



# Upgrading FACTS on UNIX 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 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 2 “Installing FACTS on UNIX Environments.”
- Activate ProvideX. FACTS 7.1 utilizes a second activation key or package# 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](http://www.sofsol.com/extranet).

## Installation procedures

1. Log in as root.
2. Make sure TERM is set correctly for the type of terminal you are using.
3. Delete from your FACTS data set the following:
  - ➔ the SU directory
  - ➔ the VF directory
  - ➔ All DO data files (DOFILB, DOFILH and DOVARI)
  - ➔ JSJOBS
  - ➔ SMFILE
  - ➔ SMGCTL
  - ➔ SMHELP
  - ➔ SMHLPR

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

- SMMODS
  - SMNAME
  - SMNAMZ
  - SMSLCT
  - SMUHLP
  - SMUSED
4. Convert your data to ProvideX file format.
    - Create a temporary directory to hold the newly converted data file. You may want to *chmod 777* to set permissions.  
**Example:** /ssi7/data.org
    - Remember or write down where the Pro/5 data files are located  
**Example:** /ssi6/data
    - Start ProvideX: **/ssi7/pvx/pvx**
    - Change your current directory to the pvx/lib/\_conv.bbx directory:  
**Example:** *cwdir "/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**
      - ✓ 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 **ssi7/data.org** directory should be populated with the ProvideX data files.
  5. Copy **ssi7/data.org** to **ssi7/data**. You can remove **ssi7/data.org** if you want, or you can keep it so you have a backup of the converted data.
  6. Type **./FACTS7**
  7. At the FACTS Banner Screen, type **install**.

8. Select **Install Update/Add-on Module** from the Install menu.
9. Press **F1-Auto Update**.
10. Press **CR-Continue** at the next window.
11. Select 6.07 Update level.
12. In the Parameters box, accept the defaults.
13. When the update is complete, press **F3-End**.
14. At the FACTS Banner Screen, 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 menu and enter the FACTS 7.1 authorization codes.
16. Exit ProvideX and restart FACTS 7.1.
17. 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.
- 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 2, “Installing FACTS in UNIX Environments.”
- Activate ProvideX. FACTS 7.1 utilizes a second activation key or package# 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](http://www.sofsol.com/extranet).

### Installation procedures

1. Log into UNIX as root.
2. Make sure TERM is set correctly for the type of terminal you are using. If you are moving FACTS 6.07 data from media, mount the tape or CD drive.
3. Create a new directory called **ssi7/data.org**. This is the directory where you will place your 6.07 data. You may want to *chmod 777* to set permissions.
4. Copy 6.07 data into **ssi7/data.org**.
5. Remove any .NEW files from **ssi7/data.org**
6. Remove the following files from **ssi7/data.org/SM**. Document any changes made to these files.

SMFIDS	SMMSGs	SMUHLP
SMFILE	SMMODS	SMUSED

SMFMFM	SMNAME
SMGCTL	SMNAMZ
SMHELP	SMPRMT
SMHLPR	SMSLCT

7. Remove SANSTK from **ssi7/data.org/SA**.
8. Remove the following files from **ssi7/data.org/DO**:  
DOFILB  
DOFILH  
DOVARI
9. Remove JSJOBS from **ssi7/data.org/JS**. Document any changes you made to this file.
10. Copy **ssi7/data.org** to **ssi7/data**.
11. Type **/FACTS7** to run FACTS
12. At the FACTS Banner Screen, type **install**.
13. Select **Install Update/Add-on Module** from the Install menu.
14. Press **F1-AutoUpdate**.
15. At the next window, press CR to Continue.
16. Select **7.0 Latest Update** from the pick list and press CR to continue.
17. Accept the defaults at the Parameters box, and type YES.
18. Once the update is complete, press **F3-End**.
20. At the FACTS Banner Screen, type **install**. Select System Control F/M from the menu and enter the ALF expiration data.
21. Select Company F/M from the menu and enter the FACTS 7.1 authorization codes.
22. Exit ProvideX and restart FACTS 7.1.
23. Make sure you can successfully log into FACTS 7.1 using the FACTS 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 is 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.
- **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 2, “Installing FACTS in UNIX Environments.”
- Activate ProvideX. FACTS 7.1 utilizes a second activation key or package# 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](http://www.sofsol.com/extranet).

## Installation procedures

1. Log into UNIX as root.
2. Make sure TERM is set correctly for the type of terminal you are using. If you are moving FACTS 7.0 data from media, mount the tape or CD drive.
3. Navigate to your renamed FACTS 7.0 directory
4. Remove any .NEW files from the ssi7.org/data directory.
5. Remove the following files from **ssi7.org/data/SM**.

SMANSR	SMMODS	SMTHLP
SMENTRY	SMMSGs	SMVIEW
SMFILE	SMNAME	
SMFMFM	SMPRMT	
SMGCTL	SMRPTS	
SMINQY	SMSLCT	
6. Remove all files from **ssi7.org/data/DO**:
7. Remove the help files from **ssi7.org/data/help**.
8. Copy **ssi7.org/data** to **ssi7/data**.



9. Type **/FACTS7** to run FACTS
10. At the FACTS Banner Screen, type **install**.
11. Select **Install Update/Add-on Module** from the Install menu.
12. Press **F1-AutoUpdate**.
13. At the next window, press CR to Continue.
14. Select **7.1 Release** from the pick list and press CR to continue.
15. Accept the defaults at the Parameters box, and type Yes to continue with the update.
16. Once the update is complete, press **F3-End**.
17. At the FACTS Banner Screen, type **install**. Select System Control F/M from the menu and enter the ALF expiration date.
18. Select Company F/M from the menu and enter the FACTS 7.1 authorization codes.
19. Exit ProvideX and restart FACTS 7.1.
20. Make sure you can successfully log into FACTS 7.1 using the FACTS 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 is 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.