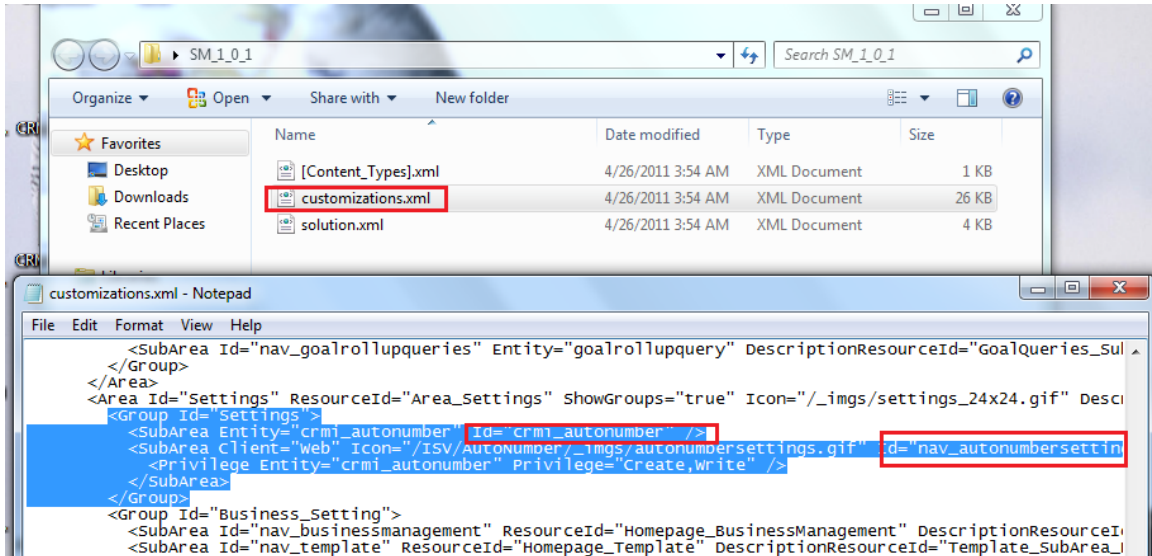
1. ISV change we not need to revert back as in CRM 2011 ISV is now converted as application ribbon and it exists on entity level. As we did not have AutoNumber entity in system currently (deleted by uninstaller), ISV changes not needed.
2. Sitemap changes: you will see below message after uninstall completes about sitemap error



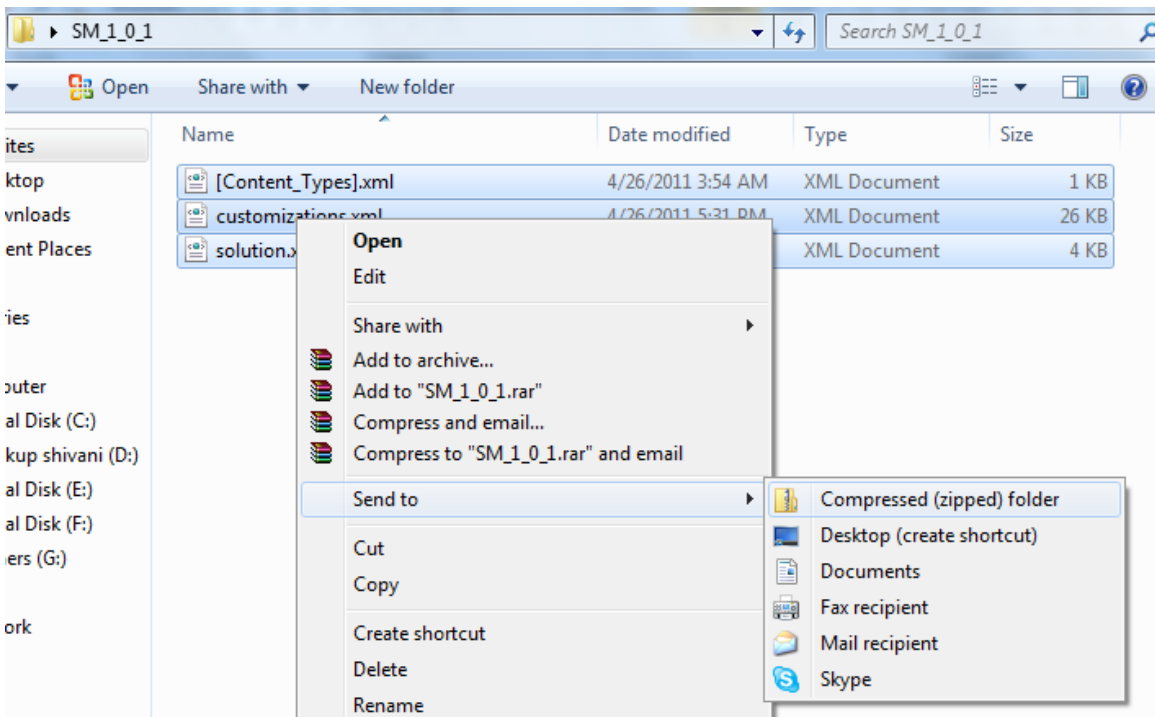
3. For this you need to create new solution which should only hold the SiteMap component.



- Export this solution as unmanaged solution. Extract the zip. Now open customization.xml file in notepad and remove the AutoNumber nodes as shown in the following screen shot. Search for “crmi_autonumber” and “nav_autonumbersettings”. These two nodes need to be removed from xml file.

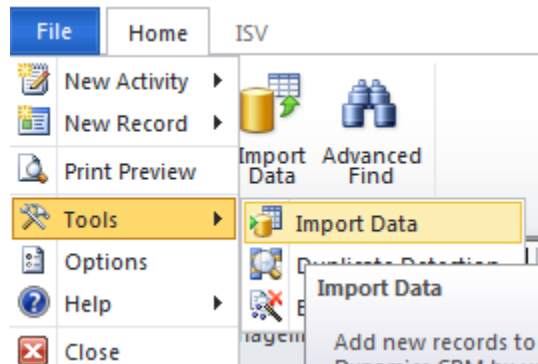


- Save Customization.xml and zip the all files. Import the newly created zip file back to CRM and publish customizations. This will resolve the sitemap issue.

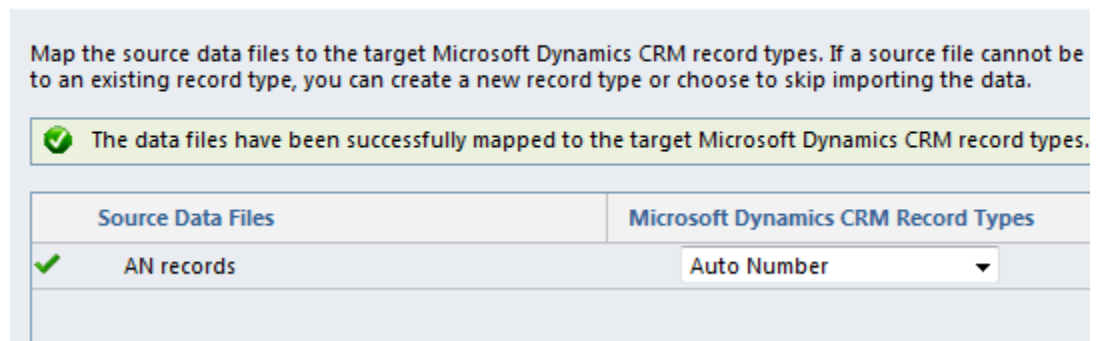


Install AN.2011

1. Install AN.2011 setup using the setup file available on our web server
<http://www.crminnovation.com/downloads.asp>
2. Note: you will also need a new license key which can be obtained by completing the trial request key at: http://www.crminnovation.com/free_trials.asp
3. Once installation completed then perform the following steps if you had AN data which you exported from the AN 4 environment.
4. Go to AN Settings page and publish all the entities
5. Now import the earlier backup csv file from Import utility of CRM. Go to File>> Tools >> Import Data.



6. Specify the earlier backup csv file. Go to Next steps, follow default settings and at step below choose record type as "Auto Number"

Map Record Types

7. Now in mapping step, you need to skip the mapping for below fields as shown in below screen shot,

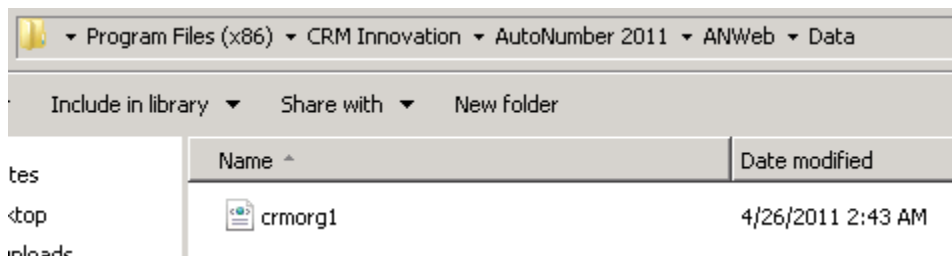
Note you will find duplicate entries for "Attribute Name" and "Entity Name" fields. Choose the first entry for first record and Second entry for second record. Just like as they appear in a sequence in drop down.

Attribute Name	⚠	Not Mapped
Attribute Name(2)	⚠	Actions
Autonumber Length	⚠	Not Mapped
Created By	⚠	Ignore
Created By (Delegate)	⚠	Create New Field
Created On		Fields
		Attribute Name
		Attribute Name
		Auto Number (Primary)
		CRM Attribute (Optional)
		CRM Entity (Optional)

8. Mappings to exclude:

CRM Record Types	Source Fields	CRM Fields
⚠ Auto Number	Required Fields	
	Not Mapped (Use Default)	CRM Attribute (Lookup)
	Not Mapped (Use Default)	CRM Entity (Lookup)
	Description	Description
	Increment	Increment
	Increment Direction	Increment Direction (Two Options)
	Starting Value	Starting Value
	Optional Fields	
	Attribute Name	Attribute Name
	Attribute Name(2)	Attribute Name
	Autonumber Length	⚠ Not Mapped
	Created By	⚠ Not Mapped
	Created By (Delegate)	⚠ Not Mapped
	Created On	Created On
	CRM Attribute	⚠ Not Mapped
	CRM Entity	⚠ Not Mapped
	Enable	Enable (Two Options)
	Modified By	⚠ Not Mapped
	Modified By (Delegate)	⚠ Not Mapped
	Modified On	⚠ Not Mapped
	Name	Name
	Next Auto Number	Next Auto Number
	Prefix	Prefix
	Preview	Preview
	Record Created On	⚠ Not Mapped
	Status	Status
	Status Reason	Status Reason

9. Proceed next and import the data.
10. Once import completed now you need to copy the orname.xml file
11. Copy the earlier backup orname.xml file to following location, note replace the earlier created file with your backup file



12. This completes the restore process. - Test AN in CRM 2011.