Elliott V7.5 Upgrade Instructions for V7.x Users

1. If you have Elliott custom modifications, please contact your developer to determine if your current modification is compatible with Elliott V7.5 before proceeding with this upgrade.
2. Make sure you are current with Elliott maintenance before proceeding with this upgrade. *If your Elliott maintenance has expired, installing this upgrade may cause your Elliott system to stop functioning!* This would require you to restore your original Elliott system from backup or renew Elliott maintenance with Netcellent.
    o If you are on V7.1 - V7.3, you can find your Elliott maintenance expiration date by starting Elliott and clicking on "Setup Preference" on the tool bar. Go to the "Diagnostic" tab and click the "Environment" button.
    o For V7.0, call your reseller or Netcellent to find out if your maintenance has expired.
3. Make sure you write down where your Elliott V7 is installed.
4. If you are upgrading from V7.0/V7.1 and you use pre-paid amount logic in COP Sales Order, take out the pre-paid order information before upgrading to V7.5. Enter the pre-paid information again after upgrading to V7.5.
5. Perform a complete backup of your Elliott V7 directory before proceeding with this upgrade.
6. *Ensure all users exit Elliott so no Elliott program files are open during the upgrade process.*
7. Insert the **Elliott V7.5 Update CD** into your CD-ROM. Do not insert the Elliott V7.5 Full Installation CD. You may receive a full installation CD for disaster recovery.
8. As an alternative to step 7, you can download the "Elliott V7.5 Update single EXE" file from the http://www.elliott.com website support area. Execute the single EXE - ELI75UP.EXE.
9. The InstallShield Wizard should start. InstallShield will prompt you for a directory to install the Elliott update. By default, it will use the directory "C:\Elliott7." Change this to the directory your Elliott V7.x is installed.
10. After the installation is complete, *if the InstallShield wizard asks if you wish to reboot the system, then it means the installation was not successful* due to there are open files in the Elliott directory. In that case, click the "No" button to the reboot question and repeat steps 4 through 7.
11. If the installation completes successfully, start Elliott and you should see the message "Starting Elliott V7.5" to confirm that you upgraded to Elliott V7.5.
12. *Please review the Global Default Security settings in each company* to make sure the new Global Security flag default settings in V7.5 are consistent with your expectations. To review the Global Security flag default settings, start Elliott and login as SUPERVISOR. From the main menu, choose "Util-Setup" -> "Password Setup." Then choose "Global Security" -> "Global Default Security." You should pay special attention to the following flags:
    o Create Credit Memo in Order Entry (V7.3)
    o Create COP Credit Memo From Invoice History (V7.3)
    o Change COP Order After Picking Ticket Printed (V7.3)
    o Allow to Override Terms Code in Order Entry (V7.3)
    o Allow to Override Salesman In Order Entry (V7.3)
    o Allow to Override Disc Pct in Order Entry (V7.3)
    o Allow to Override Line Item Unit Cost (V7.3)
    o Allow to Override Order Commission Field (V7.3)
    o Allow User Enter Negative Qty in Order Entry (V7.4)
    o Allow Delete to Other's Attribute (V7.4)
    o Allow User to Enter Adjust Amt in AR Re-Apply (V7.5)
    o Allow User to Change COP Incomplete Order (V7.5)
    o Allow User to Change COP Order W/Shipping Trx (V7.5)

These are functions that user was able to access before upgrading. Now these flags default to "N" = No Access which may causing user to receive an security message when they try to

perform the same function. Therefore, please review very carefully of this list. The (V7.X) in the above list indicate the security flag was introduced in that particular version. If, for example, you are upgrading from 7.4 to 7.5, then you only need to pay attention to the one that has (V7.5). If you would like to grant all users access to one of these functions, change the flag to "Y". If you wish to only let a few users perform one of these activities, you can leave the flag as "N" in the Global default and go to "User Global Security" to set the corresponding flag to "Y".

13. *Delete Some Work Order Plus Files*. If you are upgrading from 7.4, there are certain work order plus files were released prematurely. These files need to be removed and let the 7.5 system create them automatically:

- BMLABGRD.BTR
- BMRTGFIL.BTR
- BMWCFIL.BTR
- SYOPRFIL.BTR

These files can be found in Elliott7 DATA directory. You can use Windows explorer or command prompt to delete them after upgrading to 7.5. If they do not exist, they you can skip this step. Apply this step to all companies corresponding DATA directory.

14. *Determine if Warehouse Receiving Data Files need to be converted*. You may skip this step if you are upgrading from Elliott 7.4. Warehouse Receiving is an add-on feature for the PO module. If you were using this feature in the past, the data files will need to be converted. If you were not using this feature, you can simply delete the files (POWHREC?.BTR in the DATA directory) and let the system automatically initialize them.

- If you were not using PO Warehouse Receiving, see if you have the following files in each DATA directory: POWHRECI.BTR, POWHRECS.BTR, POPURECI.BTR, POPURECS.BTR. If they exist, simply delete them.
- If you were using PO Warehouse Receiving and there is data in those files, then you will need to convert these files by using the CONVWHRV utility.
    o Bring up a command prompt.
    o Go to the Elliott root directory by changing the drive letter and using the CD command.
    o Type "MSPL=Fix" and hit Enter.
    o Start Elliott by typing EL700
    o After the login and choosing the proper company, the system will ask "Program to Run". Enter "CONVWHRV".
    o Repeat this process for each DATA directory.

15. *Import new Laser Templates.* Elliott V7.4 supports an expanded laser invoice form 90. 7.5 supports and expanded laser PO form 98. If you have not modified Elliott laser templates in the past, you can simply rename or delete NWSMFORM.BTR from each DATA directory. When you start Elliott, a new NWSMFORM.BTR with the latest update will be created. If you did make modifications to the laser form templates, then you should import the new laser templates. The easiest way to do this is to following the following procedure:

- Go to Customer Order Processing -> Processing -> Print Duplicate Invoice
- Enter any invoice number (even if the invoice number does not exist).
- At the print options window, click the "Options" button.
- In the Appearance Option window, choose a template from the "Form Template" drop down other than "00 No Form." Click the "Edit Form" button.
- In the Elliott Laser Form Designer window, choose "Import." Click "No" to save the current template. Accept the default directory and click on "Browse" and you will see a list of templates supported by Elliott.
- Since there is no easy way to know which templates are already installed and modified, we suggest you choose each template individually. If the system gives you a warning that the

imported template already exists, then you can choose to skip this template and avoid overriding your modification. If you always copy a template to your own template ID before modifying it, then you can safely import all the templates.

- Close the Elliott Laser Form Designer window without Save. In the Appearance Option window, click "Cancel." In the Print Options window, click "Cancel" to exit.

16. If you are an Elliott 7.4 user, you may skip this step. If you are using the Standard Cost method and you have a zero standard cost item (expense item) where you do not wish to track purchase variance, you must go to the I/M Material Cost Type Loc Account File and bring up the material cost type/location record and indicate you don't want to "Use Std Variance". In Elliott V7.5, zero standard cost does not imply expense items and you must set up the proper material cost type/location record to indicate you don't want to "Use Std Variance" for the particular material cost type.

17. Please read the Elliott V7.5 release notes (Release7.doc in your \Elliott7 directory). Especially, pay attention to "Areas Requiring Attention When Upgrading to V7.5". Many of the user manuals have been updated to reflect the new features since V7.0. You may find the updated manuals in the \Elliott7\DOC directory. You are now ready to use Elliott V7.5.