

Upgrade21

Upgrading halFILE 1.4/2.0 to 2.1

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halFILE 1.4/2.0 to 2.1 Upgrade Utility

This document describes how to upgrade halFILE sites to version 2.1. This process handles only those sites currently on version 1.4 or 2.0. If you are on a prior version, please contact technical support.

Before You Start

1. **BACKUP EXISTING HALFILE INSTALLATION.** On tape, a copy elsewhere on the network, etc. Also, IF AT ALL POSSIBLE, I recommend getting all baskets empty & archived before upgrading. It will make the transition smoother, and will help in setting up autoarchive later. If not, that is fine, UPGRADE21 will handle it.
2. If any halFILE databases are in the Microsoft Access platform, migrate those to SQL Server first, then perform the upgrade steps.

Running Upgrade21.exe

1. Create a NEW program folder for the 2.1 install, preferably in a similar location to the previous install (i.e., if the old path was at F:\HFW14SQL\, make the new path F:\HALFILE\).
2. Run the 2.1 setup CD, changing the installation path to this new folder.
3. Copy the halsys.lic file from the license folder on the installation CD into this folder.
4. Copy the UPGRADE21.EXE program in the Upgrade21 folder on the installation CD into the new program folder.
5. Run the UPGRADE21.EXE program.
6. In the first text box, place the full Path and Filename to the existing installation's PARAMTRS.MDB file (i.e., F:\HFW14SQL\PARAMTRS.MDB).
7. Click the button that says Check Current Setup. If the path is correct, and the program has access to the MDB file, it will fill in the ListBoxes below with the information. If it does not do this, check the path and try again.
8. Confirm the paths in the second and third text boxes. They should have been filled in automatically by the program.
9. Click the button that says Configure SQL Database Setup.
10. In the screen that appears, fill in the name of the SQL Server, the UserID and Password to connect to the SQL Server, and select the SQL Server Driver from the list. Click Exit, and then say YES to save the changes.
11. Back at the UPGRADE21 screen, click the First GO button. This will make an initial connection to the SQL Server, confirming your setup on the previous screen. If it fails, go back and check your CREATEDB set up by clicking the Configure SQL button again.
12. Once the database connection is confirmed, you should be able to walk through the process step by step (the buttons will enable as you go down the list). Click each one, EVEN IF THEY DO NOT USE THAT ITEM (i.e., Pending). This will create all of the tables properly for each subsystem.
13. If you have a problem on one item, Click the View Log Button. This will pop up the upgrade log, and you can scroll to the end to see what it was doing. If you can figure out the problem, fix it, then go

back in and finish the upgrade (you can click the enable steps button to enable all, so you can start farther down the list).

If you can't figure out the problem, contact Technical Support.

14. Once the upgrade program finishes successfully, you should be able to run HFW20.EXE from the new folder and have access to everything from the old system. Once it is functioning, **RENAME THE OLD HALFILE.EXE PROGRAM EXECUTABLE, SO NO ONE WILL INADVERTENTLY GO INTO THE OLD SYSTEM.**
15. Run the 2.1 setup on each workstation (**only run UPGRADE21.EXE once**), and make sure there are no old shortcuts on desktops or start menus pointing to an old install.