



# **Manufacturing Management Software**

## **Upgrading Guide**

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# Upgrading

This section guides you through the upgrading of an existing installation to a newer version of the software.

The process is largely automatic and experienced users will have no difficulty performing it even if they have not read this guide.

There are two stages to the process. Stage 1 is loading the new software onto your computer. This will take only a few minutes. Stage 2 is upgrading your data to accommodate the changes in the new version. How long this takes will depend on the size of your database and the number of changes involved. For large systems, this can take several hours. It is an unattended operation, so once it's started you can leave it to it.

**IMPORTANT:** You must have administrator privileges within *Windows*™ to upgrade your system. Make sure you are logged-in to *Windows* as a user that has administrator privileges.

## 1 Upgrading from a CD

If you are upgrading the software from a CD, place the CD in your drive and after a few moments you will see a screen like this:



If this screen does not appear, the auto-run feature on your PC may be disabled, to proceed in this case find the setup program on the CD and double-click on it.

To begin the upgrade process, check the **I have an existing installation...** option, click **Next**, then click on the **Install Match-IT** button and continue from Loading the new software below.

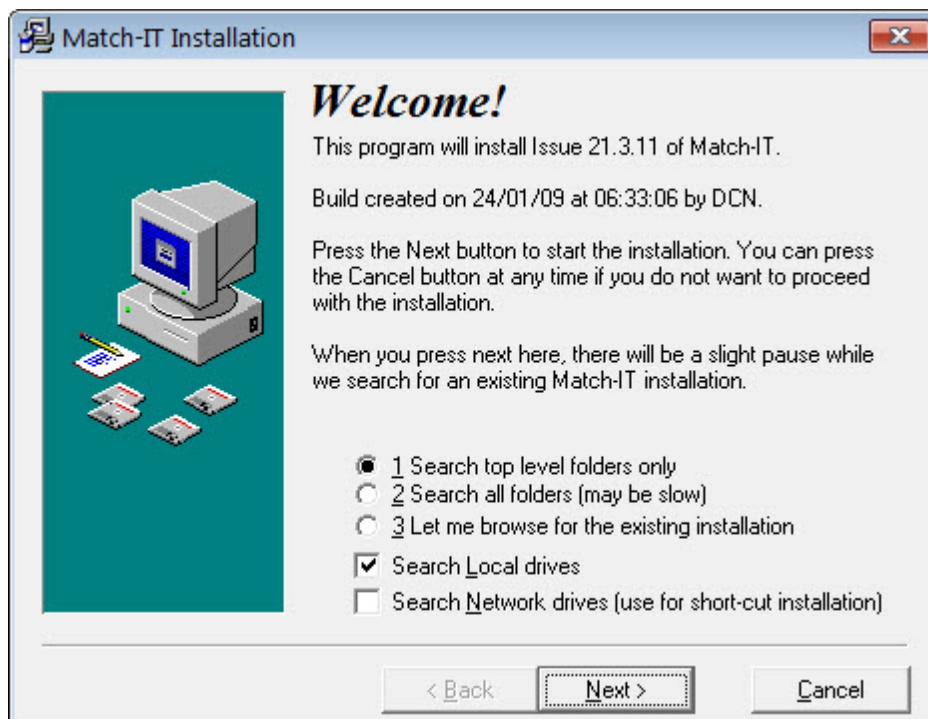
It's a good idea to review the release notes before upgrading. You can read those directly from the CD by selecting the **Read Release Notes** button. This will describe the most significant changes in the new version.

## 2 Upgrading from a download

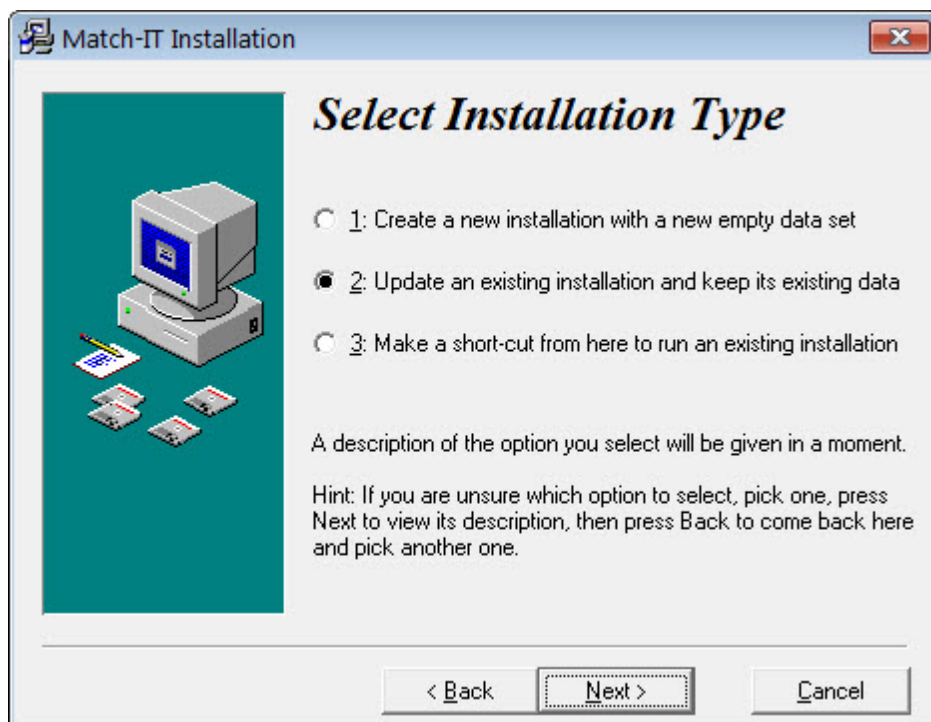
If you are upgrading from a downloaded copy of the software, to start the upgrade process, run the program you downloaded. You can do this by either finding it in explorer and double clicking on it, or by selecting Run from the Start button. Then continue from Loading the new software below.

## 3 Loading the new software

After starting the installation program there will be a slight pause then you will see a welcome screen something like this:

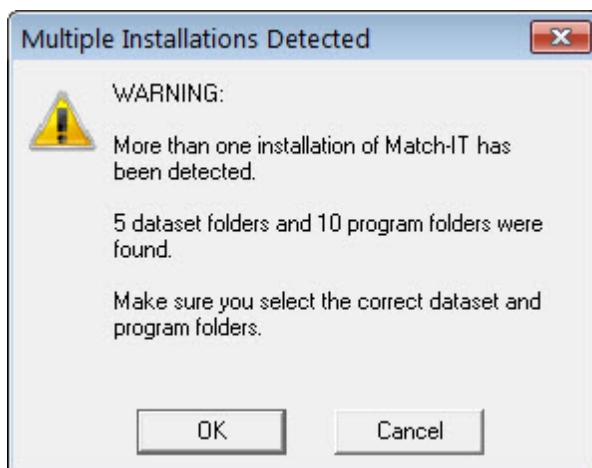


Press **Next** to proceed with the installation. The installation program will search your local disk for an existing installation. After it's done the search you will see a screen something like this:

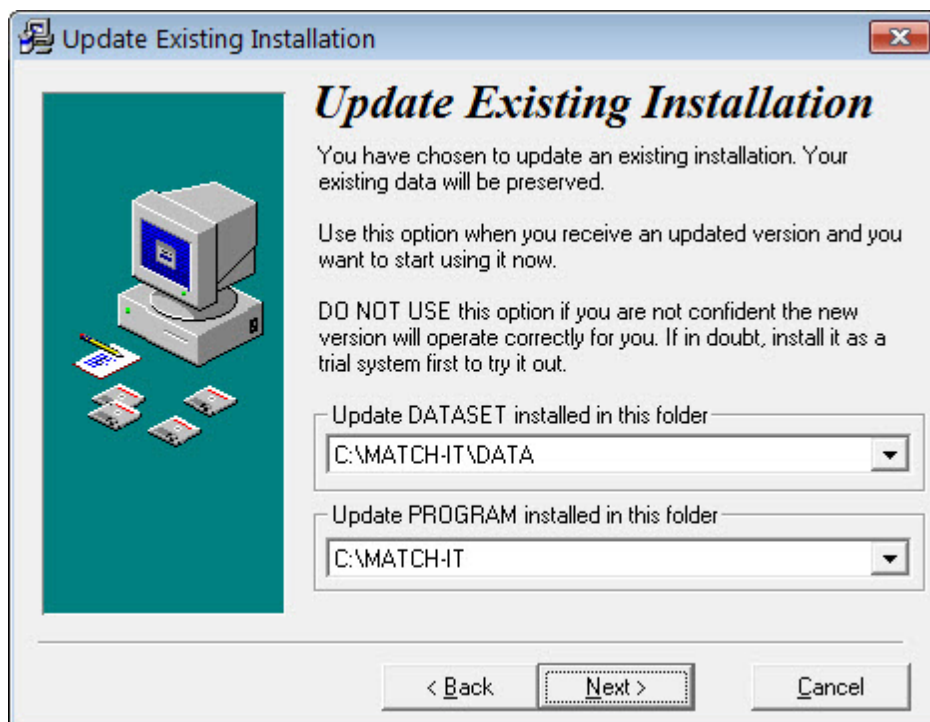


If your existing installation was found, option 2 to update an existing installation, will be selected. If your existing installation was not found, go no further. You must install the new version from a workstation that can see your existing system. The best place to do this from is your server. To do that, cancel this installation and start again on your server.

Make sure option 2 is select and press **Next**. If there is more than one installation available, you will get a warning similar to this:

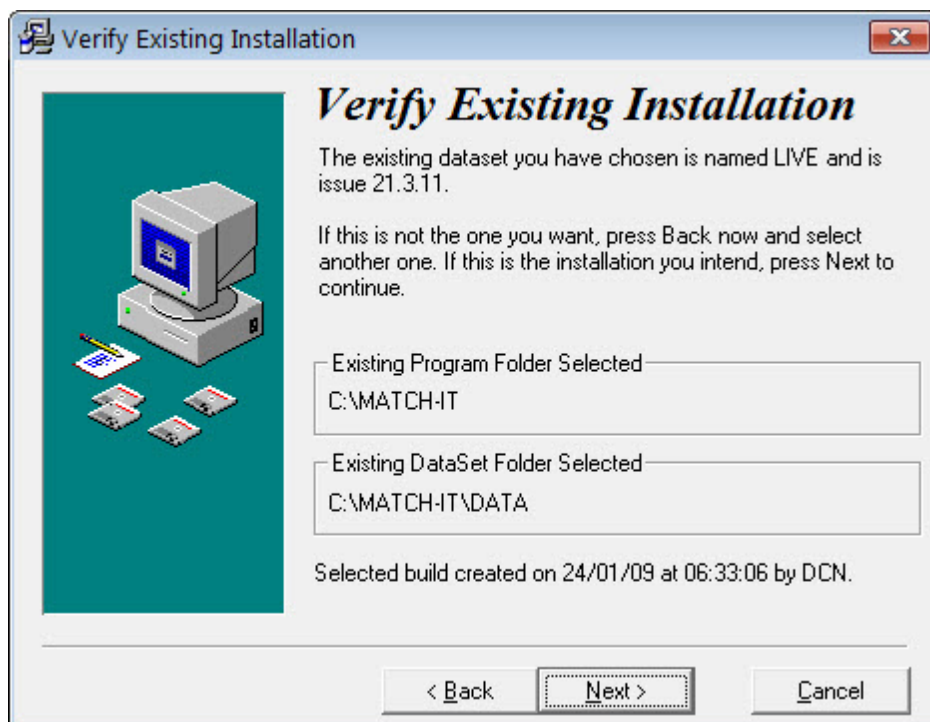


Make sure you select the installation you wish to upgrade in the next screen. Press OK if you get this warning. The next screen you will see will be something like this:



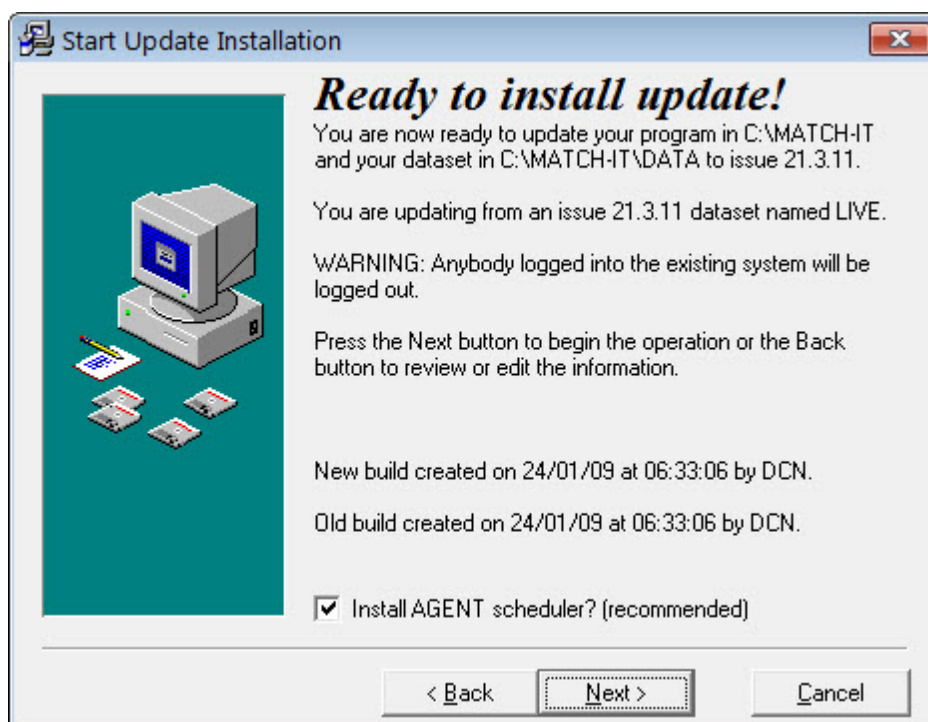
The **DATASET** folder shown should be the place where your Match-IT data is held. The **PROGRAM** folder is usually the parent of the data folder unless you have organised your folder structure in a non-standard way. In this case refer to your system administrator.

If you have more than one Match-IT installation on your system, the folder offered may not be the correct one. In this case, click on the drop-down list and select the correct installation. Make sure both the DATASET and PROGRAM folders are correct, then press **Next**. You will see a screen something like this:



Confirm the details shown are correct. If they are not, press **Back** to return to previous screens and change your selections. If they are correct, press **Next**. You will see a final confirmation screen like this:

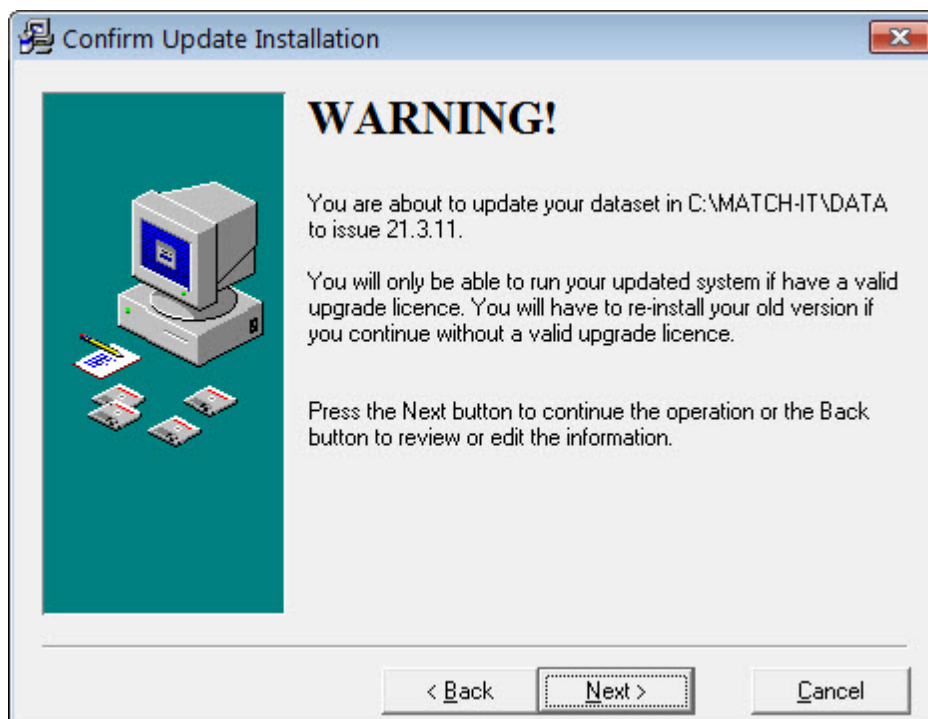




Make sure the details shown are correct, and then press **Next**.

The **Install AGENT scheduler?** option should only be checked if you are performing the upgrade from the same PC you are using to run the 'Agent', this is typically your server. In all other cases this option should be un-checked.

Next, you will see a final confirmation screen like this:

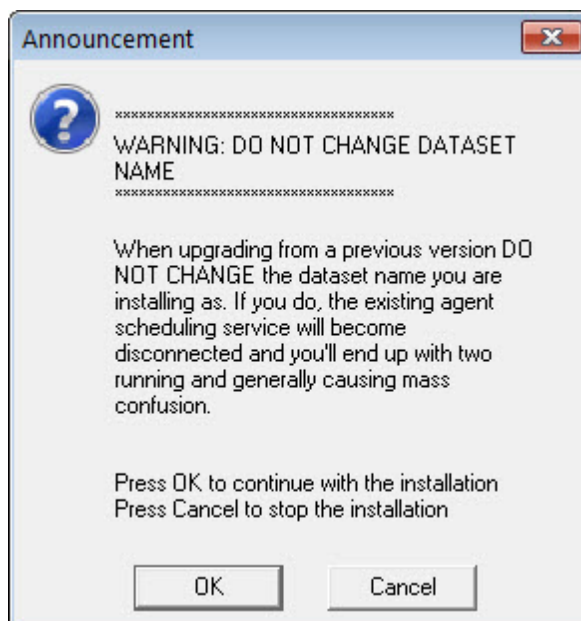


This is just warning you that you will not be able to run the new version of the software if you have not got a valid upgrade licence. This is your last chance to cancel without side-effects.

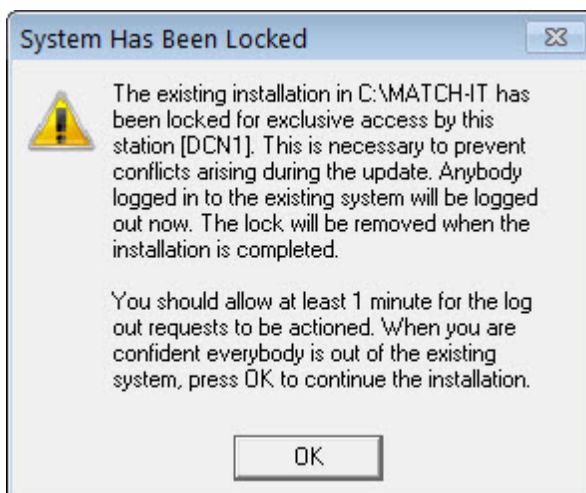
**IMPORTANT:** Although the new software will install without a valid licence, you will not be able to run it.

If you find you've done this, you must revert to your previous version by re-installing that from the CD.

When you are ready, press **Next** to begin the installation. Depending on the upgrade you may receive an announcement message, please read these. Here is an example:



Press **OK** on any such message you receive. After a few moments you will receive another message like this:



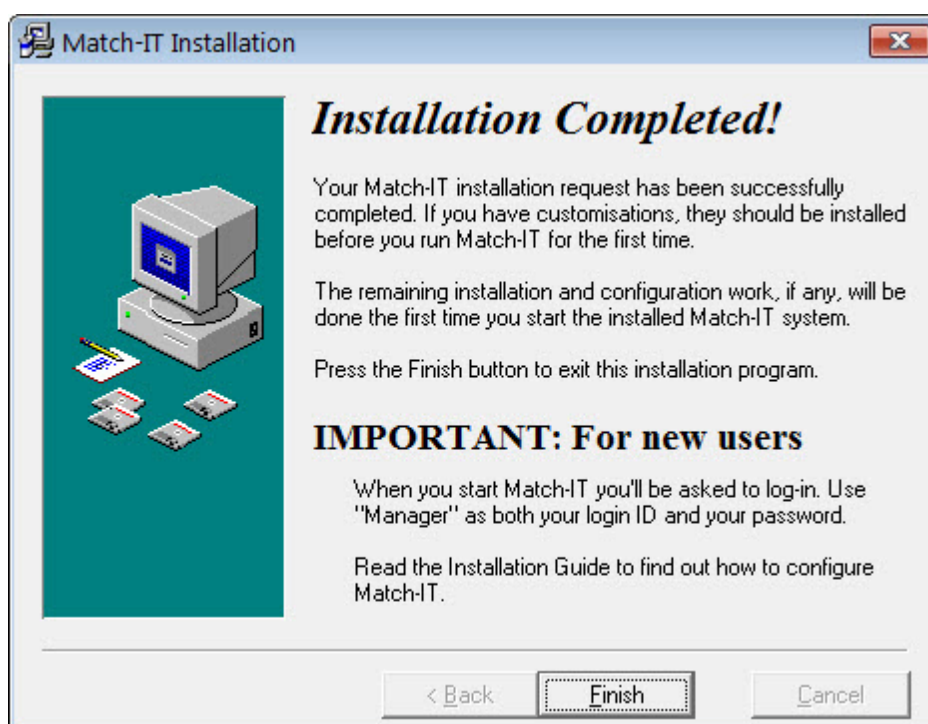
This is advising you that the system has been locked to prevent its use during the installation. If anybody is currently using the existing system, they will be logged out automatically within 1 minute. If you are not sure if anybody is using the existing version, just wait 1 minute then press **OK** to continue.

You will then be asked to confirm that nobody is using the existing system with a screen like this:



When you are sure nobody is logged-in to the existing system, press **OK**.

The new software will now be installed on your system. The process will take only a few minutes. When it has completed you will see a screen something like this:

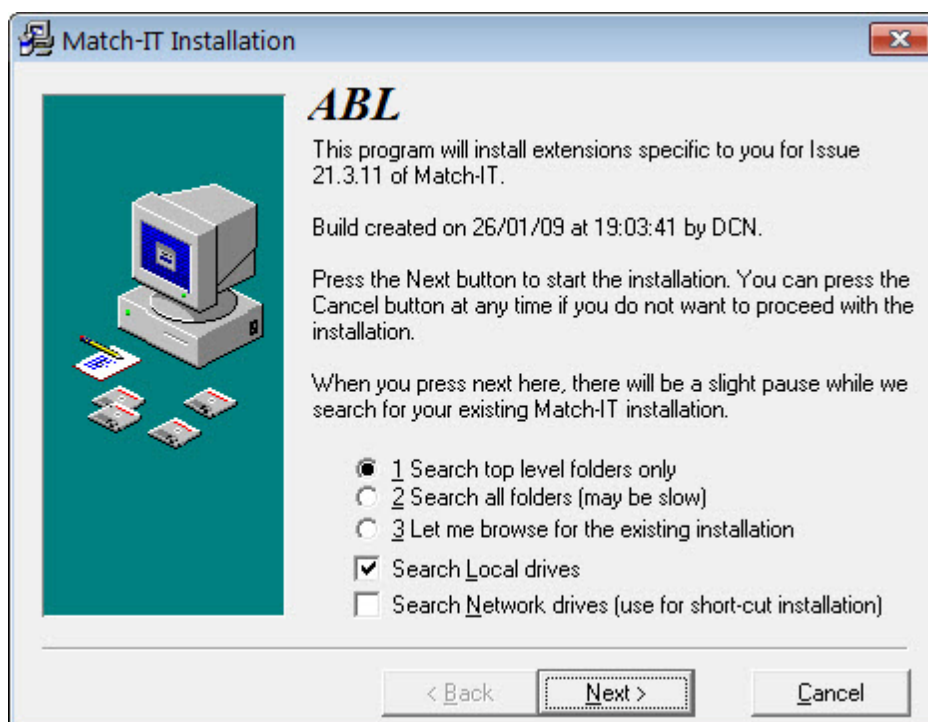


Press **Finish** to exit the installation program.

## 4 Loading your customisations

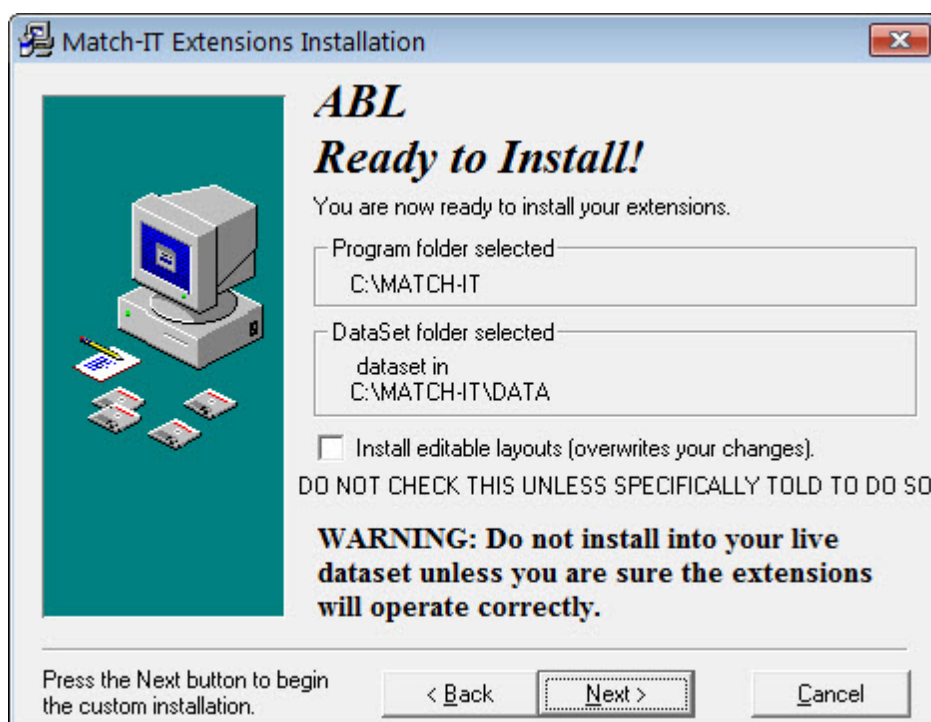
If you have special customisations and extensions to your system, they must be loaded (or re-loaded) after you install any new version of the software and before you run it.

If you are upgrading from a CD that has your customisations on it, the CD will show your customer ID and the **Install Customisations** button will be available. In this case, verify the customer ID is you and press the **Install Customisations** button to begin the process. If you've been e-mailed your customisations, just run the program you've been given. Either way, you'll see a screen like this:



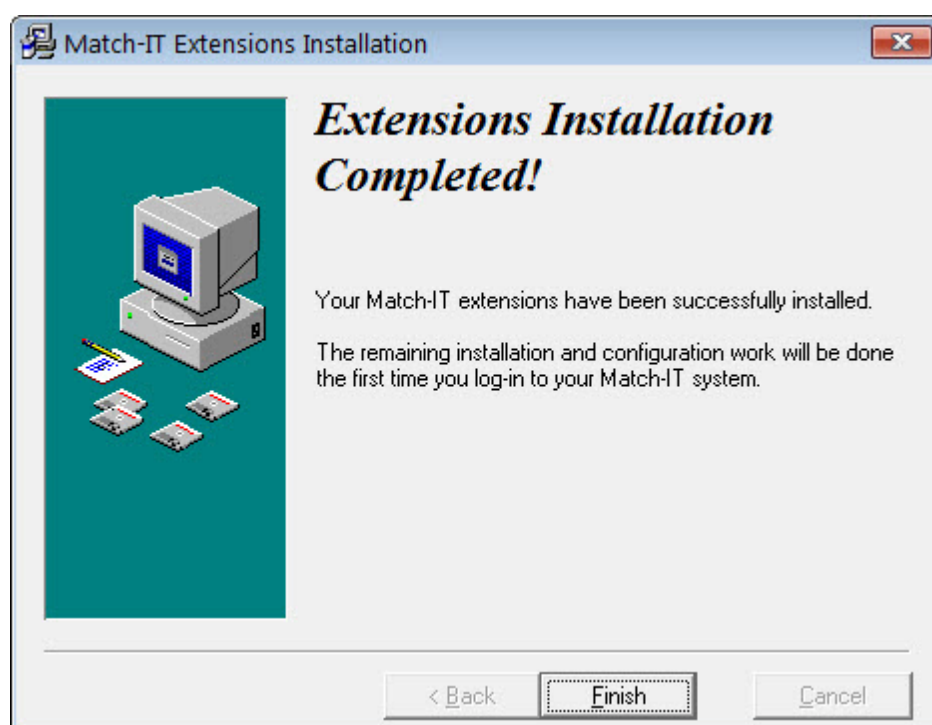
The process is very similar to installing the original Match-IT software except it only asks for a PROGRAM folder. You must verify the correct PROGRAM folder is selected. It must be the same as that selected for the original software installation.

The final confirmation screen looks like this:



Note the **Install editable layouts** option. Leave this off unless you are expecting revised layouts from your Match-IT supplier. If you check this option, layout changes you've made may be overwritten. When ready, press **Next** to install your customisations.

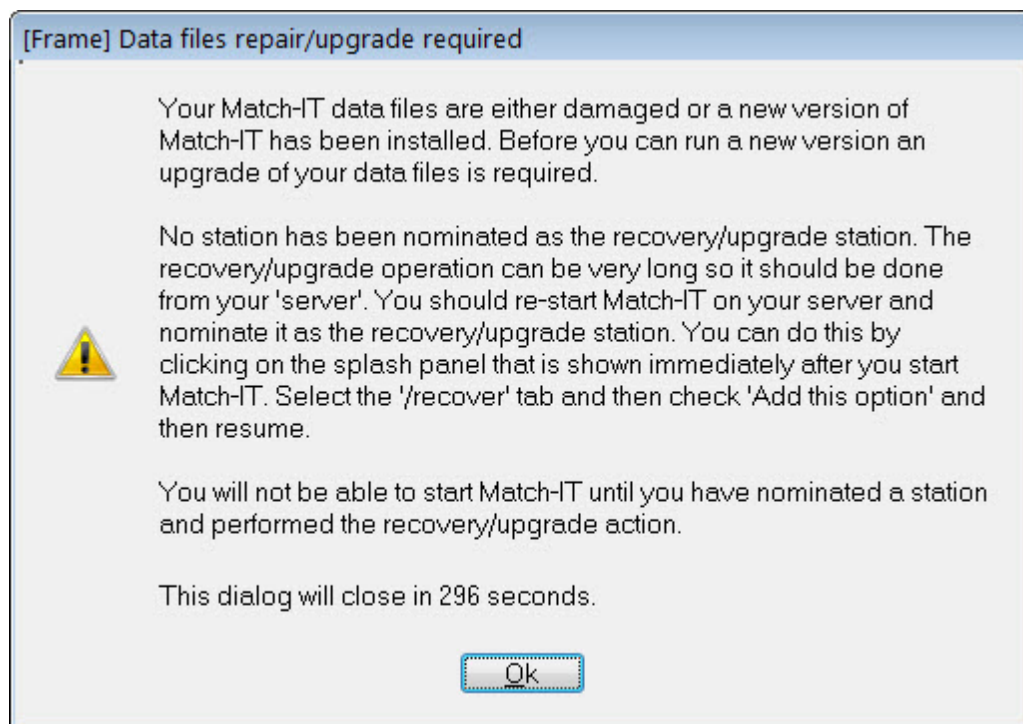
Installing customisations is usually very quick. The final screen you will see will look like this:



## 5 Initialising the new software

Initialisation of the new version is automatic the first time you run it. Start the upgraded system in the normal way to begin. It's best to do this from your server as the upgrade can be a very lengthy process.

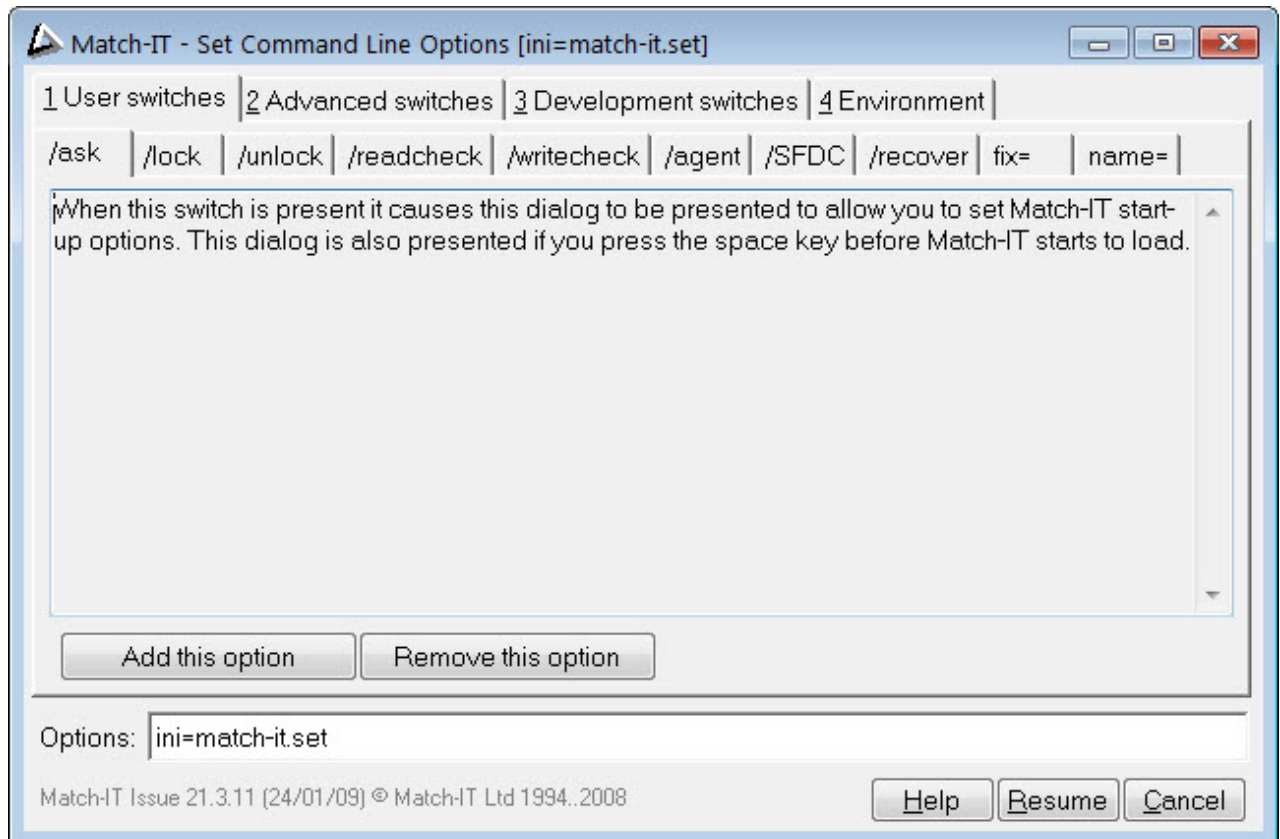
You will see the usual splash panel appear. After a short pause, the system will begin to load. The first time it starts after an upgrade it will notice it's a new version and will automatically initiate the upgrade process. This converts your data from the old version to the new. If this is the first time you have installed an update you may see this screen:



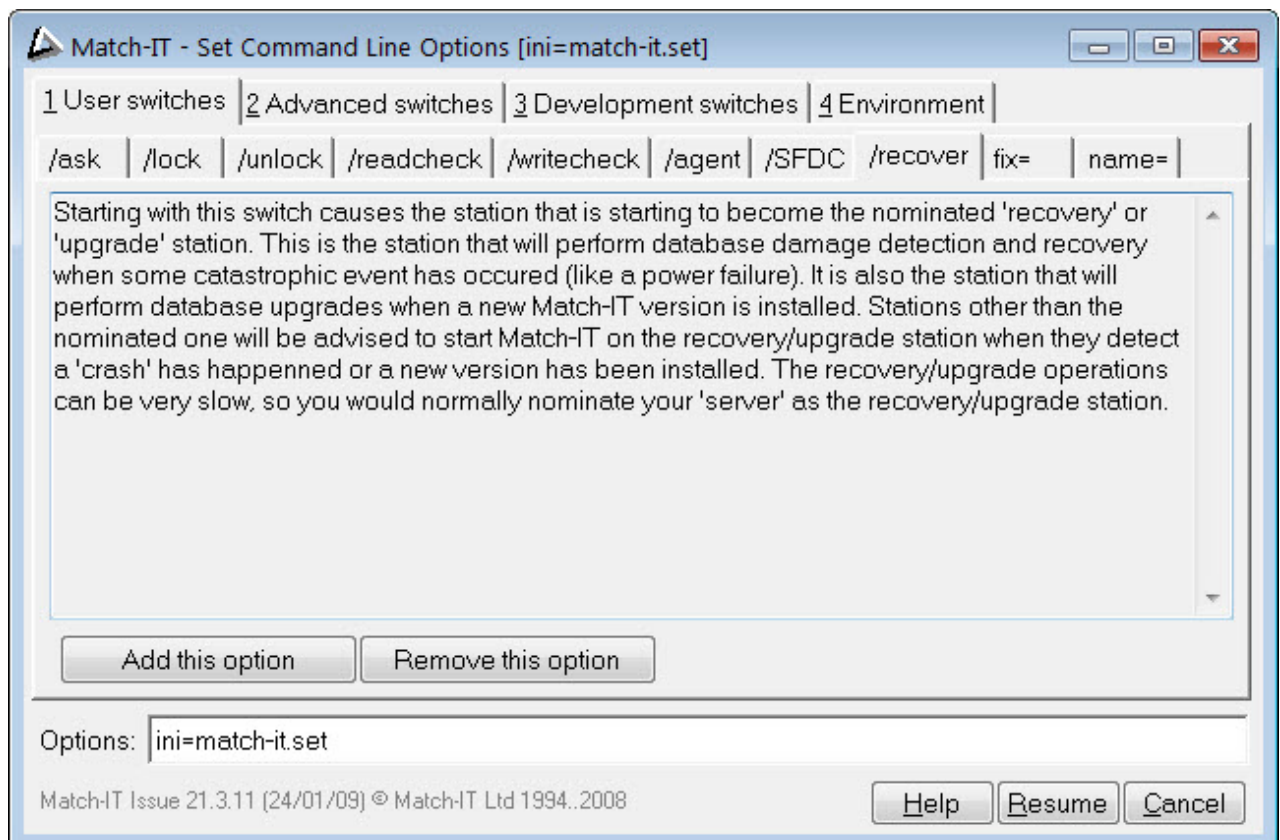
This is normal. It just means you haven't nominated a station to perform the upgrade.

To nominate a station, press **OK** on the above message, this will stop the software. Start it again, and when you see the initial splash panel appear, click anywhere on it. This will bring up a screen like this:



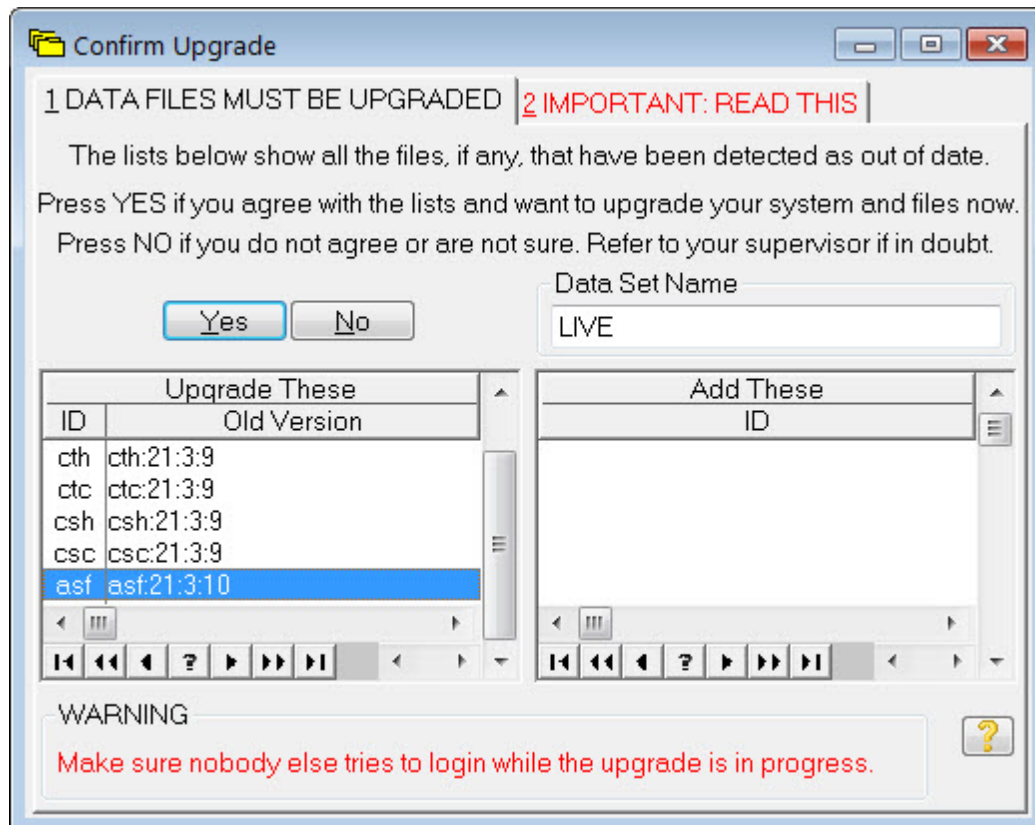


Select the **/recover** tab, the screen will change to:



Then press the **Add this option** button, this will add the option to your options line, then press **Resume** to continue loading.

During the loading the system will detect all the data upgrading that is necessary and after a few moments you will see a screen similar to this:



The list on the left will show all the existing databases that must be converted to the new version. It may be empty if the new version has not changed the format of any databases. The list on the right shows any new databases that are required for the new version. This is usually empty. Adding new databases is relatively rare.

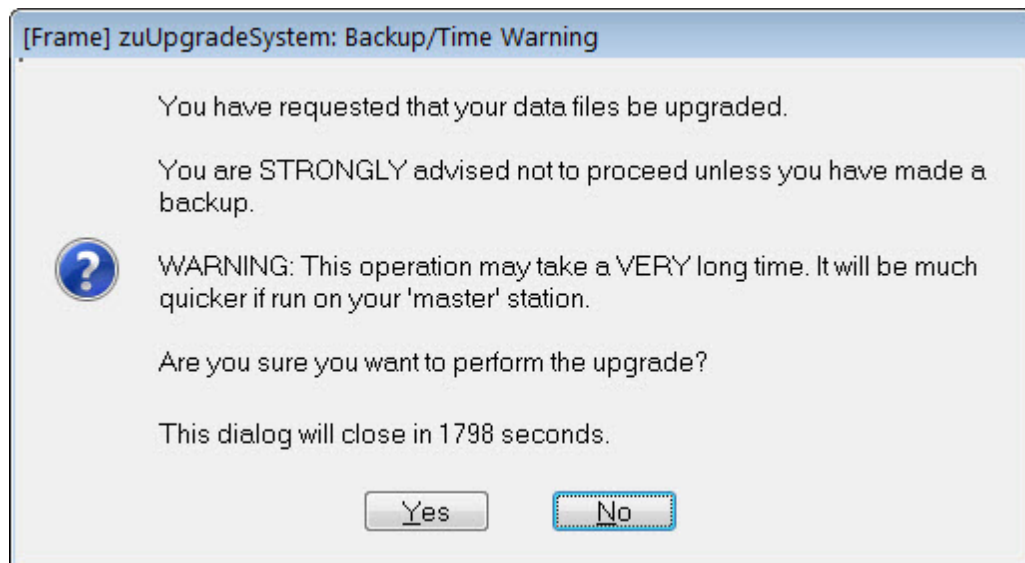
If you see this screen, it means the new version has detected and understood the changes required correctly. If your old version is too old to be upgraded to the new version, you will see a different screen informing you of this. In this case, you must find an intermediate version of the software and upgrade to that first (these intermediate versions are referred to as 'bridges'). Ask your Match-IT supplier for the appropriate 'bridge' version or check out <http://download.make247.co.uk> as many old versions are available to download from there.

**IMPORTANT:** Once your data has been upgraded it will not be possible to run your previous version. If you find the new version does not operate correctly for you, you will need to restore your data to the state before the upgrade and re-install your previous version of the software. For this reason it is **STRONGLY** recommended that you make a backup copy of your data folder before any upgrade.

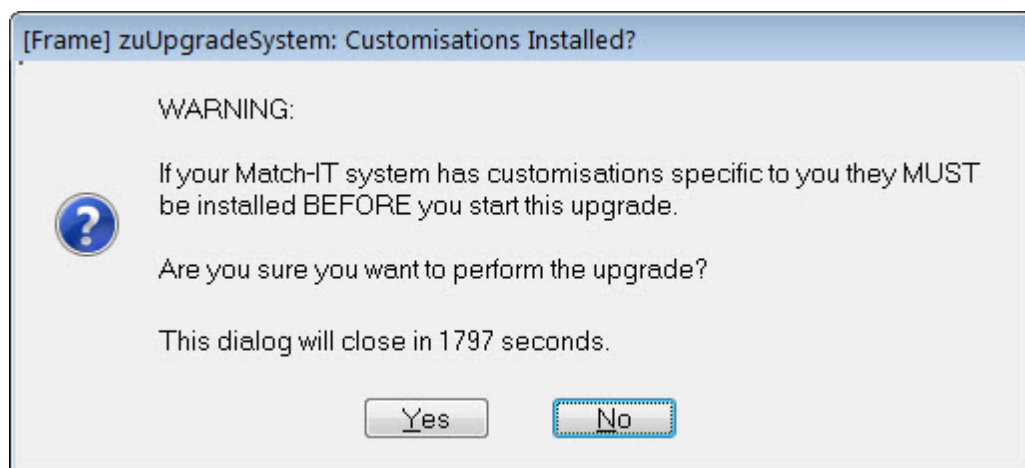
When you are ready to proceed, press **Yes**.

You will be asked to confirm the action with a screen like this:

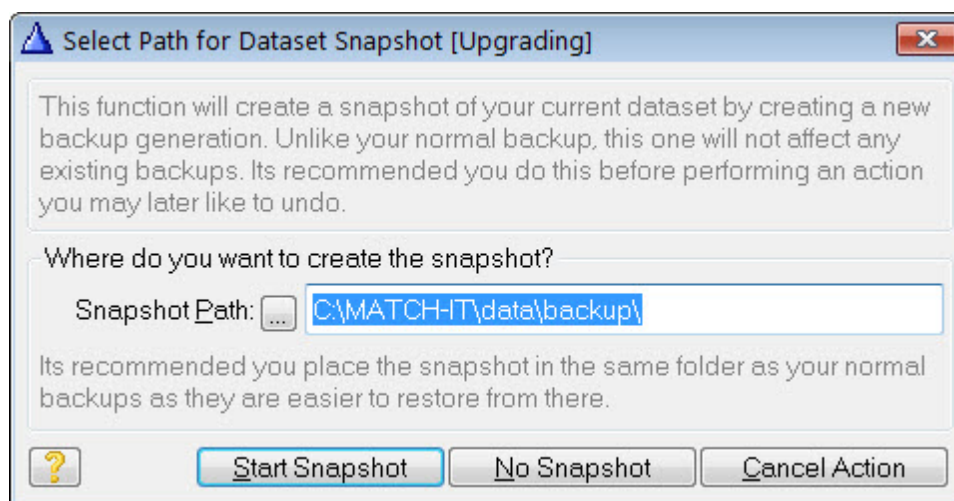




Press **Yes** to confirm the action.

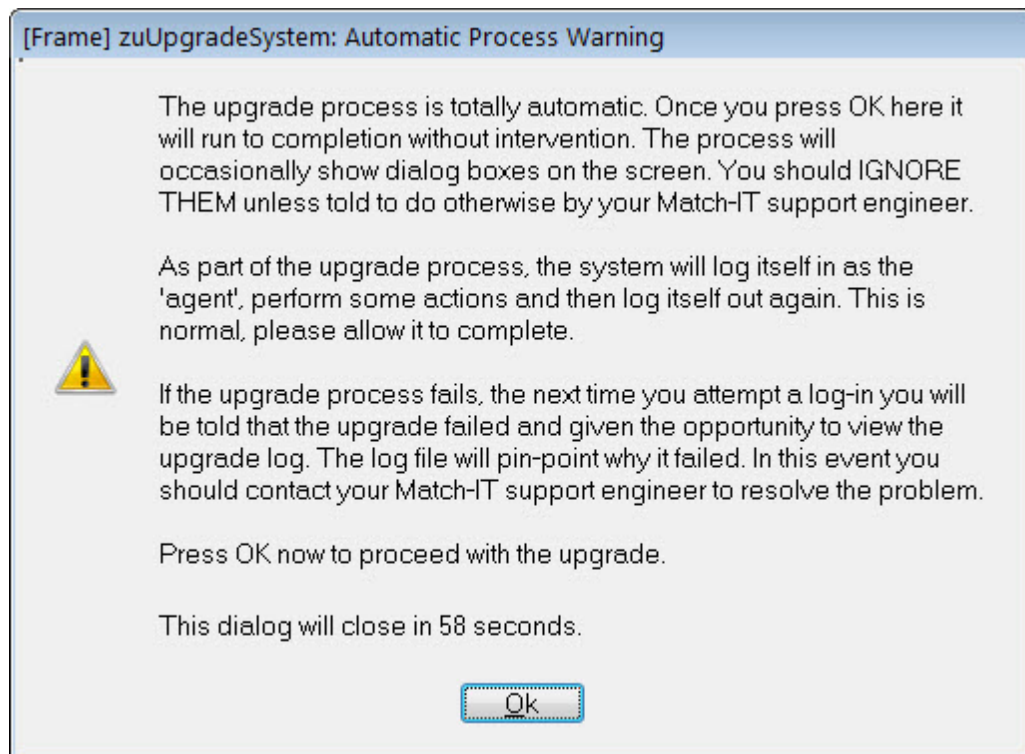


Next you will be asked to confirm that your customisations have been loaded. You can ignore this if you do not have any customisations. Press **Yes** to proceed. Next you will be invited to take a 'snapshot' of your data:



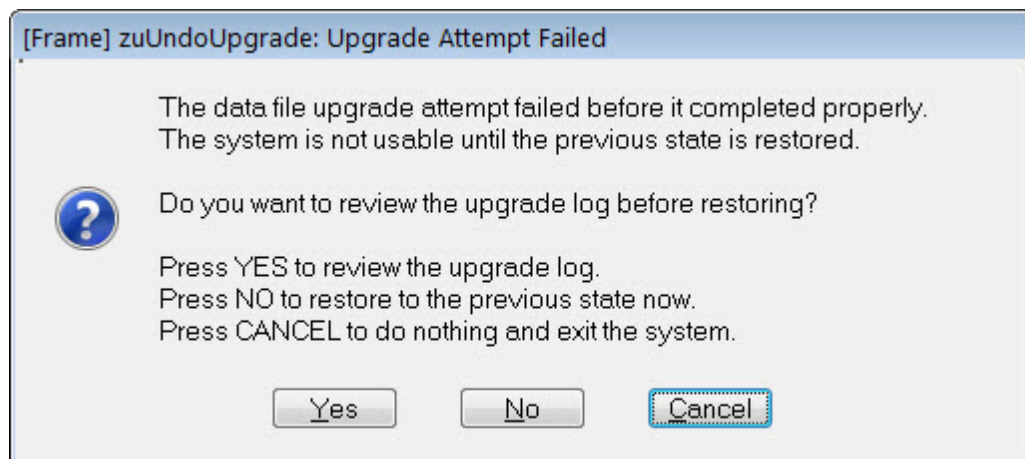
This is useful if you later discover the new version does not operate correctly for you. The snapshot will allow you to revert to your data as it was before the upgrade. The Snapshot Path offered will normally be your

Match-IT backup folder. The procedure to recover data from this snapshot is described in Undoing an upgrade. The final message you will see looks like this:



This is just informing you that the upgrade will proceed un-aided. Press **OK** and let it get on with it. Various messages may be shown as the upgrade proceeds. Just ignore them. Part of the process involves logging-in to perform some more actions and then logging out again.

If you leave it to it and come back later, it's normal to find it has shut-down. Start it again as normal. If the upgrade succeeded, you will be asked to log-in as normal. If it fails, instead you will see something like this:



There are many reasons why the upgrade might fail. If it happens to you, contact your Match-IT support engineer for guidance. If you want to just back out of the upgrade and revert to your previous version, select **No**. Match-IT will then restore your data to its original state and start again. It will show the **Confirm Upgrade** dialog again. This time select **No**. It will shut-down. Find your previous version CD and re-install that.

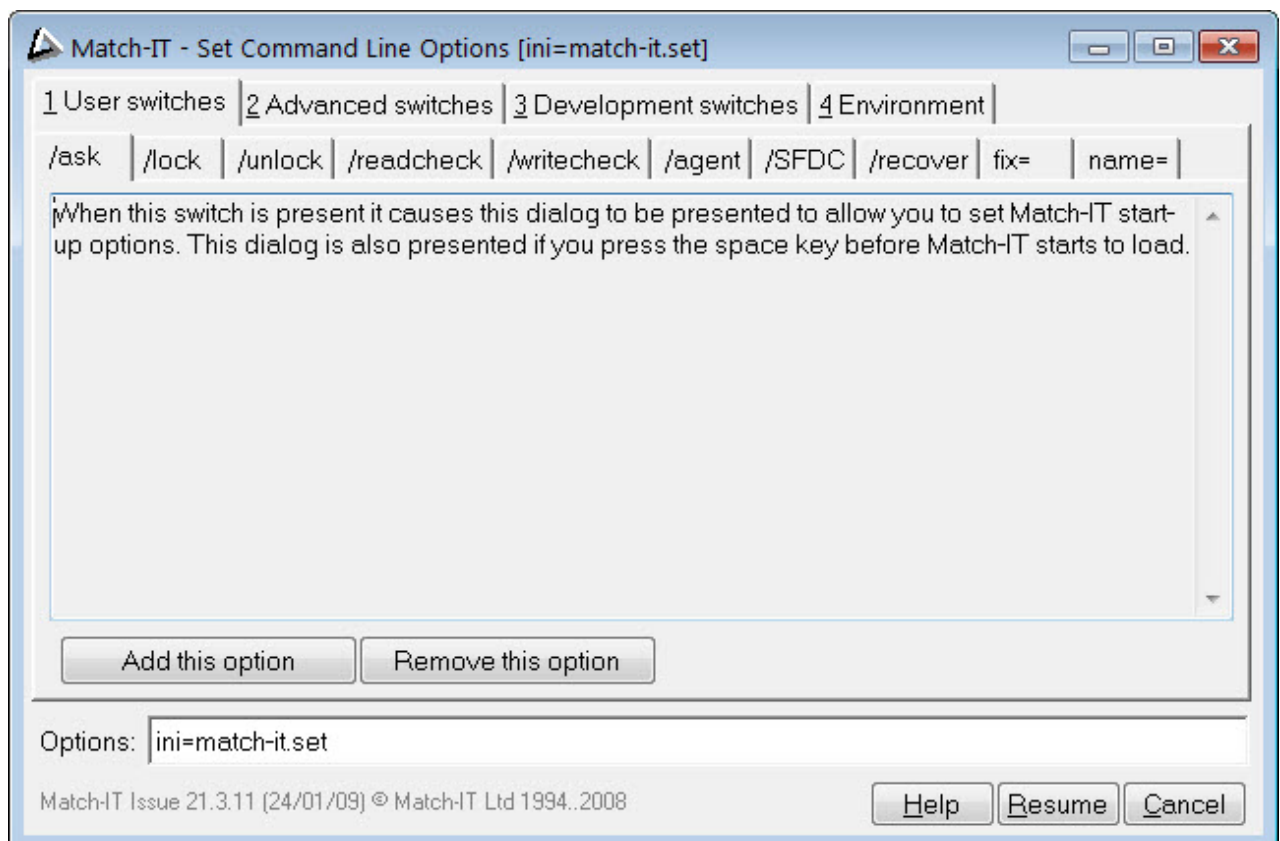
## 6 Undoing an upgrade

There are two stages to reversing an upgrade: stage 1 is to re-install the previous version of the software, stage 2 is to restore your data.

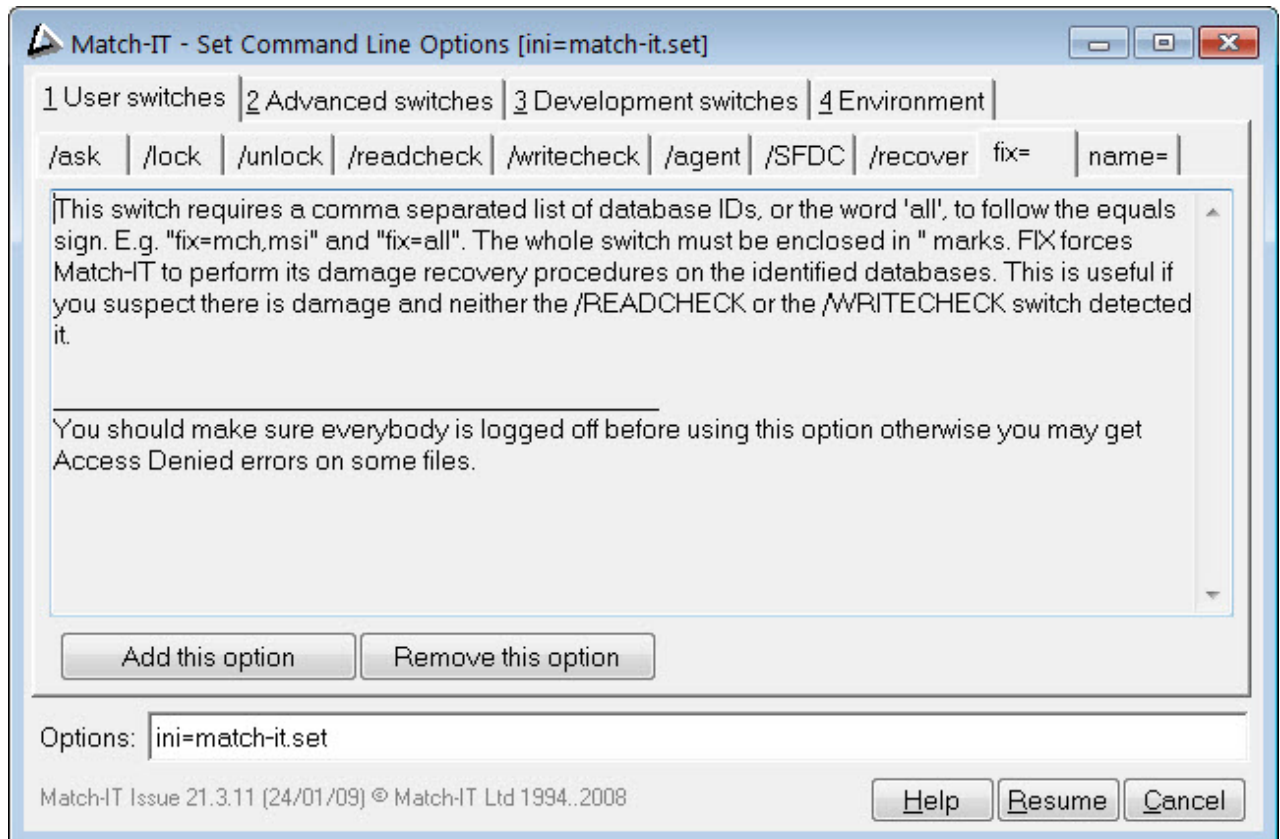
The previous software version you re-install must match the data you are also going to restore. To re-install the software just follow the procedures described in Loading the new software and Loading your customisations.

There are two main options to restore your data: option 1 is to use the 'snapshot' you took during the upgrade attempt, option 2 is to use some other backup. If you did not take a snapshot then you must restore your data manually. The data required is all the files with a `TPS` extension from the `data` folder in the Match-IT installation. If you took no snapshot and have no other backup then you are committed to using the new version; there is no 'undo' path available. You will need to consult with your Match-IT supplier to resolve the situation.

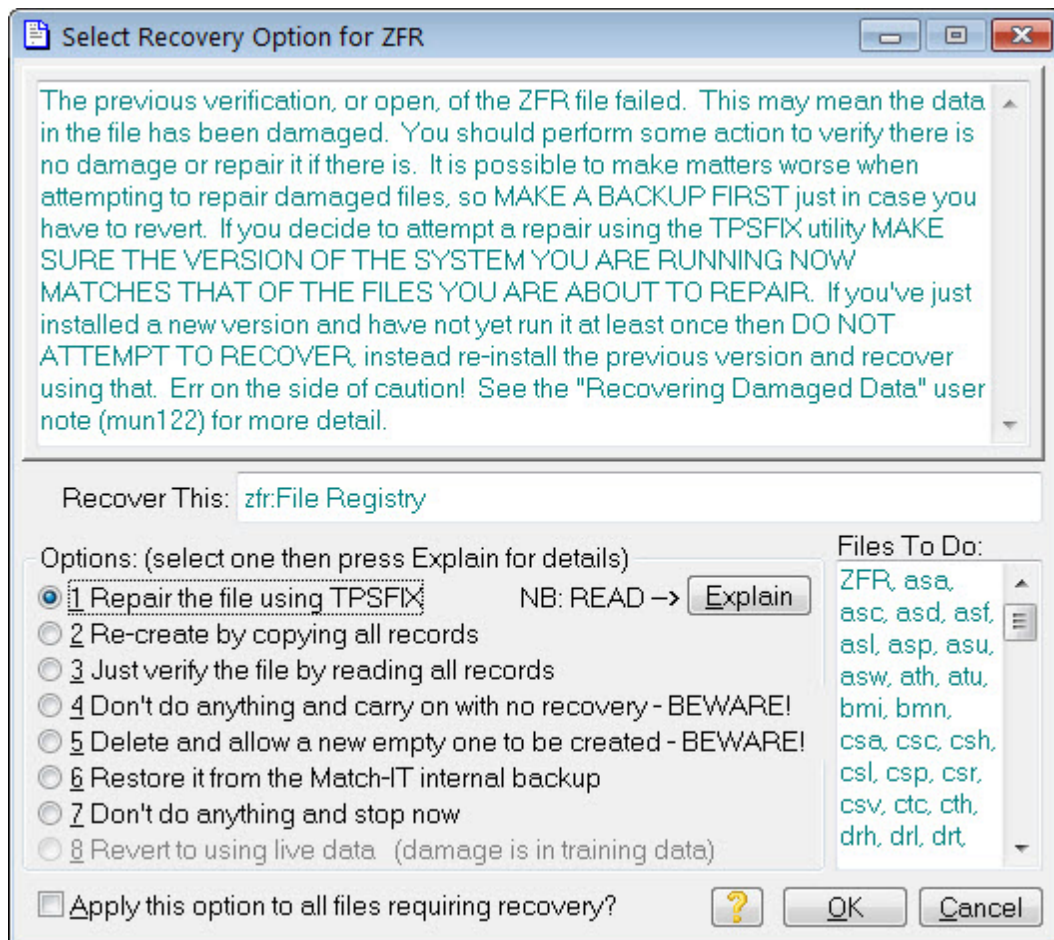
Restoring your data is straightforward if you took a 'snapshot' during the upgrade attempt. To do this, start the re-installed version of the software and when the splash panel appears, click on it. The command line switches screen will appear:



Click on the `fix=` tab, the screen will change to:

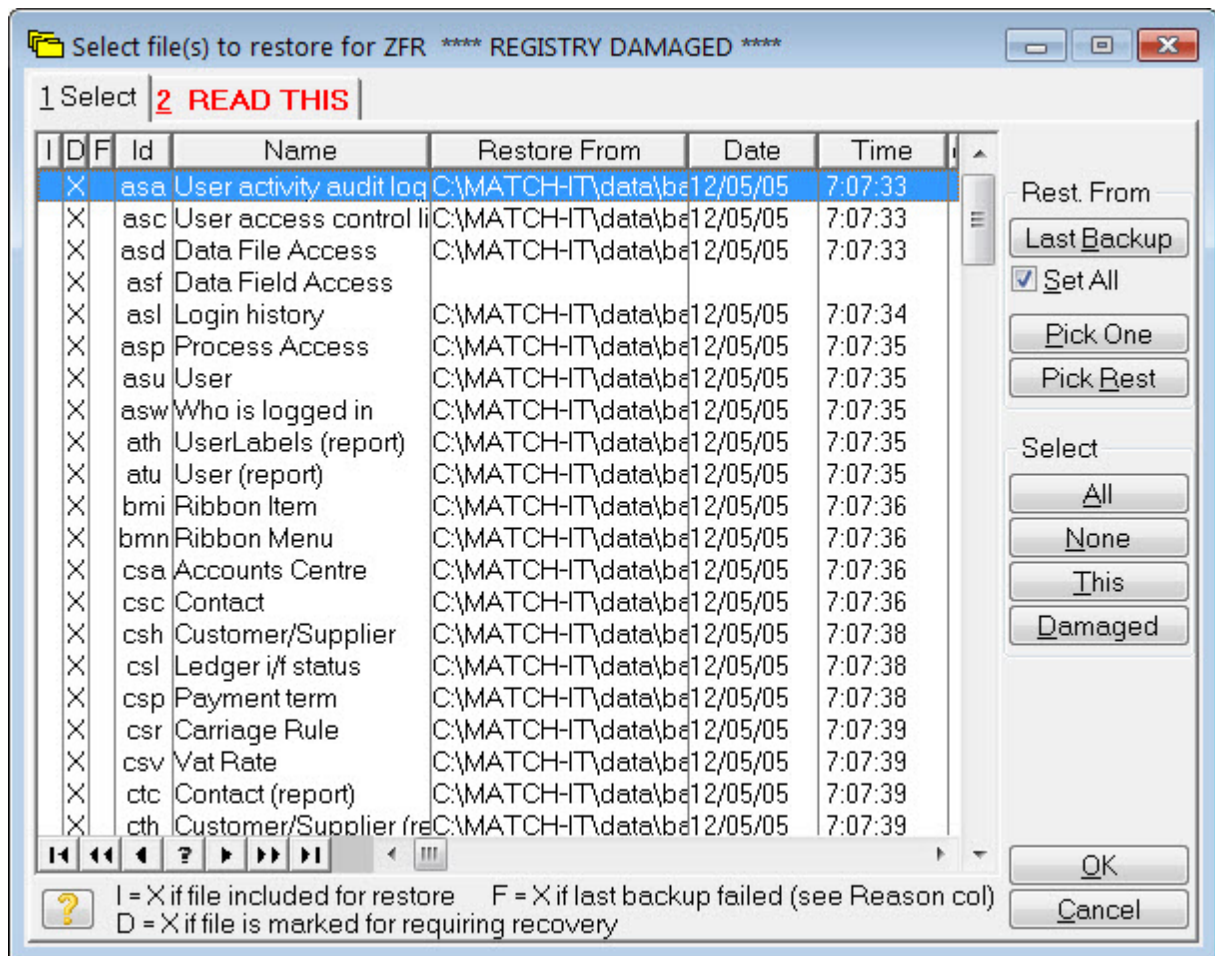


Click on **Add this option** then press **Resume**. After a short pause you will be presented with the recovery options, like this:



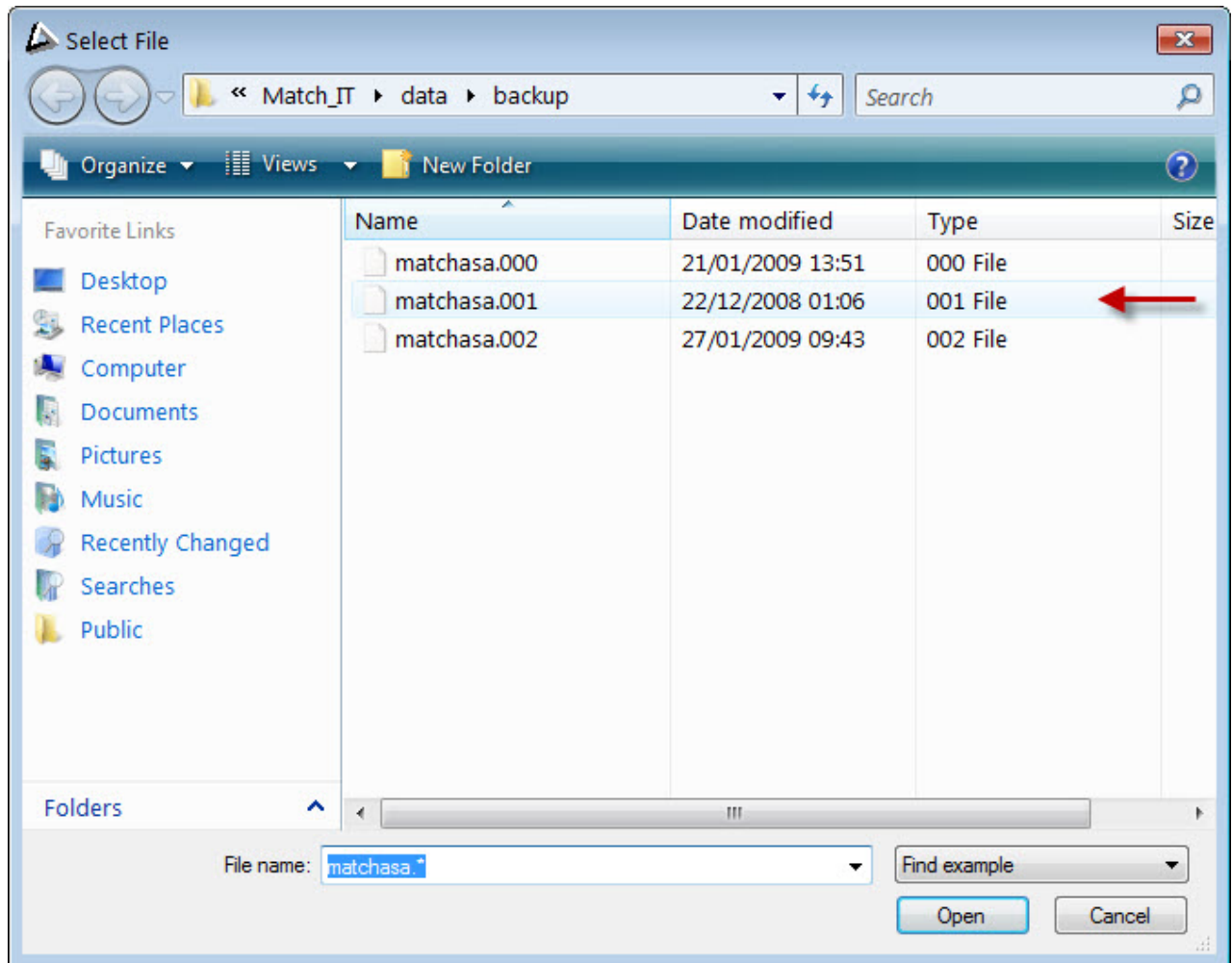
Select option 6 **Restore it from the Match-IT internal backup** and press **OK**. You will be presented with a list of databases to restore, similar to this:





Make sure **Set All** is checked, then press **Last Backup**. This will select the most up to date copy of every database to be restored. This will normally correspond to the snapshot you took during the upgrade attempt.

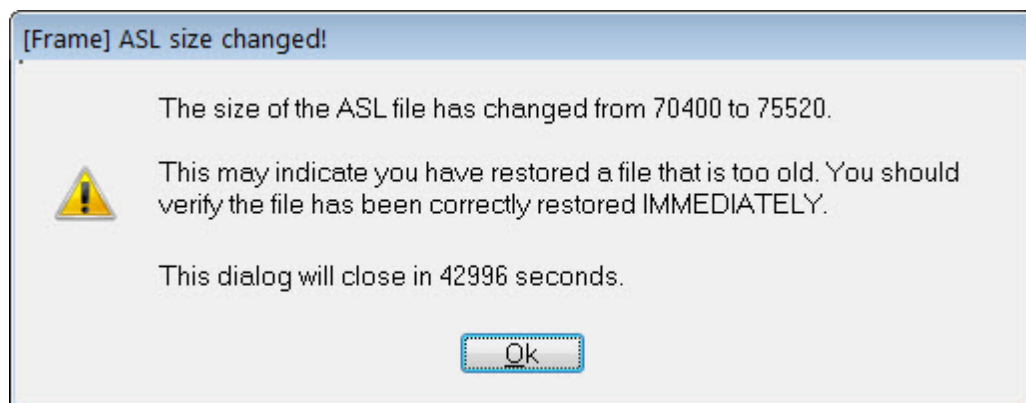
If you've performed an internal backup on the new version before deciding to undo the upgrade you may have to manually select the files to restore. In this case there will be multiple backup copies of the databases available. Pressing **Pick One** will show you a list of all copies available for the file highlighted using the normal windows file select dialog. Make sure you can see the file details and use the date/time information as a guide to select the version you want to restore. Like this:



Having selected the appropriate version, press **Open** to return to the files to restore list. Notice the date and time columns on the file highlighted now reflect the version you picked. Now press **Pick Rest** to select the same version for all the other files. Notice the date and time columns change for all the other files. They will change to the closest in time versions available to the one you manually picked; the date/times may not be identical but they will be close.

Once the file version set to restore has been picked, press the select **All** button. An **x** will appear in the **I** column to indicate the file has been selected for restore. Finally, press **OK**.

Your files will now be restored. During the restore you may receive advice that a file has changed size significantly, like this:



Make a note of the file ID (shown in the title - ASL in the example above). When you log-in to the recovered

system you will need to convince yourself no information has been lost. For example, check the last thing you did is still there.

When the restore is complete, the software will resume it's normal start-up and you will be invited to log-in.



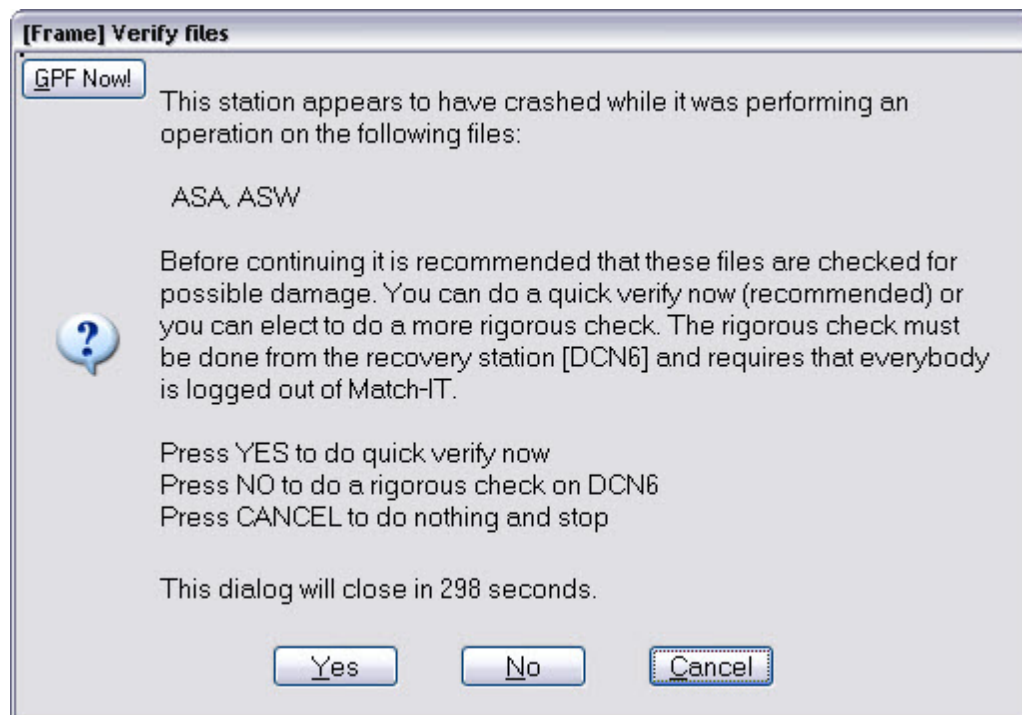
## 7 Damaged Data Recovery

Match-IT goes to great lengths to check and maintain the integrity of the information it holds. However, sooner or later damage will occur, due to a power failure, faulty network, faulty PC or for a whole raft of other reasons. Whenever Match-IT starts, it does a rudimentary check for damage in your data. This is what is happening when you see this panel:

zf.File System - Pre-init (locating:CSC)

You will see the file mnemonic (CSC in the example above) cycle through all your databases as they are checked. If no damage is detected, you will be asked to login as usual. However if damage is detected, Match-IT will initiate its damage recovery procedures. There are 2 stages to this recovery.

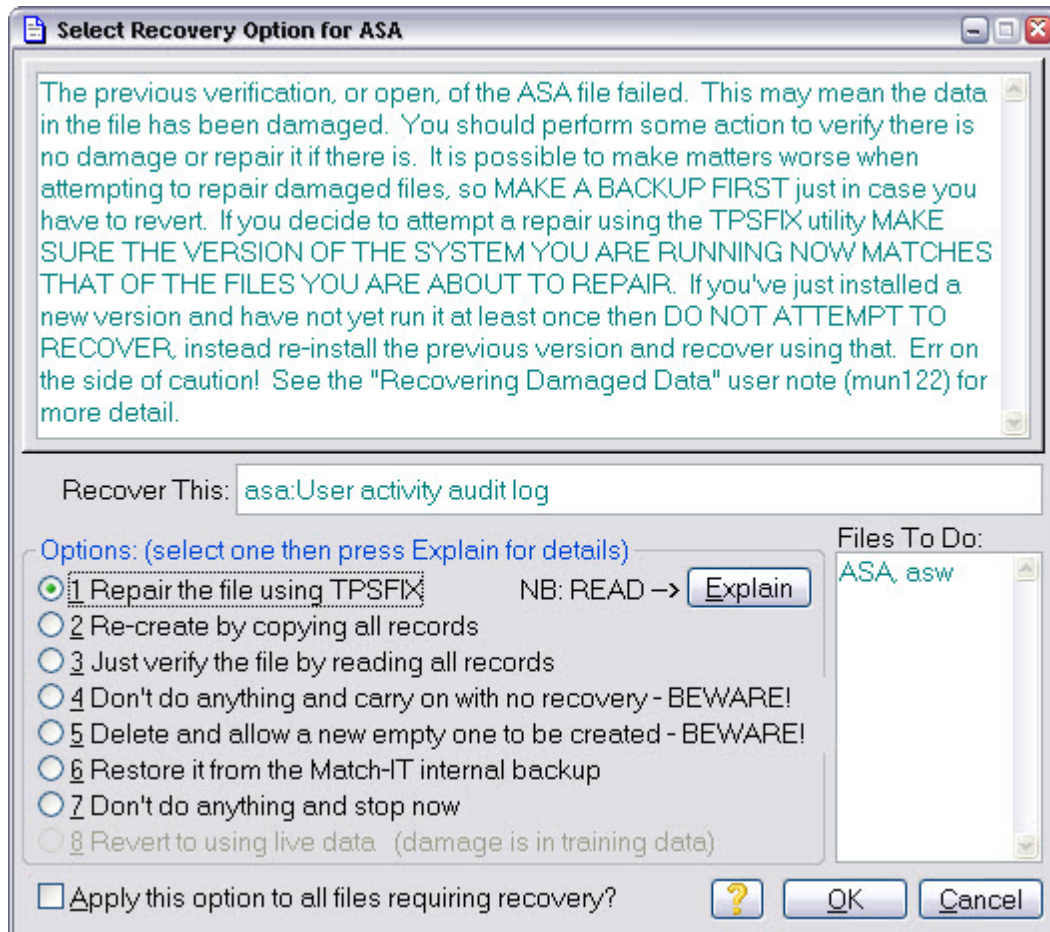
Stage 1 is a local, more intensive, check for damage. You will be asked to perform a verification with a dialog like this:



In the first instance, it is recommended you perform a quick verify, press **Yes** to do that. This checks the databases listed (the ASA and ASW in this example) can be read and written without error. If these checks pass then the damage has been repaired; Match-IT will continue its start-up procedure and you will be asked to log in as usual. If these checks fail then the damage recovery system will move to stage 2.

Stage 2 is a global recovery system and is instigated if serious damage is detected. When this happens, all stations currently logged-in to the dataset will be asked to log-out. Any attempt to log-in will be refused until the damage has been repaired. Stage 2 damage repair can only be done from the nominated 'recovery' station (DCN6 in the example above). This is usually your server, unless your server is not running *Windows™*. A station can be nominated as the recovery station by adding the `/recover` switch to the command line that starts Match-IT (either in the start-up icon or by clicking on the splash panel, selecting the `/recover` tab and pressing **Add this option**).

You will be presented with a form like this:



Here you are presented with a number of options to recover the damaged data. Unfortunately, there are no hard and fast rules about which option is best. It's recommended you try the TPSFIX option first. This tool tries to recover information by using the redundancy built into the files. It might not always be able to do that, in fact it may crash in the attempt.

**If the TPSFIX option crashes in the attempt, or Match-IT crashes, it is very important that you immediately re-start Match-IT on the same station. This is necessary so it can detect the failed attempt and restore the databases to the pre-repair attempt state. If you do not do this, you will make the damage much worse.**

The next thing to try is the **re-create by copying all records** option. Again, if that fails you must immediately re-start Match-IT so it can recover from the failed attempt.

The final option is to restore from a backup. If you have to resort to this, it is highly likely you will need to restore everything not just the damaged files. This is because most files are inter-related, so doing a partial restore can lead to inconsistencies, e.g. a purchase line with no purchase header.