UPGRADING FROM PIMS-X

(Mac and Windows PC)
8/27/11 12:19 PM

Please Note:
An informal video was made back when PIMS-SQL was in BETA trials. It showed the fundamental differences between PIMS-X and PIMS-SQL. It can still be found on-line, and is a really good source to start with. It can be found at:

http://www.industrialbitworks.com/PIMSSQL/PIMS-SQL-BETA.mov.zip

This Tech Note will explain the necessary steps to upgrade your existing PIMS-X system to PIMS-SQL. This applies to both "Single-User" and "Client/Server" editions.

There are just a few steps necessary to convert one system to another. This differs greatly from the migration of PIMS-Classic to PIMS-X, which could take days...

These steps will generally involve the following:

- Opening up your existing PIMS-X Datafile with PIMS-SQL, and let it automatically convert
- Authenticating your copy of PIMS-SQL With ExecUtron ("ExecULocks" are no longer used...)
- Run a single "conversion" function to bring certain records current
- Importing/converting any custom "Forms Designer" templates from PIMS-X
- Updating a few new settings

CONVERTING YOUR EXISTING PIMS-X DATAFILE:
The initial step in converting your existing PIMS-X Datafile is to simply open it with PIMS-SQL. No matter what type of PIMS-SQL you're running (Server or Single-User), you might find it easier at this point to convert your Datafile with a Single-User version of PIMS-SQL.

Make sure you have turned your machine off and re-booted it before starting. This makes for a clean slate before converting and is a very important step.
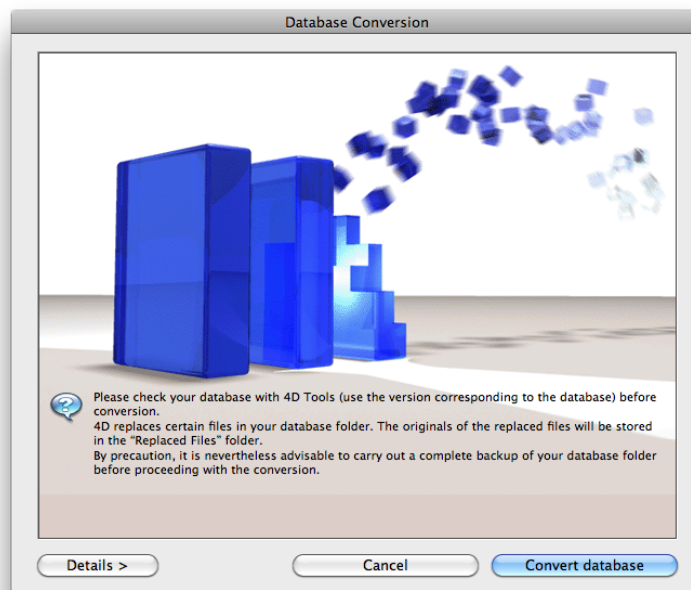
Run the Single-User version of PIMS-SQL. Upon doing so, you will be prompted to select a Datafile.
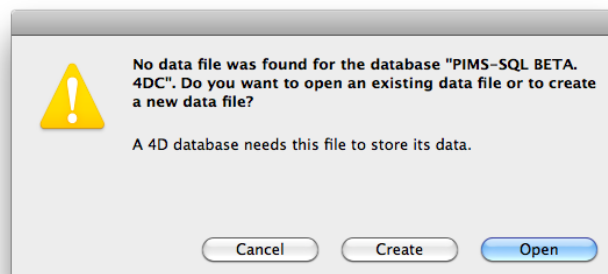
Now select a copy of your existing PIMS-X Datafile (it ends in ".4dd").
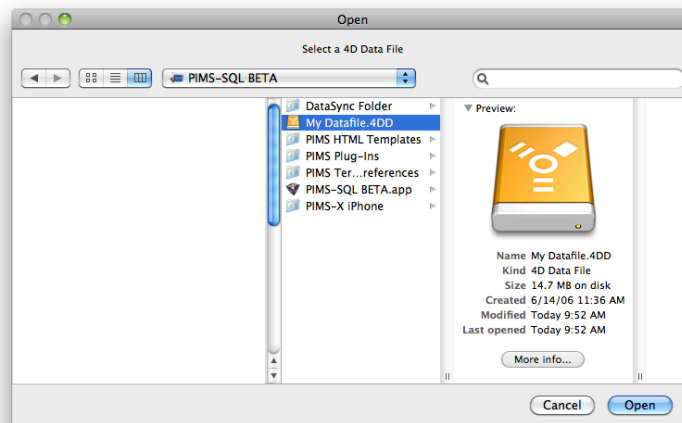
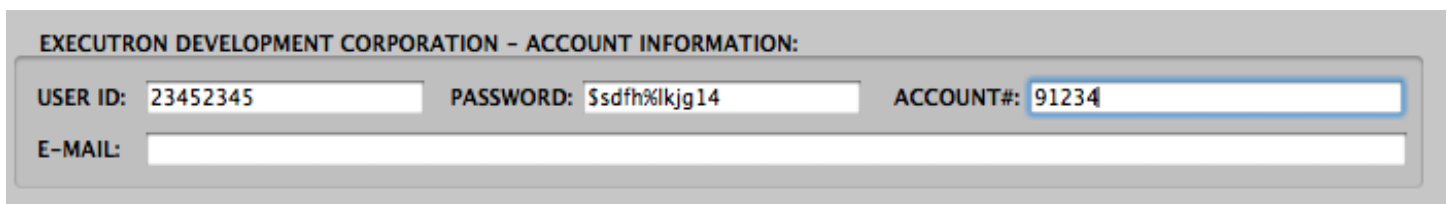Once selected, click "Open". You will now be prompted to convert the Datafile:

Click "Convert Datafile" to continue. At this point, the conversion process will backup your original Datafile (and any segments) to a folder called "Replaced Files (Conversion)", and start building a new PIMS-SQL Datafile. This can take as little as a matter of minutes to a couple of hours. It all depends on the size of your Datafile. A 6GB Datafile takes about two hours, as an example.

Please note that in PIMS-SQL, you will have a single "non-segmented" Datafile no matter the size (unlike PIMS-X which divided your Datafile into 2GB segments). However, your Datafile will always be comprised of two separate files. One file is your data (".4dd") and the other is made up of all the indexing for your Datafile (.4DIndx). In previous versions of PIMS, the Data and Indexes were always contained together. If you ever need to copy a PIMS-SQL Datafile, be sure and copy both of these files...

Once the Datafile is initially converted, PIMS will fire up its core processes and notice that it is not authorized to run on that machine. At this point, it will tie into the EDC authentication system at the ExecUtron server farm. It will transmit the "ACCOUNT INFORMATION" from your Datafile's PIMS Preferences to our server for authentication. Because of this, you need to make sure of the following before starting this conversion process:

1. Make sure your are running this conversion on the actual machine that will be running this PIMS-SQL and Datafile (it will be mated to that machine from this moment on)

2. Make sure that machine has access to the Internet

3. Make sure your "EXECUTRON DEVELOPMENT CORPORATION – ACCOUNT INFORMATION" from page one of "PIMS Preferences" is filled-out properly in PIMS-X before attempting the conversion.


You can contact ExecUtron to verify this information if necessary, prior to installing PIMS-SQL…

If this information is entered properly and authentication is successful, you will see the following dialogbox:

Authentication takes place only once, as long as you're using the same Datafile on the same machine it was authenticated for. If you change Datafiles and/or move your PIMS-SQL system to another machine, you will need to "De-authorize" it first and then re-authorize it on the new machine (explained in another document).

If you attempt running PIMS-SQL with missing ACCOUNT INFORMATION in PIMS Preferences, you will receive a warning:
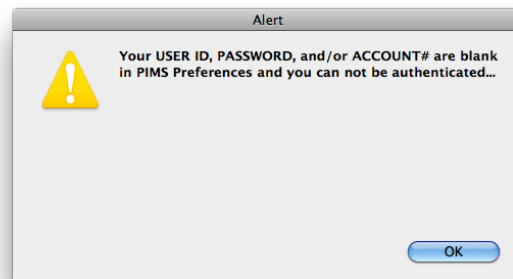
If you receive this warning and/or authentication fails for any reason, you will be prompted for a "Day Pass" to gain access to the system:
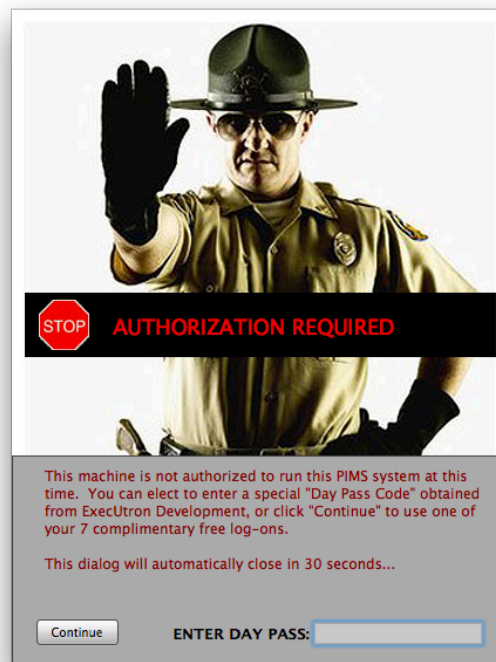
As "Day Passes" change every day and come directly from contacting ExecUtron Development Corp., you probably won't have one. If this is the case, click "Continue". Doing so will display the following prompt:
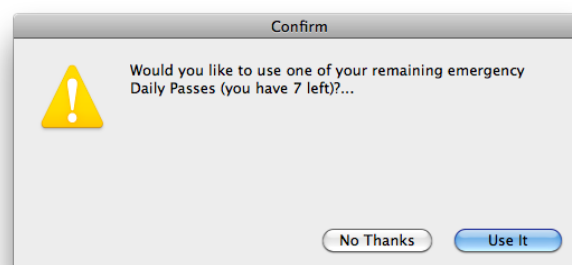
Every new PIMS system comes with seven emergency "Daily Passes", that allow you to get into your PIMS system and run it. At this point, you will need to use one of these Passes. Click "Use It".

You will now run under a "Day Pass" for about 10 hours:

TEMPORARY DAY PASS

Concludes: 10:35 PM

Remaining: 9 hours 59 minutes 21 seconds
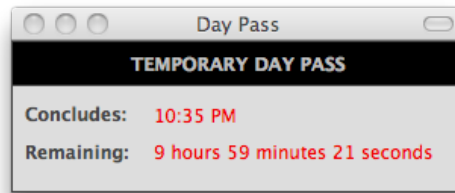
However, you will only need to be in the system for a few minutes at this point. From here, go to PIMS Preferences (found under the File menu), and enter your ACCOUNT INFORMATION. Now save Preferences and quite the program. Re-Boot PIMS, and authentication should happen (if you have an Internet connection. Now quit and try it again. This time, you should be taken directly to the main splash-screen.

Authentication only happens once, unless there is a change in environment.

At this point, you can elect to boot back up the Single-User PIMS-SQL or launch the PIMS-SQL server and select your new Datafile. We still have a few more things to do, so we recommend sticking with the Single-User version for now.

RUNNING THE "CONVERSION FUNCTION":
In PIMS-SQL, certain records are processed differently internally than PIMS-X. Most notably is the "Document Storage" found on many PIMS records (Orders, Customers, Inventory, etc.). Most of these are no longer stored on the actual records, but rather on their own records that reference back to the origin records. This makes for better performance and allows us to increase the size limit of stored documents to 20MB per document. Because of this, your stored Documents need to be stripped off of the origin records and sent to their own records. This, along with some other housekeeping, is done from a single User selected menu function. Go to the Import/Export Module and select "Update Converted PIMS-X…" from the PIMS-X menu (this can't be skipped, and should be done right away):
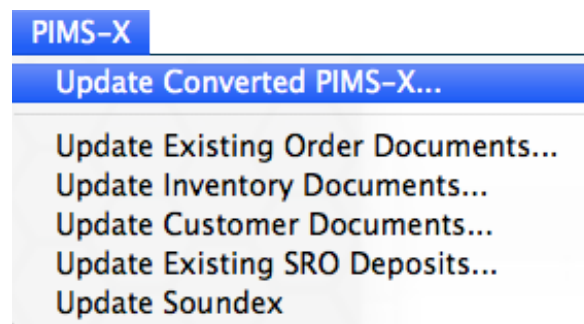
This process can take a bit to finish, as it might be scanning hundreds of thousands of records. The number of stored documents and Customers you have will influence this process. It might take as long as two hours on large Datafile. When finished, you will receive a dialogbox:
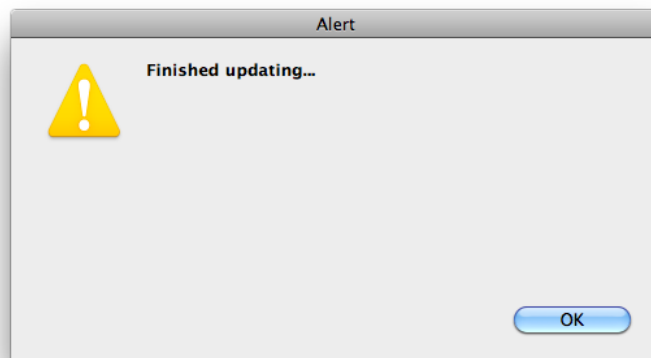
At this point, it's a good idea to re-boot PIMS before continuing.

CONVERTING CUSTOM OUTPUT TEMPLATES (FORMS DESIGNER):
When you convert your Datafile, PIMS will automatically delete all Forms Designer templates and replace them with new ones that are compatible with PIMS-SQL.

ExecUtron has licensed an entirely new Forms design engine, which is not compatible with the previous versions of PIMS. However, a conversion process exists for those with Custom Templates they've created.

At this point, you have to decide if you want to convert your existing templates over to PIMS-SQL or simply modify the new default templates to your liking.

If you elect to convert your existing templates, you simply need to export them from PIMS-X and load them into PIMS-SQL. This is done by a special process.

First off, you need to go back into PIMS-X and save certain templates you with to keep to a disk file. To do this, go to Forms Designer in PIMS-X, open a template, and select "Save To Disk As..." from the small File menu:
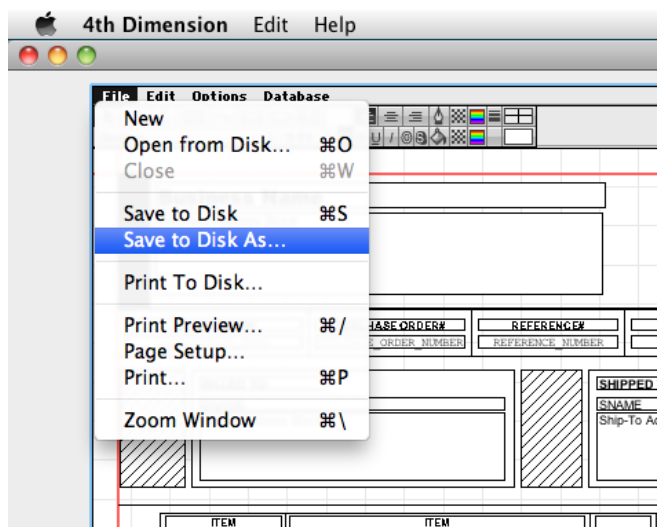
It's a good idea to name the file in a similar fashion to the actual Template name used by PIMS-X.
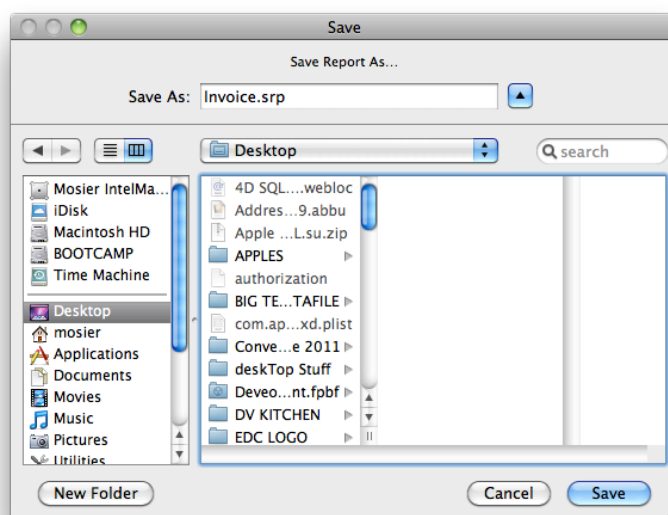
Repeat this step for every Template you wish to move into PIMS-SQL.

Once you have a collection of saved Templates, go back into PIMS-SQL, create new Templates, and load these saved PIMS-X Templates onto the new blank Template screens in PIMS-SQL. To do this, first go to the PIMS-SQL Forms Designer Module.

Select "Create New Template..." from the Templates menu:
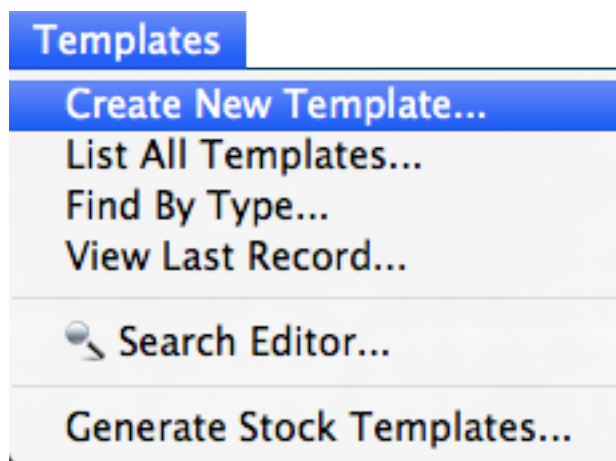
Now select the type of Template you wish to create:
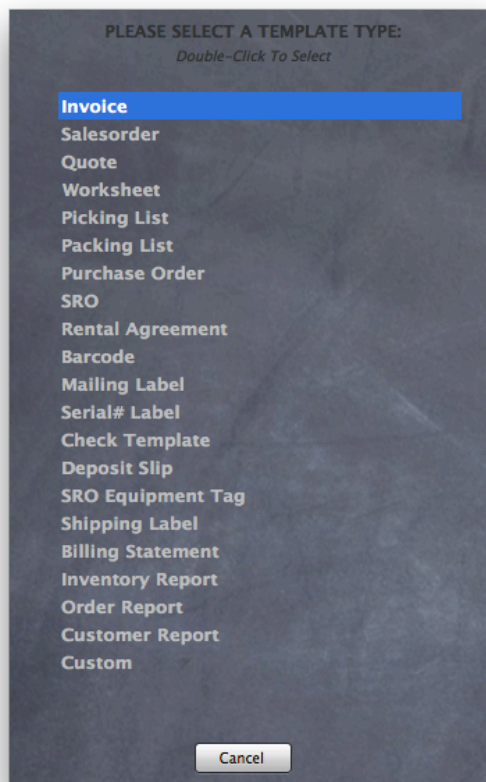
You will now be given a new blank Template screen.

Go to the side-bar on the right, and click the "Import PIMS-X" button:
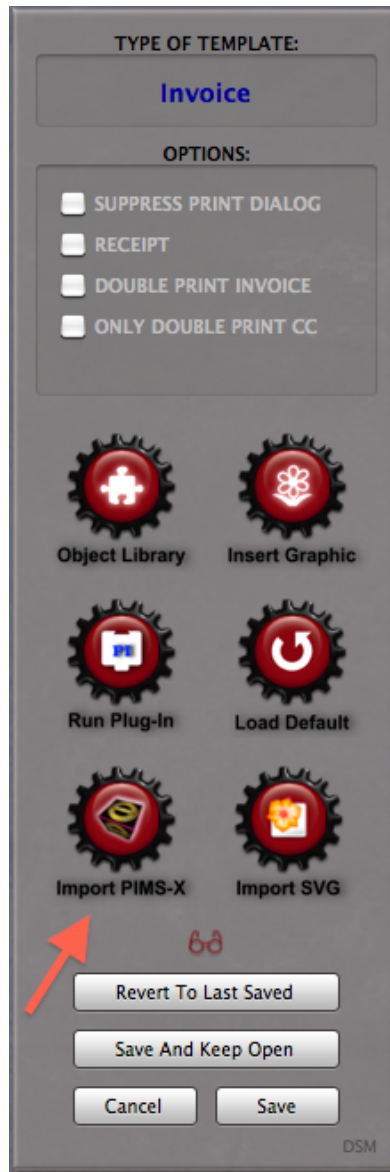
You will now see the following, and be prompted to select a saved PIMS-X SRP file:
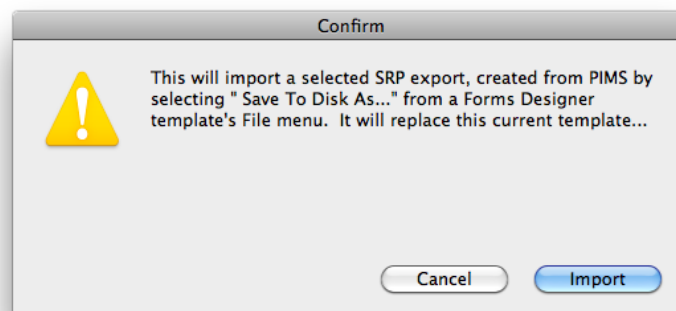
Your Template will load onto the screen with all of its internal Form settings intact:
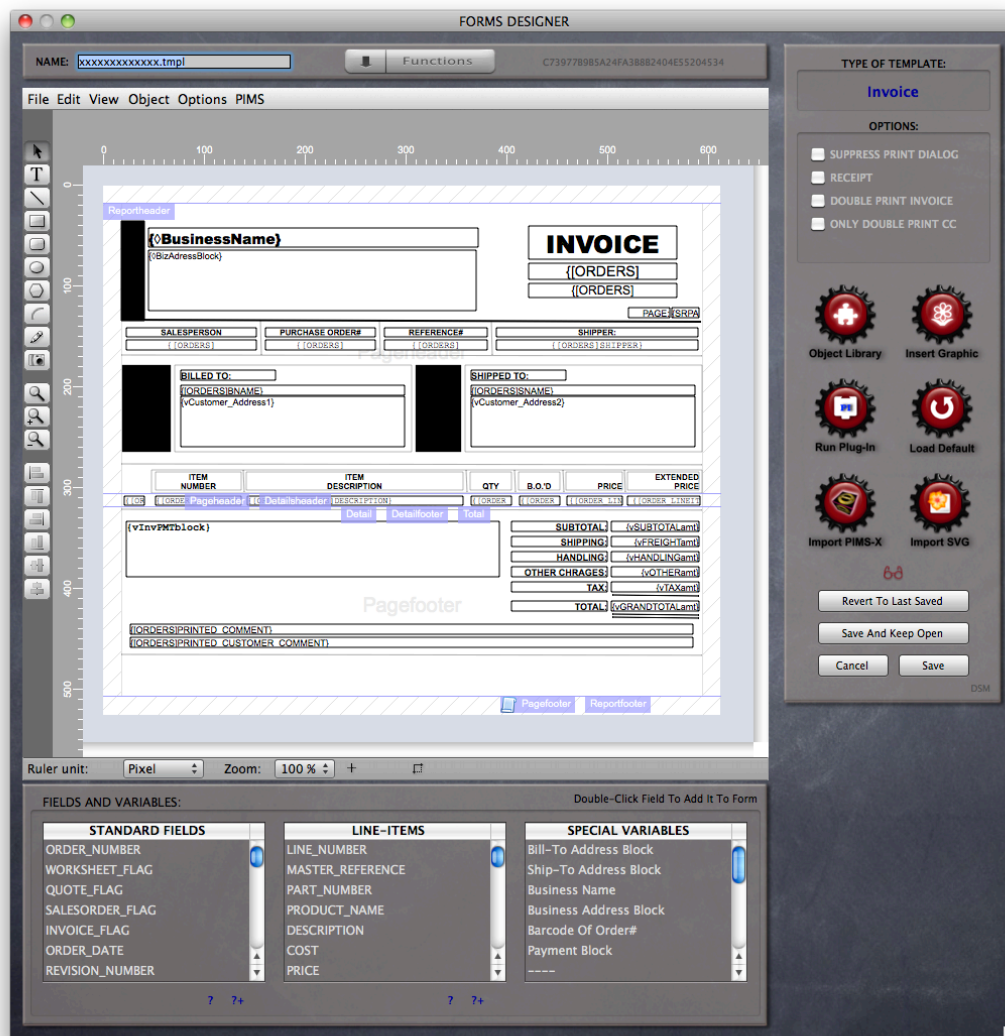
The first thing you'll want to do is expand the window, if it isn't already. Then you should adjust the "Zoom" to something like 200%. This will make tweaking easier on the eyes:
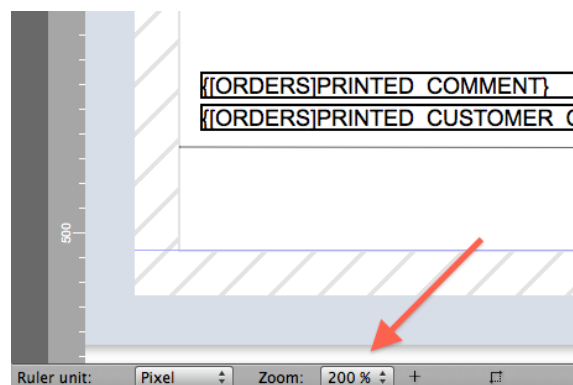
Some, but not all, older Templates need to have some of their "line objects" straightened after the conversion.
A line is usually not off by more than one pixel, and is easy to identify:

QTY	B.O.'D	
{[ORDER	{[ORDER	{[

TAX:	{vTAXamt}
TOTAL:	{vGRANDTOTALamt}

You'll notice that both horizontal and vertical lines could be affected. The fastest way to correct this is to select a line, hold down the "Command" key ("Control" on PC) and press one of the Arrow keys on the keyboard. The Arrow key will move one side of the line up/down or left/right one pixel.

straightened…

The only other thing to do is name the Template (upper left corner field) the exact same name as it was called in PIMS-X. As this is a new Template in PIMS-SQL, you'll need to adjust any specialty parameters such as "Receipt" flag, CC printing, etc. Other than that, everything else should be the same.

In PIMS-X, there were other areas where Templates were found. This was mostly in the EDC Accounting Module and Service & Repair Module. In PIMS-SQL, all Templates now reside in the Forms Designer Module. You'll need to make sure and export these from PIMS-X as well, if you modified them. Once they're in PIMS-SQL, you'll need to go to these other Modules and reference them there.

In EDC Accounting Prefs, you'll need to reference the "A/R Statement" Template. This is found on page one in the lower left-hand corner:

The Bank records also had your Check and Deposit Templates stored on them. These too need to be referenced. Go into each Bank record that had a Template on it, and reference them from Forms Designer:

For those with the Service & Repair Module, you'll need to go into SRO Preferences and select your Equipment Tag (if you use one):

Make sure your Templates match the names you used in PIMS-X for your various Default printing Templates used by your terminals:

ADDITIONAL CONVERTION INORMATION:

PIMS-SQL is compatible with your Backed-Up Users and Groups from PIMS-X. This means that you don't need to reenter all of your Users and assign them to Groups. Make sure you have them backed-up in PIMS-X prior to converting your Datafile (PIMS Preferences, page one):
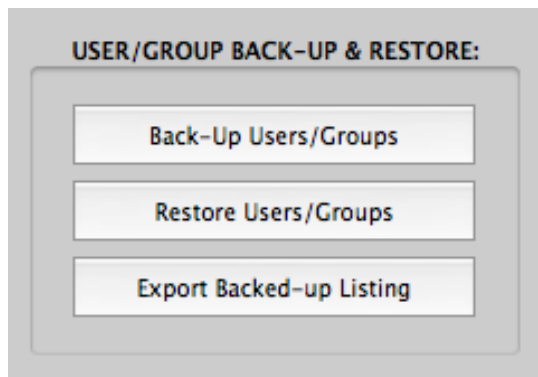
Once you're in PIMS-SQL, go to PIMS Preferences and "Restore" them.

If you're created any Custom Inventory and/or Customer entry screens (Forms Designer Module), unfortunately they are not compatible and must be recreated. This is easy enough to do from the Forms Designer Module, and works exactly the same as PIMS-X.

If you've done custom naming of any "Custom" fields in PIMS-X, these are compatible with PIMS-SQL and no further action is needed from you.

You might have set a lot of "Terminal Specific" settings on your PIMS-X Client terminals, for such things as printing, e-mailing, etc. The good news is that PIMS-SQL can read these same settings files that PIMS-X used. These various Terminal-Specific defaults and parameters are keep in a folder called "PIMS Terminal Preferences", that resides in the PIMS-X Client folder at the same level as the app itself. Once you have the PIMS-SQL Client installed on your terminals, you can simply copy the "PIMS Terminal Preferences" folder from the PIMS-X Client folder to the new PIMS-SQL Client folder. When you launch the PIMS-SQL Client, it will adopt all of the PIMS-X Client settings for that terminal.

Many of you have opted for a Custom Splash-Screen to personalize your PIMS Client terminals. These Custom splash-screens did not come over to your PIMS-SQL Datafile, as the format is entirely different.

First off, user-supplied splash-screens are now terminal specific. We also have a wide array of built-in splash-screen templates to choose from. To select one of these splash-screens for your specific terminal, select "Change Splash Screen" from the main File menu:
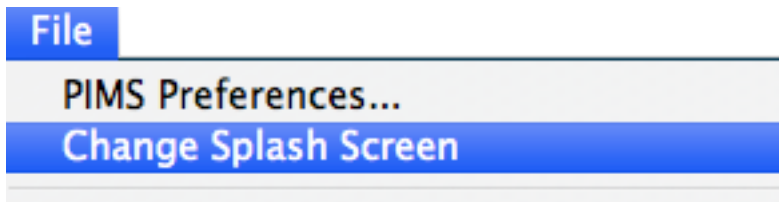
From there, you can select a splash-screen from the available choices:
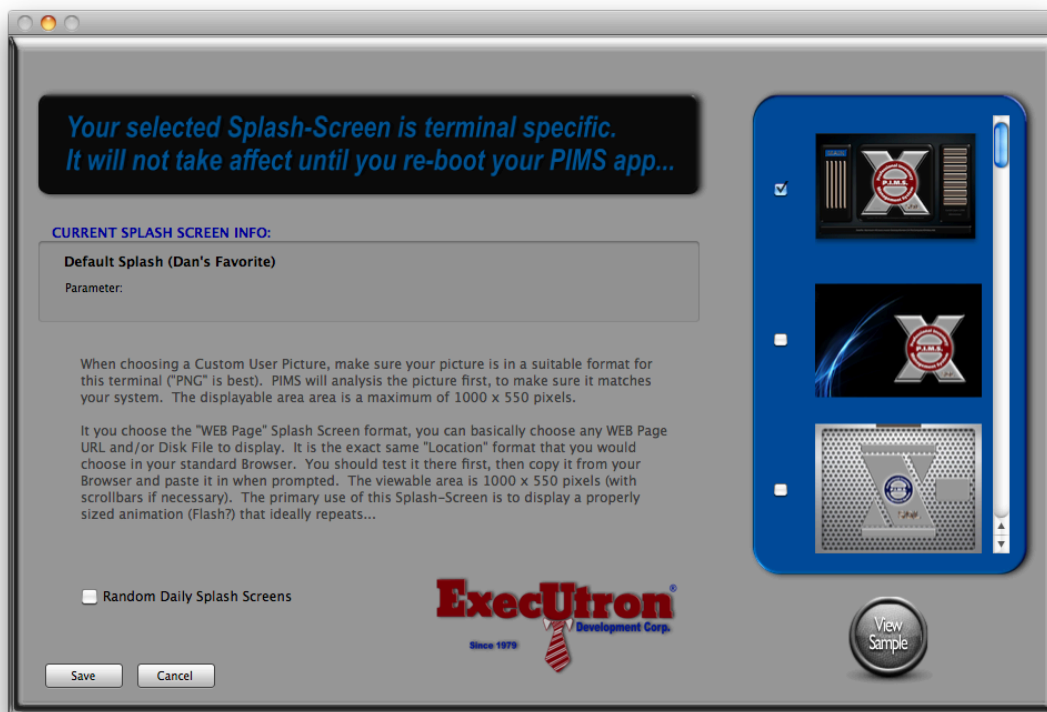
For those with Custom splash-screens from PIMS-X, select the "User Picture" screen:

Upon doing so, you will be prompted for a graphic that is 1000 x 550 pixels in size. There's even a splash-screen that can have a custom WEB site as a backdrop. This can be an actual WEB Site, or even an animated graphic or Flash document from disk.

Please note that some menu functions have moved, but most are exactly the same as you're used to. Most notably are utility functions such as assigning Users/Groups. A lot of these functions can now be found in the "PIMS Tools…" section, and is found under the main File menu:
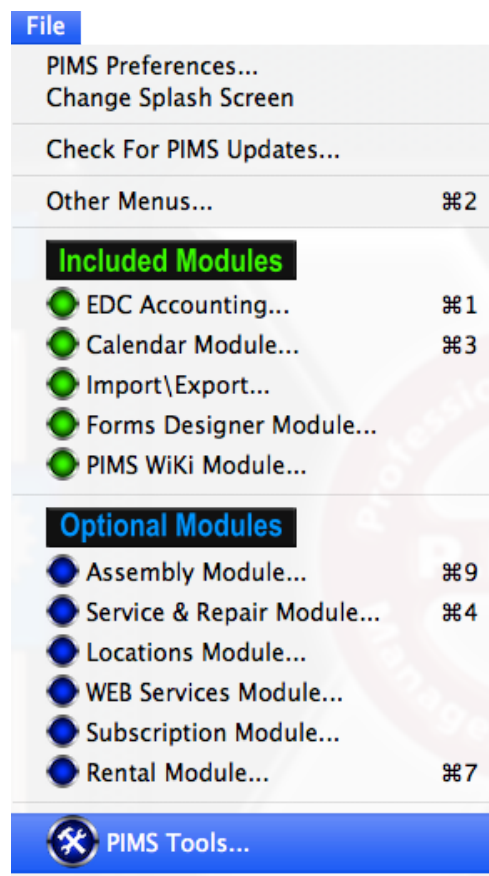
THE SERVER:
The PIMS-SQL server is now "SQL" based. It is based on the 4D version of SQL, which differs from other versions. It is substantially faster than previous versions of PIMS, and has little or no size limitations. For those savvy in SQL, you can gain limited access to Tables in PIMS-SQL Server (Read Only) with additional licensing from 4D (about $1600 per server as of this document). Please keep in mind that this is a special version of SQL, and whatever you plan to do may or may not be compatible. You will never be able to write to the PIMS-SQL Datafile from external sources, unless arrangements are made for special access plug-ins from ExecUtron. Externally accessing your Datafile is not supported by ExecUtron Development Corp. in any way.

The PIMS-SQL Server app itself looks a bit different, but acts basically the same as PIMS-X:
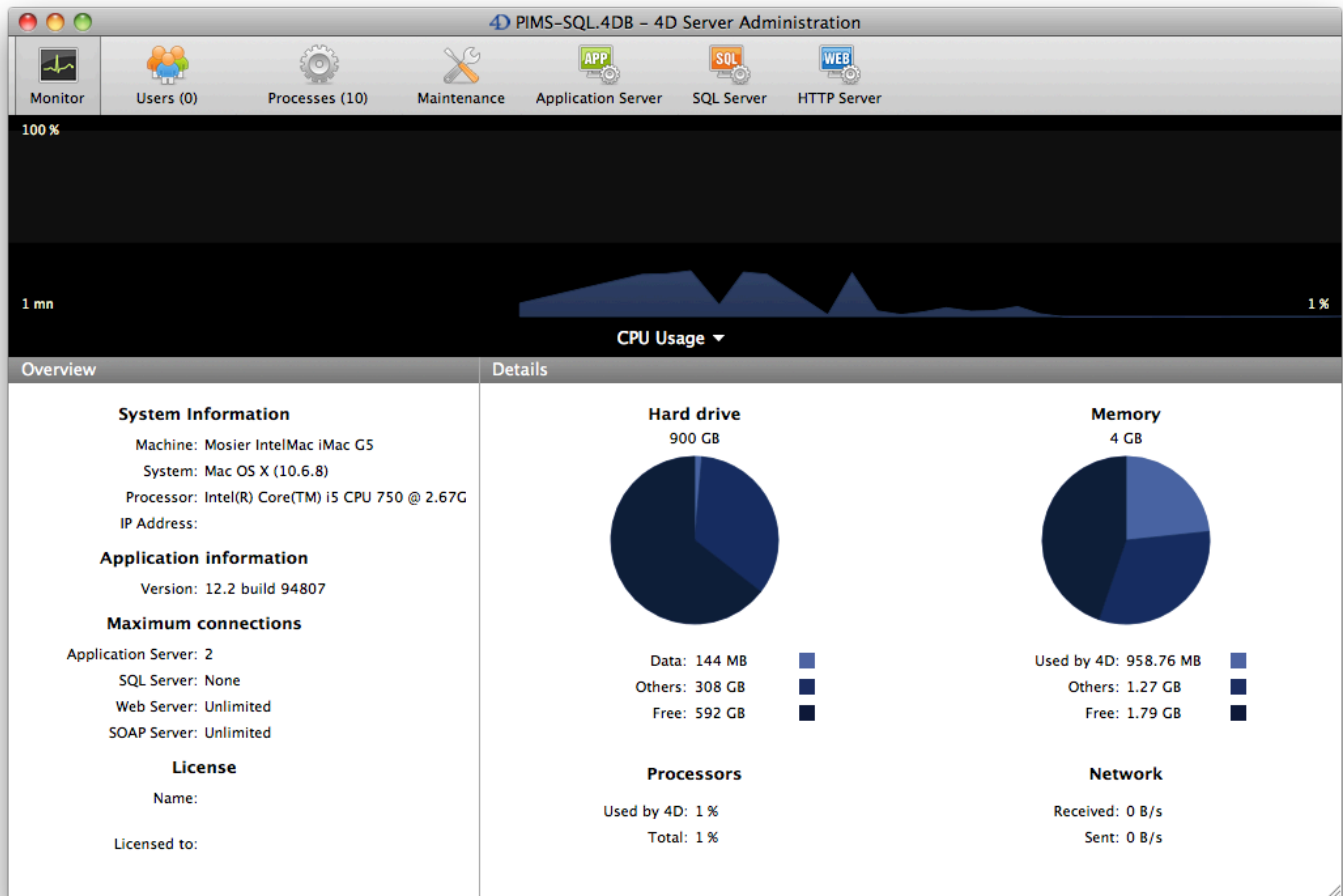
One notable difference is that there is a two-minute built-in delay before any Clients can connect. Please keep this in mind when connecting Clients. Clients still get the same basic connection dialogbox when run, that displays available PIMS-SQL Servers.

The only setting you should adjust on the server is the "Backup" settings. All others should be left alone unless directed by ExecUtron. Failure to abide by this could cause performance and Datafile issues...

To set your backup parameters, go to the Server's File menu and select " Database Settings...":
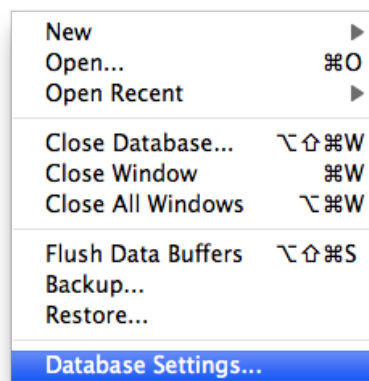
From there, select the "Backup" TAB:
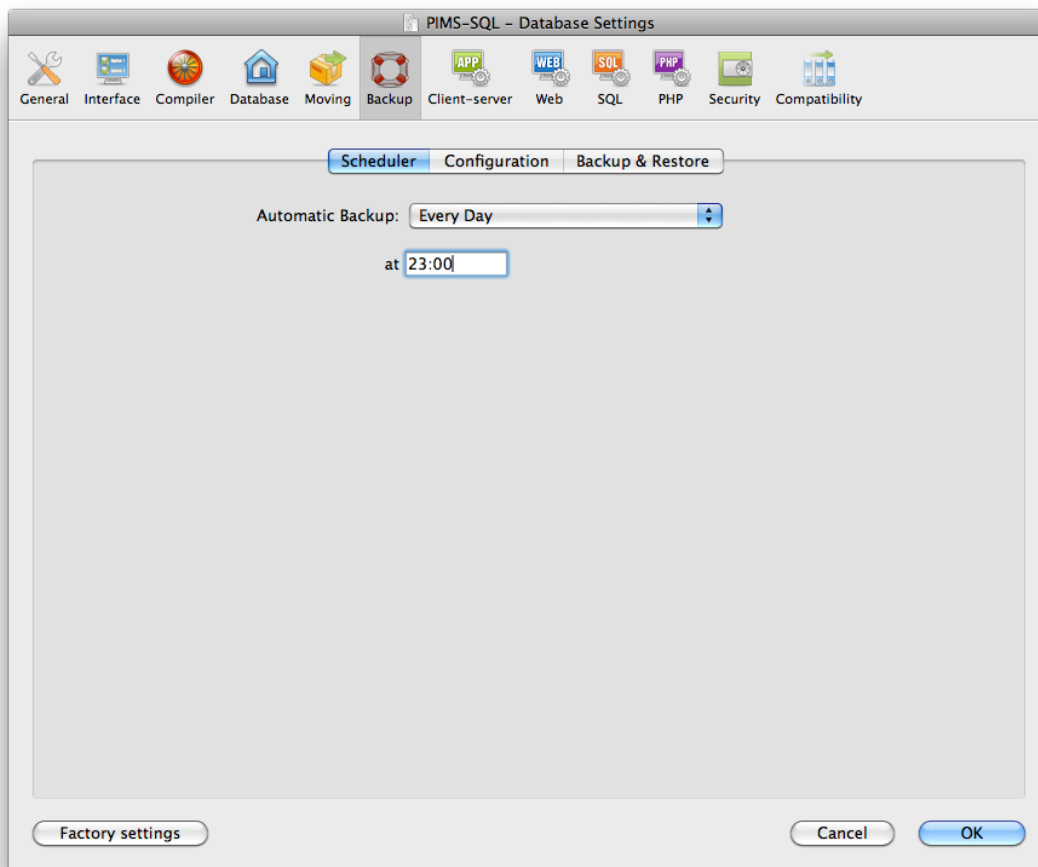
From here, the settings are pretty much the same as PIMS-X. All other "non-backup" settings are set by us, back at the factory…

It is always best to have the backup run before midnight. This is especially true for those who have directed "Nightly Processes" to run and those who have Data-Sync running between Locations.

DATA-SYNC:
Data-Sync has been re-written for enhanced performance and reliability. However, it looks and acts basically the same. The "MAIN" server Data-Sync monitor window has additional Location connection information at the bottom, and if a Location that had previously connected has gone silent for 20 minutes or more, and optional e-mail can be sent.

One of the most important changes to Data-Sync is a built-in "hold" between the hours of 10:30pm and 11:59pm. Data-Sync can be instructed (at each Location) to sleep between those hours. By doing this, it takes a big load off of the server and allows it to backup 10 times faster as well as clear processor time for any defined Nightly Processes:
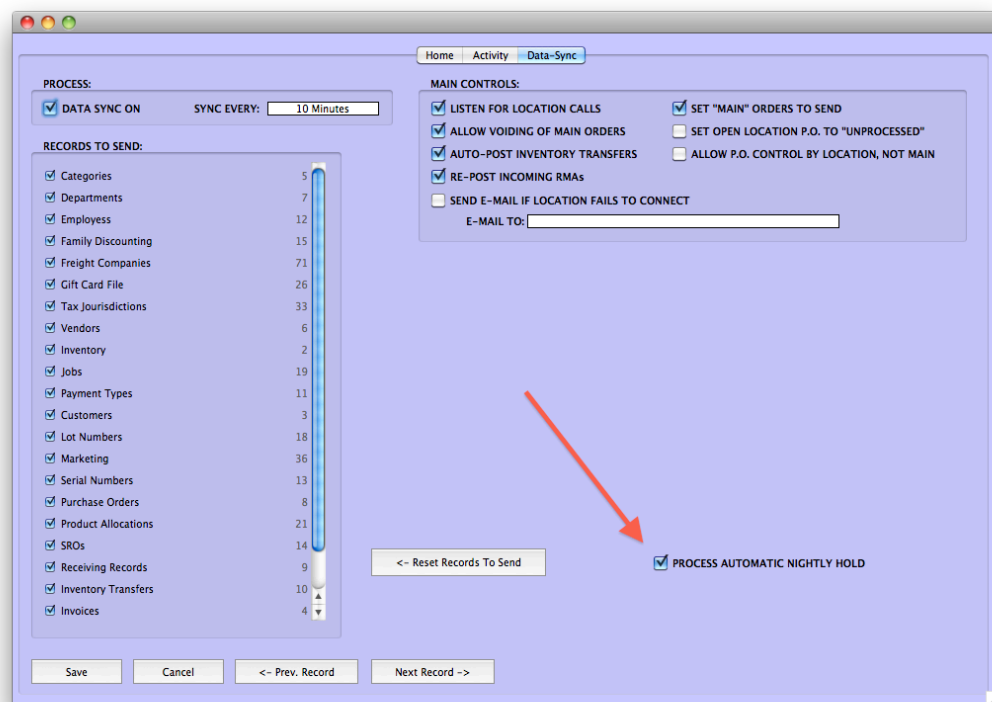
This function can be initiated by clicking the "PROCESS AUTOMATIC NIGHTLY HOLD" checkbox on the Location record of the Location running Data-Sync (at each Location). This is strongly recommended. If this option is selected, the PIMS-SQL server should be restarted.

INITIAL "VERSION HISTORY":
The following excerpt is from the initial PIMS-SQL "Version History" document. We're including it here because it states some of the differences between PIMS-X and PIMS-SQL…

* *
All "Product Name" fields have been increased from 80 characters to 200.
* *
The following functions have been removed from the main "File" menu, and are now accessed from a new "PIMS Tools..." menu:

     Master Applicator
     Change Passwording
     Restart PIMS
     Current Backup Stats
     Current Server Information
     4D Preferences

There are also new functions related to Maintenance ("4D Tools", etc.) that can be found here as well. A new Password Group called "PIMS_Tools" now exists, and only those assigned to it can access PIMS Tools.
* *
The "Records With Components..." menu item under the "Inventory" menu now has sub-menus for the various types of Inventory records that might have Components present.
* *
Certain record listings now have a standard "List Search" field in the upper left-hand corner. It will usually perform a Keyword search on the "Name" field.

On a record listing, you no longer need to select a record first before selecting
"Select All" from the "Edit" menu.
* *
The way in which Components are added to an Inventory record has changed
slightly.
* *
A new style of synthetic ExecULock system is in place. Previous "ExecULocks"
are no longer valid with this version.
* *
A window is now displayed when running on a Daily Pass (lower right-hand corner).
* *
"ExecULock" technology has been updated, and replaced with on-line "Authentication"...
* *
From the "Log-In" screen, you can now expand the height of the window, sort
Users, and search for a User in the list.
* *
When running PIMS for the first time after an update, a "New Version" sticker
is displayed on the main splash-screen. Clicking this sticker will download
and display the current Version History document which details the changes to
the program. This sticker is only displayed once per update.
* *
The "Graphing" function has been removed from the main "Inventory" menu.
* *
A new function called "Simple Labels..." has been added to the Inventory Listing
"Function" menu.
* *
All "Search Editors" have been changed from the standard "4D" version to the new
improved "EDC" version, complete with field search etc.
* *
The "Date Selectors" have been modified.
* *
There is a new option in PIMS Preferences called "This Is A Remote Internet
Terminal" (front page at bottom). This option exists for those who use a PIMS
Client to connect over the Internet to the PIMS-SQL Server. If checked, it will
modify the Client for better performance over the Internet. This is done by
disabling certain internal functions, causing specific reports to be performed
on the server and then transferred to the Client when finished, etc. This
function is terminal specific.
* *
The "Custom Splash Screen" option in PIMS Preferences has been moved to its own
menu. You now have the capability to choose from various "Themes", including
a "Custom" picture and a Splash Screen with a default WEB page. This setting is
also terminal specific.
* *
If you have "Perform Keyword Search On 'NAME' Fields" checked in PIMS
Preferences, a new high-speed SQL "Keyword" search will now be performed on the
following entry fields:
          Order "Bill-To" Name
          Order "Ship-To" Name
          Order "Bill-To" Attn
          SRO "Bill-To: Name
          SRO "Bill-To: Attn
This is a magnitude faster than PIMS-X...
* *
If "Perform Keyword Search On Order Description" is checked in PIMS Preferences,
a new high-speed SQL "Keyword" search will be performed on the Order's
Line-Item "Description" field with the text entered.
* *
The Forms Designer Module has been completely rewritten, and is more compatible
with today's printing solutions.
* *

The "Receiving" menu's "Find By Serial#..." function has had a performance increase of several thousand percent...

* *

The Order records can now have an unlimited number of attached documents. Each document can be up to 20MB in size, and will not affect performance. There is a conversion function to translate existing documents over to this format.

* *

There is now a "Date Selector" control next to the Order "Date" field.

* *

Clicking on the Order# on the Order entry screen will now place the Order# on the Clipboard/Pasteboard.

* *

The "TOTAL SALES GRAPH" function under the "Reports" menu has been renamed "12 Month Sales Graph". It has been altered to prompt for a starting month. The graph and associated figures are then based on a 12 month period starting with that month. "Last Year" is now represented as the same range from a year prior. This is great for Users on a "non-calendar" fiscal year...

* *

The Order Document storage feature has been further enhanced. Double-clicking on a line will now export (dump) that document. The Date, Time, and Terminal of the last "Dump" is also recorded.

* *

There is now Document Storage (similar to Orders) on the Purchase Order.

* *

You are now prompted to save the Purchase Order record when printing it. You can decline if desired.

* *

The record "Search" control object has been added to the top of the Order listing. It searches "BNAME", "SNAME", "BATTN", and "SATTN" fields for a match.

* *

There is a new function under the Order screen's "eBusiness" menu called "E-Mail As PDF Attachment...". This will act just like the "E-Mail Order" function, except that it will automatically print a PDF version of the Order to the DeskTop (no dialog windows), and attach it to your e-mail instead of the HTML version. Once sent, the PDF is deleted from the DeskTop.

* *

The Location Codes shown on the main Splash-Screens have been changed from 18 point font to 24 point font (for our blind Indiana Users).

* *

The Location GSX Preferences now has a default "PART RETURN WINDOW" field. If left at zero, it defaults to the original 13 days.

* *

There is a new function under the Order's and SRO's "Records" menu called "Log Contact Record...". This will allow you to log a "Contact" record for the associated Customer (just like on the Customer record). The keyboard shortcut is "Command-K". From the Order, the Order must be saved or the new Contact will not be saved. On the SRO, the Contact record is always saved.

* *

There is now a full-blown GSX WEB browser built into the SRO entry screen. It uses new defaults to display the GSX Log-On page, and then allows you to conduct GSX WEB activities directly on the SRO screen. There's also macro buttons that will insert PIMS SRO record info into selected WEB fields for you. Just click in a WEB field and then click the button representing the information you would like pasted into that field. Before this new function is available, you must go to the GSX Preferences screen for that Location and enter a few pieces of information. This includes selecting the appropriate GSX URL (usually https://gsx.apple.com).

* *

There is a new "PIMS WiKi" Module and functions in PIMS-SQL. This allows someone who belongs to the "WiKi_MODULE" Password Group to create "WiKis" for Users to access throughout PIMS. WiKis can have a "Question", "Answer", and "Subject" along with optional attached Picture, Document, and WEB URL link. WiKis are available to Users via an "Eye Glasses" ICON, found on various screens and menus. You can add as many Wikis to your system as you like. ExecUtron also has some WiKis that you can import, that explain various functions and reports within PIMS-SQL. When you first launch your system, and there are no WiKi records, PIMS will add a few for you to get started. WiKi's are a great place to add special directions for your Users, printer configurations, and even a great place to store and distribute any custom Plug-Ins you might have.
* *

The SRO entry screen and listings are now 1100 pixels wide (100 more than other PIMS screens). This is to accommodate the embedded WEB pages...
* *

"Realtime Holding" has been removed from the system. "Holding" when saving an Order record is vastly superior and should be used instead.
* *

A new function called "Admin Process Window..." has been added to the "Reports" menu.
* *

When using the new "E-Mail As PDF Attachment..." function from an Order, there is a new addition to the process. If you have a Forms Designer template that is named exactly the same as the Order template being used, except that it ends in "-PDF" instead, it will be used as the attached PDF Order. For example, if your default Invoice template is called "Invoice.tmpl" and you also have one named "Invoice-PDF.tmpl", the "Invoice-PDF.tmpl" will be used instead. Again, this only works from the "E-Mail As PDF Attachment..." menu.
* *

A new "External Reference#" field has been added to the General Ledger entry screen. This optional field exists just incase you need to match your accounts with an external system (your CPA's?). This Reference has also been added to the General Ledger listing (in green), right below the Account#. This is also included in the "Export" button found on the Trial Balance screen. When entering Accounts onto a General Journal screen, you can use this Ref# in the Account Code field to enter that COA as well.
* *

There is a new function for the "Nightly Processes" that will record the ending Inventory figures for Inventory records in a special table. This information constitues the ending "ON-HANDs, HOLDING, etc. totals for a given product per Location per month. To list these figures, choose "Month-End Inventory..." from the main "Reports" menu. These figures always represent that day's starting figures for your Inventory.
* *

The General Journal entry screen now has Import/Export buttons to export the line-items (transactions) as text. As long as the structure of the export is not altered, it can be imported back on to another General Journal screen. This is handy if you are needing to leave this screen and come back to finish a long entry later. It is also good for "prototyping" a booking to see the "What If" of it before posting. This is often done in a resent copy of your datafile...
* *

A listing Search Control has been aded to the General Ledger listing.
* *

You can now add a Chart-Of-Account (General Ledger) record from the General Journal entry screen.
* *

There is a new menu function in the Location Module (Data-Sync menu) called "Grab Data-Sync Screen-Shot". When selected (from a Client app), a screen-shot of the server's Data-Sync Monitor window will be displayed. This image can be up to 10 seconds old, as it is updated every 10 seconds on the server.
* *

There is now a Location listing with last connection info on the Data-Sync
Monitor window ("MAIN" only). This shows the last connection info for each
Location in the system. There is also a new option on the "MAIN" Location
record to alert you by e-mail if a Location that was connecting hasn't connected
for 20 minutes or more. When an e-mail is sent, a screen-shot of the Monitor
window is attached.
****
There is a new checkbox on the "Custom Splash Screen" window called
"Random Daily Splash Screen". If checked, you will get a different Splash Screen
for every day of the month...
****
The "Keyword Search" button has been removed from the Order entry screen, as it
is now obsolete.
****
There is now an optional "Category Code" on the Inventory Reconciliation
worksheet. This allows you to isolater and count only items that belong to the
same PIMS Category. Discrepancies are only compared to items of that Category.
This is an optional feature.
****
There is a new "Prep" menu in the Locations Module. A function exists there
that will allow you to take a copy of your "MAIN" datafile and prepare it for
another new Location.
****
When the "E-Mail Order" dialogbox is displayed, the "TO", "CC", and "BCC"
pop-menu fields now contain not only the Order's e-mail addresses but all of the
Customer's "Additional personnel" and "Locations" e-mails (if they exist).
****
It is now possible to "Batch Create" a single Gift Card, where before you had to
create 2 or more...
****
All "Location" pop-menus now show only non-virtual Location Codes. There are a
few exceptions, like Inventory Transfers.
****
During a datafile backup process while Data-Sync is running, a "non-connection"
e-mail will no longer be sent during this process. This will only take place if
the system is not currently backing up.
****
A new option on the Location record's Data-Sync section exists called
"PROCESS AUTOMATIC NIGHTLY HOLD". When checked, Data-Sync is paused between the
hours of 10:30pm and 11:59pm. This allows more processor time to task intensive
"Nightly Processes". If used, your backup start time should be set for 11:00pm.
****
A better alert system now exists for entering "Discontinued" items to an Order.
If your Location is out of stock on this item but other Locations have it in
stock, then you are alerted to this fact in a more detailed manner.
****
There is a new function under the SRO's "Deposits" menu called
"Refund SRO Deposit...".
****
On the Purchase Order listing, the "Dealer#" has been replaced with the
"Confirmation#".
****
The "Document Storage" for both Customers and Inventory has been updated.
Documents are now kept in another file, outside of the original records. This
gives a performance increase, especially for records with lots of Documents
attached. You'll need to run a conversion function to update your existing
attached Documents, before you can take advantage of this...
****
SROs can now store attached Documents. This function can be found in the
"RECORDS" menu as "Attached Documents...".
****

There is a new report in the Reports menu called "Daily Revenue Export...".
This report exports sales information (from selected Invoice "Subtotals") for
a given date range for one or all Locations. If "All" Locations is selected, a
summary grid is placed at the bottom of the export.
* *
* *

END OF DOCUMENT