

Upgrading a Polling Dataset and it's Remote Locations

Further Clarification

The first thing to understand is the difference between an update and an upgrade.

Installing a version of System Five that is within the same major version number is an update.

For example:

- If the customer is on version 6.0.82.88, and you are moving them up to version of 6.0.82.208, that would be an **update**. The reason is that the major version numbers have not changed (6.0.82). only the minor version numbers have changed (from 88 to 208).

- If the customer is on version 6.0.82.88 and you are moving them up to version 6.1.0.xx, That would be an **upgrade**. The reason is that the major version numbers have changed (from 6.0.82 to 6.1.0).

The reason I am explaining the differences between an update and an upgrade, is that there are different processes that must be followed depending on whether you are updating a polling dataset, or upgrading it.



IF YOU ARE NOT SURE IF YOU ARE DOING AN UPDATE OR AN UPGRADE... GET CLARIFICATION FROM AN ADVANCED SUPPORT TECH OR A MANAGER.

DO NOT CONTINUE UNTIL YOU ARE SURE.

Updating a Polling Dataset

This is a simplified process because you are only updating the System Five executables, or binary files. No changes are being done to the database files. In this case simply upgrading System Five using the FTP Update on each location's server, will update System Five. This process can even be done while people are in System Five. However after the update, each workstation will need to exit System Five, and when they log back in, System Five should automatically synchronize itself with the version you just updated the server to. Because there isn't any data conversion taking place, the remote locations do not need to have their datasets re-created. However... I strongly recommend that the Bin folder and Data folder be backed up as a precaution. Even though the data will not be upgraded there may be new features or System Five registry changes that will occur. So you will want a backup in case you need to restore the customer back to their original configuration.

Upgrading a Polling Dataset

This process is much more complex, but absolutely **MUST** be followed when **UPGRADING** a polling dataset. Any time a data conversion takes place in the main location (Head Office) dataset, you **MUST** recreate the remote location's datasets. There isn't any other way. If you do not follow this process, you will corrupt the data.

Upgrading a multi-location install of System Five running S5Poll is much more complicated than upgrading a normal network installation of System Five. Each location running System Five must be running the same version. All outstanding import files must be read by exactly the same version of S5Poll. Because of these restraints, a special upgrade mode has been devised to facilitate the process. This process must be done in the order specified. A "behind the scenes" look has been added to allow for a manual upgrade or repair one that has gone awry.

Step 1 - Backup the Data and Bin Folders



ALWAYS! ALWAYS! ALWAYS! BACKUP THE BIN AND DATA FOLDERS BEFORE UPGRADING. THIS IS NOT STRONGLY SUGGESTED. THIS IS MANDATORY. NO EXCEPTIONS.

Additional things to back up from the remote dataset **BEFORE** replacing it with a new remote dataset.

Step 1A - Export all Remote location's Form Data if different from head office. If each location uses different invoice forms, Statement forms, Check Forms, etc. You **WILL** need to export all of these forms from the remote dataset prior to creating the new remote dataset, because when the remote is created from the head office dataset it will have all of head office's forms. Once the remote dataset is created and set up on the remote server, you will need to import all these forms and set them up in the invoice tree.

Step 1B - Export all Remote location's Label Form Data if different from head office.

Step 1C - Copy and Paste all Invoice Standard Comments to notepad if different from head office. Once the new remote dataset is set up they can be copied and pasted back in.

Step 1D - Export Highs and lows if different from head office. Highs and Lows will need to be exported in a report so that they can be re-imported into the new remote dataset.

Step 1E - Screen capture the Terminal Information because it will need to be re-entered in the new dataset.

Step 1F - Screen capture or record Video of all Invoice Tree / Printer configurations. Once remote dataset is re-created the remote will have the invoice tree and printer settings from head office. So The invoice trees will need to be re-created for all terminals in the new remote dataset.

Step 1G - Customer Points (Promotions) Do not poll. They will need to be exported from the remote dataset prior to creating the new dataset, and then data-loaded back into the remote dataset after it has been re-created. The process to do this is at the following wiki:

http://wiki.wws5.com/doku.php?id=polling_promotion_customer_points

Step 2 - Upgrading the Head Office

The next step in upgrading the version of System Five and S5Poll is to set the process in motion at the head office. Launch the Upgrade S5Poll command from the Utilities menu, as shown in Figure 1.

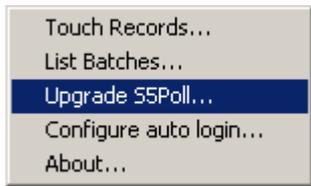
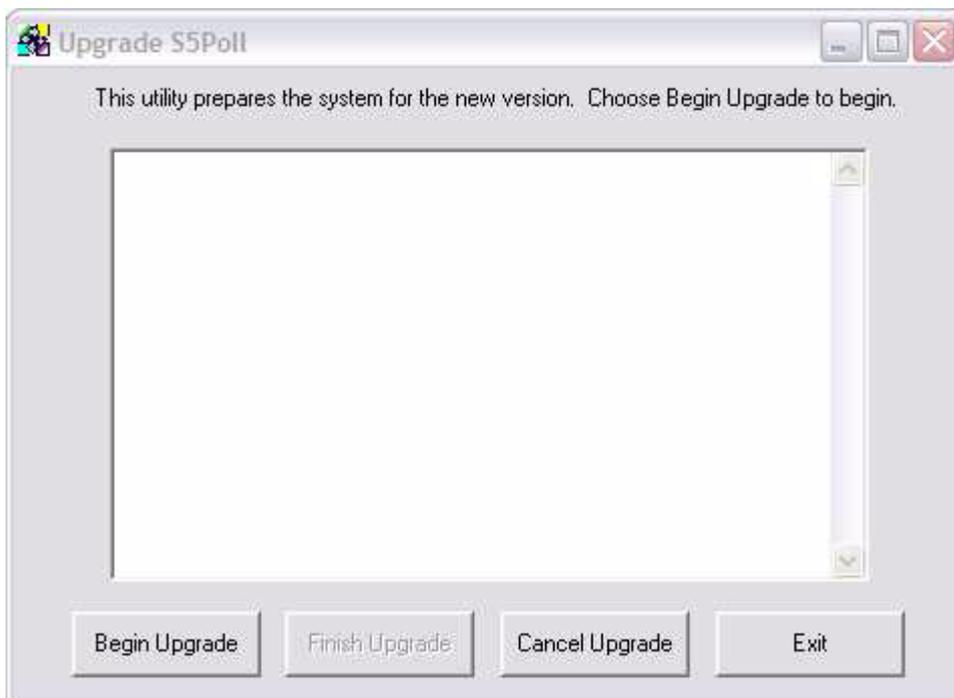
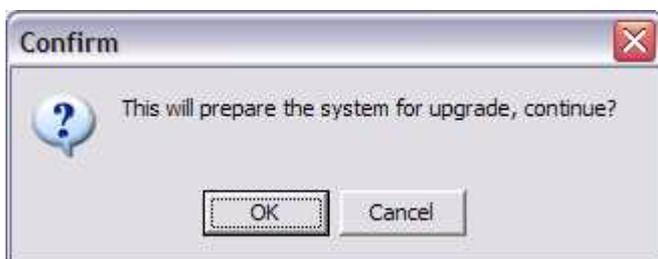


Figure 1: Launching the Upgrade

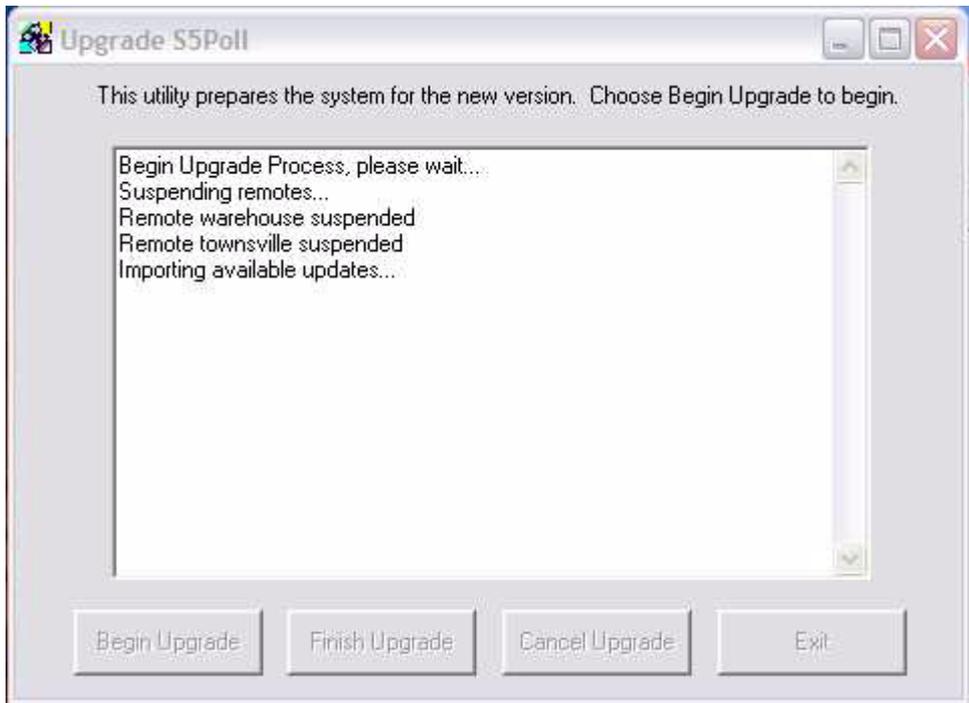
This launches the Upgrade S5Poll utility that guide you through the first stage in the upgrade process.



Click [Begin Upgrade] to start the upgrade process. A confirmation dialog box appears to ensure you wish to continue.



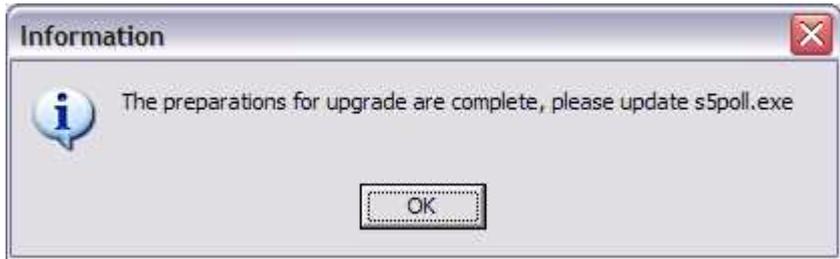
Click [OK] to close this dialog box and the process begins.



The first step is to create two files. POLLUP.NOW gets created and stays in the data directory until the upgrade process is completed. Its presence in the directory tells S5Poll that an upgrade is in progress. Certain buttons remain disabled during this time. A second file called POLLSUSP.NOW also gets created that is sent out to each of the Remote Servers update directories. The presence of this file causes the Remote Servers to suspend all further exports.

Once the Remote Servers have been suspended, the head office import all available updates from the Remote Servers.

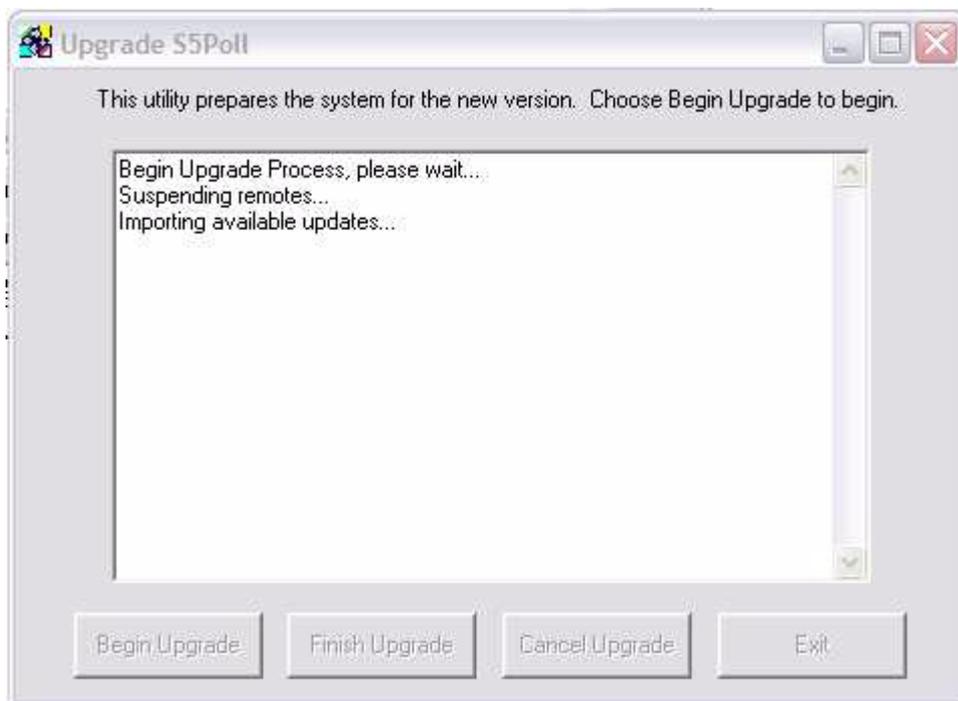
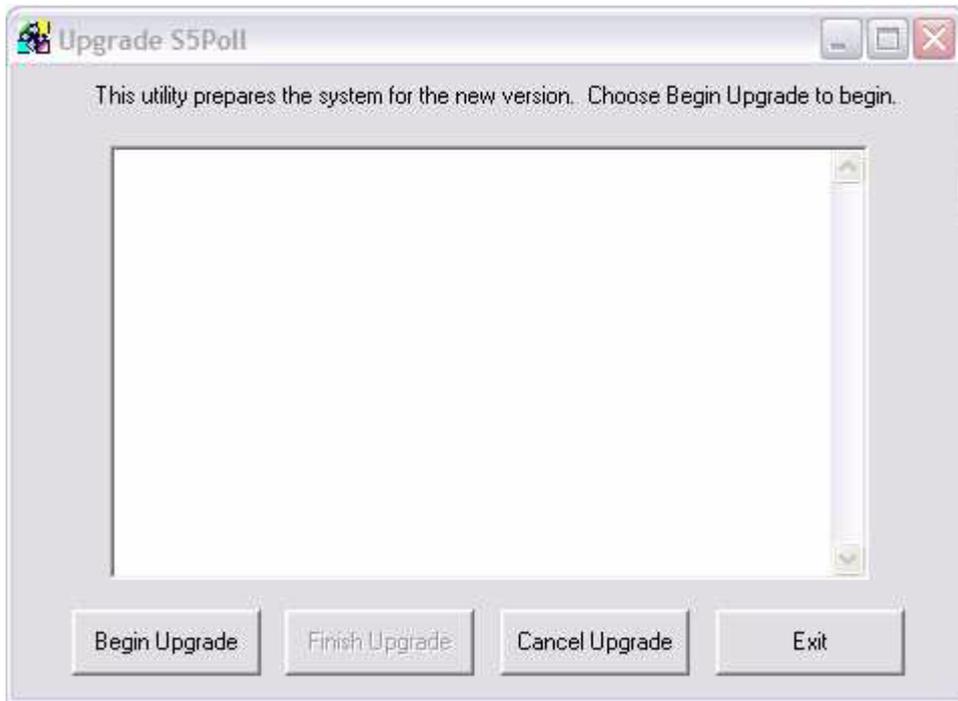
When completed a dialog box display and you are given an opportunity to quit S5Poll to upgrade. During this time System Five and S5Poll can be safely upgraded. All updates continue to be suspended because of the presence of the POLLUP.NOW file.



It is now time to complete the upgrade of the Remote Servers.

Step 3 - Upgrading the Remote Stores

Similar to the upgrading the head office, the remote stores are upgraded using the Upgrade S5Poll menu command of the Utilities menu. All sites should be running the same version of software. To check the current version of software, click [About]. Click [Begin Upgrade] to begin the process.

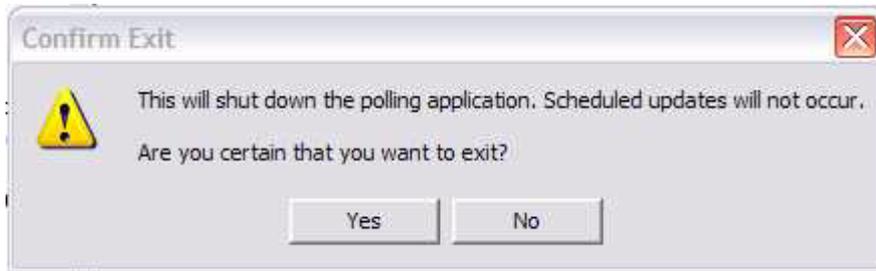


In this case there are no remotes to suspend so the process goes quickly.

Like the head office all available imports are processed.

Also like the head office the POLLUP.NOW file is created and stays in the data directory until the upgrade process is completed. Certain buttons remain disabled during this time.

You will be given an opportunity to quit. It is now safe to upgrade System Five and S5Poll for the remote location.



This same process must be done on each of the remote locations.

Step 4 - Re-create all the remote datasets.

At this point, the main location has had the executables all updated. Now you must open System Five to upgrade the main dataset to that version. Once that is done, restart System Five and log back in again to make sure that the dataset opens without any errors. Exit System Five and open S5Poll.exe. Click on Manage Servers... Select the head office location, and Click the edit button. Select the first remote location, and then click edit. Uncheck the "Created?" check box. You will get a confirm pop up warning you that if you do this you will need to recreate the remote dataset. Since this is what we are going to do, click yes to continue. Click OK to close the Remote Server Setup window. Now you will be back in the Active Server Settings window. Click on the Location Wizard button. Click Next. Now select the Remote Server that you want to re-create from the dropdown and click next. Choose where you want to save the new remote dataset to. By default it will save to the data folder on your main server, in a temporary directory called Location2. This is assuming that you are creating the second location. If you are creating the third location it will save into a temporary folder named Location3, etc. If you want to save the remote datasets somewhere else, browse to that folder and click Next. To accept the default folder, just click Next. Now the polling application will start copying the data files to your new location folder. Click Next. Once the file copy completes, you will get the System Five Install screen. You will need to import the System Five License Codes at this point so they will be installed into the new location. It is recommended that it be done at this point, otherwise you may have some difficulties applying them later. Once that is done, the next screen says Build Relationship Table. Click Next. Now all the remaining information will be exported to the new dataset, and the relationship table is being updated as well during this process. Finally you will be asked if you want to copy the file to the FTP. Depending on how big the dataset is, you may want to zip the new dataset up and copy it to another device like a DVD or a USB stick. If you want it zipped up and copied to the FTP automatically, then click the Copy To FTP button. Otherwise click the Finish button. The new dataset has now been created. Click OK to finish. This will bring you back to the Active Server Setup screen.

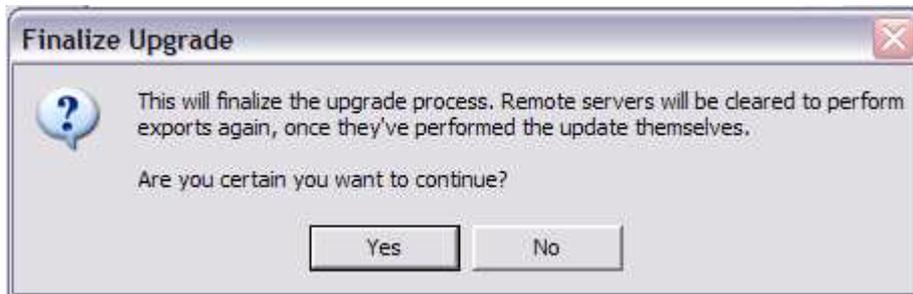
Now at this point you need to go back to the beginning of this step, and follow the same process to create all the remaining remote datasets. If you only have one remote dataset, then you can now continue on to Step 5.

Step 5 - Extract the new Remote Dataset or Datasets to their Remote Server(s)

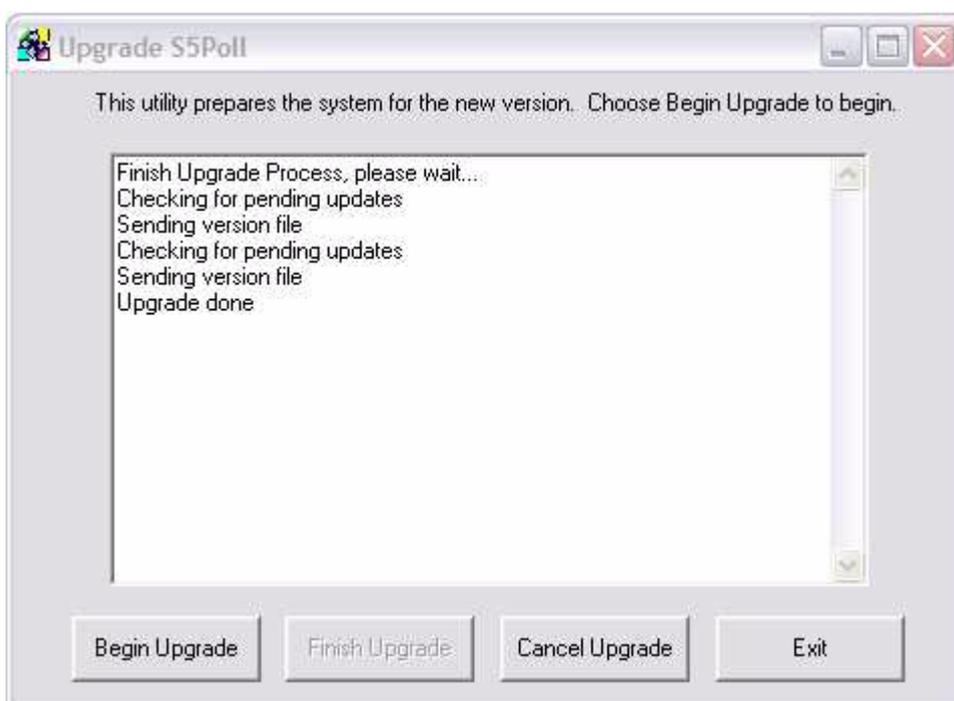
Now that the datasets have been created they have to be copied to the remote servers. This can be done by zipping them up and copying them up to the FTP, or if the datasets are quite large, they can be zipped up and sent to the remote locations on CD Roms, DVDs, USB Memory Sticks, or on External Hard Drives. Once the data has been copied to the servers, and extracted into the System Five Data folder, you should open System Five once to make sure the data is linked and is useable before continuing on.

Step 6 - Finishing the Upgrade - Head Office

Once the upgrade has been completed for all locations the head office upgrade can be finalized. This process removes the POLLUP.NOW file from the data directory, enabling the buttons again, as well as removing the POLLSUSP.NOW file from the update directories of the Remote Servers. This process is started the same way as the upgrade process by choosing the Upgrade S5Poll... menu item. But this time, choose the Finish Upgrade button instead of the Begin Upgrade button.



Click [Yes] to finalize the procedure.



This process ensures each remote location has no pending import files. "Checking for pending updates". An import file that has not been processed stops the release of the POLLSUSP.NOW file for the remote location. This must be processed prior to the upgrade of the remote location and head office. This should not have happened however because the upgrade process of the remote location should import all available.

A version file is now sent to the remote locations called pversion.txt that contains the version of the new polling program for head office. This ensures that the remote location is running the same version as head office.

Once this process is finished, the POLLSUSP.NOW file is removed from the remote locations update directory allowing the exporting to continue.

The update of head office is now complete. The POLLUP.NOW file is removed from the data directory allowing full function of S5Poll.

Step 7 - Finishing the Upgrade - Remote Store

Each remote store must now complete the upgrade process. By this time the version of System Five and S5Poll be have been updated but the POLLUP.NOW file is still in the data directory suspending all updates. Choose the Upgrade S5Poll command again and click [Finish Upgrade]. The POLLUP.NOW file should now be removed from the data directory and polling can resume.

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