

Overview of SedonaOffice Upgrades 5x - 6x

02/08/2024 5:30 pm EST

- Initial Call with Coordinating App Support Specialist
 - Review this list and overall process
 - Itemize and Assess any concerns with the needed resources
 - Review Critical Highlights & advise contact w/ any required 3rd parties
 - Any questions regarding price/cost/quotes for SedonaWeb 2.0 or additional support work should be fielded via Sales before proceeding
 - Inquiries on installing to a test environment first also should be fielded via Sales
 - Inquiries regarding change log should be fielded via Customer Engagement - Get confirmation to send compiled list if not ready from Product Management
 - Establish On-Prem Subject Matter Expert/Sedona Admin
 - This will need to be someone in the company regular use of SO, SedonaSetup permissions, and able to disseminate the changes to staff
 - Schedule Dates for Pre-Data Check, Validation, Upgrade, Post Data Check
 - If possible, schedule to begin at or after your fiscal month end with a 72 hour buffer to complete all steps
 - Provide current list of Pre-Requisites and all necessary documentation
 - Sign Off/Approval on process
- Pre-Data Check
 - If all checks out -proceed to BackUp/Upgrade Steps
- Re-Validation that the accounts, system, and data is ready for upgrade
- Full BackUp of all production databases
 - Hosted customers have nightly backups that can be forced anytime
 - Enterprise customers must engage their IT or SQL Admin to create and store the required backups until upgrade is complete and normal business resumed
- Upgrade from 5x to 6.1.0.61 then Upgrade from 6.1.0.61 to 6.2.0.5
 - If using SedonaWeb 1.0 upgrade to latest ver 2.7.80.1 and run script WS_service Stored Proc Script
 - If using SedonaWeb 2.0 upgrade to latest ver 1.41.0.1 and run script WS_service Stored Proc Script
 - Install TLS Patch
- Post-Data Check
- Hand over back to Customer Admin to test their workflow
- Any workflow/how-to inquiries post-upgrade should follow normal case creation procedure via phone or email to

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