



Upgrading FACTS on NT/2000 Systems

The install CD contains all programs and files required to upgrade systems to the current version of FACTS.

The first section of this chapter outlines the conversion/upgrade procedures for users who are upgrading from FACTS 6.06 running on BBx or Vpro5.

The second section outlines upgrade procedures for users upgrading from FACTS 6.07.

The third section outlines upgrade procedures for users upgrading from FACTS 7.0.

Upgrading from FACTS 6.06

Before you begin

- Run all registers and have the customer complete a month-end.
- **Back up your data.**
- Make sure you have a copy of BBx4 or PRO/5 and that you can start it from the command line. Your current FACTS data must be running on at least BBx4 file format.
- Make sure the server and all PC stations are running 32-bit versions of Microsoft Windows. FACTS 7.1 does not support 16-bit operating systems.
- Make sure you have adequate disk space to run the conversion. We recommend that the server have enough disk space to accommodate **three** additional copies of the original FACTS data. At a minimum, there must be enough disk space to accommodate 1.5 copies of the data.
- Document any custom changes made to SMNAME, SMNAMZ, SMSLCT, SMFILE, and JSJOBS that the customer wants to carry over. They will be lost during the upgrade.
- Install FACTS 7.1 — refer to Chapter 4 “Installing FACTS on Windows/NT/2000 Systems.”
- Activate ProvideX. FACTS 7.1 utilizes a second activation key or package#, accessed through the Package button, in addition to the standard activation key. The Package# is 774, and you will find it's activation key on your FACTS authorization sheet.
- Apply the latest monthly update to the FACTS 7.1 system. Monthly updates are available on the Nexus at www.sofsol.com/extranet.

Installation procedures

1. Open Windows Explorer and navigate to the **Ssi6\data** directory.
2. Delete the following from the **Ssi6\data** directory:
 - the SU directory
 - the VF directory
 - All DO data files (DOFILB, DOFILH and DOVARI)
 - JSJOBS from ..ssi6\data\JS
 - SMFILE from ..ssi6\data\SM
 - SMGCTL from ..ssi6\data\SM
 - SMHELP from ..ssi6\data\SM
 - SMHLPR from ..ssi6\data\SM
 - SMMODS from ..ssi6\data\SM
 - SMNAME from ..ssi6\data\SM
 - SMNAMZ from ..ssi6\data\SM
 - SMSLCT from ..ssi6\data\SM
 - SMUHLP from ..ssi6\data\SM
 - SMUSED from ..ssi6\data\SM
3. Convert your data to ProvideX file format.
 - Create a temporary directory to hold the converted data files
Example: C:\ssi7\data.org
 - Remember or write down where the **ssi6** data files are located
Example: C:\ssi6\data
 - Start ProvideX: C:\ssi7\pvx\pvxwin32.exe
 - Change your current directory to pvx\lib_conv.bbx
Example: `cwdir "c:\ssi7\pvx\lib_conv.bbx"`
 - Start the conversion program by running **cv_nobbx** and answering the questions as follows:
 - ✓ Checkout Only: **No**
 - ✓ Full Path to BBx or Pro/5: **Enter the path, excluding the executable's name**
 - ✓ Variable Length Records: **Yes**
 - ✓ Eliminate Max Record Counts: **Yes**
 - ✓ Megabytes of Available Disk Space: **Be honest**

The SM terminal records will be deleted and automatically rebuilt by the new security system.

- ✓ Input Directory: **Path to the BBx data** (e.g., /ssi6/data)
- ✓ Output Directory: **Path to the temporary directory** (e.g., /ssi7/data.org)
- ✓ Log file name: **Name for file to hold warnings/error information**
- ✓ Log Errors Only: **No**

This starts the conversion process. When it finishes, the **C:\ssi7\data.org** directory should be populated with the ProvideX data files.

4. Copy the contents of **ssi7\data.org** into **ssi7\data**. This overwrites the FACTS 7.1 data files created during installation with your converted data files. You can delete the **ssi7\data.org** directory or you can keep it so you have a backup of the converted data.
5. Double click on the FACTS 7.1 Server shortcut icon on the desktop.
6. At the FACTS Banner Screen, click on the Software Solutions, Inc. logo and type **install**.
7. Select **Install Update/Add-on Module** from the Install menu.
8. Press **F1-Auto Update**.
9. Press **CR-Continue** at the next window.
10. Select the 6.07 Update level then type **Yes** to run the update.
11. In the Parameters box, accept the defaults.
11. When the update is complete, press **F3-End**.
12. Exit ProvideX and restart FACTS 7.1.
13. At the FACTS Sign-in Screen, click the Software Solutions Inc. logo and type **install**. Select System Control F/M from the menu and enter the ALF expiration date and make any other changes from your authorization code sheet.
15. Select Company F/M from the install menu and enter the FACTS 7.1 authorization codes.
16. Make sure you can successfully log into FACTS 7.1 using the FACTS 7.1 authorization sheet.

Before you allow users to sign into FACTS

Review the Colors tab in Terminal F/M (*System Management* → *File Maintenances* → *Terminal F/M*) for the T0 record. Make sure all the colors correspond to numbers, not letters.

Sales Order and Purchase Order Entry Options

For new FACTS 7.1 installs, a default record for all entry program types is included for both the Sales Order Entry Options F/M and Purchase Order Entry Options F/M.

For upgrades to FACTS 7.1, a default record for all entry types is included for the Purchase Order Entry Options F/M, but only a default record for quotes is included for Sales Order Entry Options F/M.

Bitmap Synchronization:

With FACTS 7.1, when new or updated bitmaps are released, they will automatically be copied to the client's workstation. There is a new version file in the _bmp directory, and FACTS checks the server's version file against the version file on the client's PC each time the user signs on. If they are different, the program copies all the bitmaps and updates the client's version file. While the copy is taking place, "Synchronizing Bitmaps—Please Wait" is displayed. You no longer need to manually copy the bitmaps to the WindX PCs.

Upgrading from FACTS 6.07

Before you begin

- Run all registers and have the customer complete a month-end.
- **Back up your data.**
- Make sure you have adequate disk space to run the conversion. We recommend that the server have enough disk space to accommodate **three** additional copies of the original FACTS data. At a minimum, there must be enough disk space to accommodate 1.5 copies of the data.
- Make sure the server and all PC stations are running 32-bit versions of Microsoft Windows. FACTS 7.1 does not support 16-bit operating systems.
- Document any custom changes made to SMNAME, SMNAMZ, SMSLCT, SMFILE, and JSJOBS that the customer wants to carry over. They will be lost during the upgrade.
- If you made any modifications to DOFILB, DOFILH, DOVARI, SMFMFM, SMGCTL or SMPRMT in FACTS 6.07, copy them to have a .MOD extension. Make sure you have the original unmodified versions of these files with .SSI extensions **and then run the Generate SMFLUP program.**
- Install FACTS 7.1 — refer to Chapter 4, “Installing FACTS on Windows/NT/2000 Systems.”
- Activate ProvideX. FACTS 7.1 utilizes a second activation key or package#, accessed through the Package button, in addition to the standard activation key. The Package# is 774, and you will find it's activation key on your FACTS authorization sheet.
- Apply the latest monthly update to the FACTS 7.1 system. Monthly updates are available on the Nexus at www.sofsol.com/extranet.

Installation procedures

1. Open Windows Explorer and navigate to where you installed FACTS 7.1.
2. Create a new folder under **Ssi7** called **data.org**. This is the directory where you will place your 6.07 data.
Example: C:\Ssi7\data.org
3. Copy 6.07 data into **ssi7\data.org**.
4. Remove any .NEW files from ssi7\data.org.

5. Remove the following files from **ssi7\data.org\SM**. Make sure you document any changes made to SMNAME, SMNAMZ, SMSLCT and SMFILE.

SMFIDS	SMNAME
SMFILE	SMNAMZ
SMFMFM	SMPRMT
SMGCTL	SMSLCT
SMHELP	SMUHLP
SMHLPR	SMUSED
SMMODS	
SMMSGS	

6. Remove SANSTK from **ssi7\data.org\SA**.
7. Remove the following files from **ssi7\data.org\DO**:
DOFILB
DOFILH
DOVARI
8. Remove JSJOBS from **ssi7\data.org\JS**. Make sure you document any changes made to this file.
9. Copy **ssi7\data.org** to **ssi7\data**.
10. Double click the FACTS Server shortcut icon on the desktop.
11. At the FACTS Banner Screen, click the Software Solutions Inc. logo and type **install**.
12. Select **Install Update/Add-on Module** from the Install menu.
13. Press **F1-AutoUpdate**.
14. At the next window, press CR to Continue.
15. Select **7.0 Latest Update** from the pick list. Press CR to Continue.
16. Accept the defaults at the Parameters box and type Yes to continue with the update.
17. Once the update is complete, press **F3-End**.
18. From System Control F/M, enter the ALF expiration date.
19. From Company F/M, enter the FACTS 7.1 authorization code.
20. Exit ProvideX and restart FACTS 7.1.
21. Make sure you can successfully log into FACTS 7.1 using the 7.1 authorization sheet.

Warning

If you cancel the upgrade process, **delete** the data directory, restore the data directory from backup and start the upgrade process from the beginning.

Do not copy data on top of a data directory that you started updating.

Systems with custom mods

Once 6.07 data has been converted, you must run the merge SMFLUP program to bring over any modifications made to the system.

To carry over modifications:

1. Type **UT** at the FACTS 7.1 Master Menu.
2. Select **Modification Support** from the menu.
3. Run **Merge SMFLUP**.
4. Enter filenames that are used to create the Exceptions and Changes files.
5. After completion, review the Exceptions and Changes files.
6. Run the string template generator if prompted.
7. Return to FACTS and begin testing the system.

Sales Order and Purchase Order Entry Options

For new FACTS 7.1 installs, a default record for all entry program types is included for both the Sales Order Entry Options F/M and Purchase Order Entry Options F/M.

For upgrades to FACTS 7.1, a default record for all entry types is included for the Purchase Order Entry Options F/M, but only a default record for quotes is included for Sales Order Entry Options F/M.

Bitmap Synchronization:

With FACTS 7.1, when new or updated bitmaps are released, they will automatically be copied to the client's workstation. There is a new version file in the _bmp directory, and FACTS checks the server's version file against the version file on the client's PC each time the user signs on. If they are different, the program copies all the bitmaps and updates the client's version file. While the copy is taking place, "Synchronizing Bitmaps – Please Wait" is displayed. You no longer need to manually copy the bitmaps to the WindX PCs.

Upgrading from FACTS 7.0

Before you begin

- **Back up your data.**
- Make sure you have adequate disk space to run the conversion. We recommend that the server have enough disk space to accommodate one additional copy of the original FACTS 7.0 data.
- Make sure the server and all PC stations are running 32-bit versions of Microsoft Windows. FACTS 7.1 does not support 16-bit operating systems.
- **If you made any modifications to the FACTS 7.0 metadata files then from your FACTS 7.0 system run the Generate SMFLUP program.**
- Rename your ssi7 directory to ssi7.org.
- Install FACTS 7.1 — refer to Chapter 4, “Installing FACTS on Windows/NT/2000 Systems.”
- Activate ProvideX. FACTS 7.1 utilizes a second activation key or package#, accessed through the Package button, in addition to the standard activation key. The Package# is 774, and you will find it's activation key on your FACTS authorization sheet.
- Apply the latest monthly update to the FACTS 7.1 system. Monthly updates are available on the Nexus www.sofsol.com/extranet.

Installation procedures

1. Open Windows Explorer and navigate to your renamed FACTS 7.0 directory.
2. Remove any .NEW files from **ssi7.org\data** directory.
3. Remove the following files from **ssi7.org\data\SM**.

SMANSR	SMMSGs
SMENTY	SMNAME
SMFILE	SMPRMT
SMFMFM	SMRPTS
SMGCTL	SMSLCT
SMINQY	SMTHLP
SMMODS	SMVIEW
4. Remove all files from **ssi7.org\data\DO**
5. Remove the help files from **ssi7.org/data/help**.

6. Copy **ssi7.org/data** to **ssi7/data**.
7. Double click the FACTS Server shortcut icon on the desktop.
8. At the FACTS Banner Screen, click the Software Solutions Inc. logo and type **install**.
9. Select **Install Update/Add-on Module** from the Install menu.
10. Press **F1-AutoUpdate**.
11. At the next window, press CR to Continue.
12. Select **7.1 Release** from the pick list and press CR to Continue.
13. Accept the defaults at the Parameters box and type Yes to continue with the update.
14. Once the update is complete, press **F3-End**.
15. From System Control F/M, enter the ALF expiration date.
16. From Company F/M, enter the FACTS 7.1 authorization codes.
17. Exit ProvideX and restart FACTS 7.1.
18. Make sure you can successfully log into FACTS 7.1 using the 7.1 authorization sheet.

Systems with custom mods

Once the 7.0 data is converted, you must merge SMFLUP and bring over any modifications made to the system.

To carry over modifications:

1. Type **UT** at the FACTS 7.1 Master Menu.
2. Select **Modification Support** from the menu.
3. Run **Merge SMFLUP**.
4. Enter filenames that are used to create the Exceptions and Changes files.
5. After completion, review the Exceptions and Changes files.
6. Run the string template generator if prompted.
7. Return to FACTS and begin testing the system.

Sales Order and Purchase Order Entry Options

For new FACTS 7.1 installs, a default record for all entry program types is included for both the Sales Order Entry Options F/M and Purchase Order Entry Options F/M.

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Bitmap Synchronization:

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