

# Version 6.4 Upgrade Guide

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## **Installation Overview**

The MISys Manufacturing program actually consists of four separate components:

- 1. MISys Client
- 2. MISys Server
- 3. MISys Server Administration Console
- 4. Microsoft SQL Server Express Edition

Depending on the deployment options you choose, these components may be installed together or separately.

**For Installations outside of North America:** Microsoft SQL Express Edition is designed for the North American region computing environment only. If you intend to use the MISys Manufacturing System outside North America, we require that you use your own installed copy of Microsoft SQL Server 2008 or later.

## Single PC Deployment

If you wish to deploy the MISys Manufacturing System on a single computer, the installation program will install the required components on your computer at the same time.

## **Company Intranet or Internet Deployment**

If you wish to deploy MISys Manufacturing on a company intranet/LAN (or over the Internet) with the MISys Manufacturing programs and data residing on a central server, the installation program will install the required components with their default settings on the server.

## **Custom Deployment**

If you wish to deploy MISys Manufacturing on computers functioning as client workstations, or on the server with custom settings, the installation program will allow you to pick and choose the components you wish to install on any given computer.

## **Installation Prerequisite**

You must have Microsoft Windows .NET Framework v4.0 Extended installed for both a single PC deployment or for company intranet or Internet deployment. Normally, this is installed automatically as part of your Windows installation. If the Windows .NET Framework is not installed, the installation of MISys Manufacturing cannot complete. You can download the .NET Framework from the Microsoft web site.

## **Upgrading From Previous Versions of MISys**

Follow these instructions if you already have MISys installed and are ready to upgrade to version 6.4. In this process, you can review the available deployment option you have chosen in the past and decide whether it is still the best option for you.

## **Upgrading From MISys Versions Prior To 6.3**

If you are upgrading from v6.2 or earlier, you will not be prompted by the installer during the MISys Server installation to convert the database. You will need to perform the conversion manually after performing the following procedure. To do this, log into MISys Server Administration and then select Migrate (or you can prompt to convert by performing a restore of an older database version).

## **Record Your Current Server Connection Parameters**

**Important:** Before you install any new software make sure you record the MISys Client's connection to the MISys Server. You may need this information in the process of installing MISys Manufacturing version 6.4.

Double-click the MISys Client icon and the Client Login window will open.

From the MISys Client Login window, click Edit | Server Connection and the following window will open:

A MISys Manufacturing Server Connection	×
O Single User Single PC	
Internet or Internet connection	
C Local Acro Natural (LAN) according	
C Local Area Network (LAN) connection	
URL of the MISys Manufacturing Server	
http://localhost/sbmwebservice64/miwebservice.asmx	
Company Group	
OK Cancel Help	

Make a careful note of the information you see in this window. You will need it again when installing MISys Manufacturing version 6.4.

If the MISys server is located on a different computer accessed through the Internet or your company intranet, make a note of the URL of the MISys Server.

When you have recorded this information, click the **Cancel** button to return to the Login window, and then click the **Exit** button to close the Login window.

### **Back Up Your MISys Manufacturing Data**

Before proceeding with the upgrade of your MISys Manufacturing System, make sure you have a current backup of your data.

On the computer functioning as the MISys Server, double-click the MISys Server Administration icon and the window will open as follows:



Enter the password which, unless you change it, is "**password**", then click the **Log In** button. When the Server Administration window opens, navigate to the **Companies** tab.

s								
le								
Owner	Companies	Licenses	System	Currency				
Org	ganization Id	Company Na	me Users	Logged In	Database Size (kbyt	Last Backup Da	t Group	
► M	IISAMPCO	Sample Com	ра		81,920			
	New		Delete		Refresh	Солие	ert Database	
	New Backup		Delete		Refresh Reset User	Conve	ert Database te Databases	
	New Backup Backup As		Delete Restore estore From		Refresh Reset User Edit Group	Conve Migra	ert Database te Databases ation History	
	New Backup Backup As		Delete Restore estore From	ı	Refresh Reset User Edit Group	Conve Migra Migra	ert Database te Databases ation History	
	New Backup Backup As		Delete Restore estore From	l	Refresh Reset User Edit Group	Conve Migra Migra	ert Database te Databases ation History	

Click to select the Company database you wish to back up, then click the **Backup** button. A quick backup is made to the Backup Folder specified on the **System** tab. Click **OK** to acknowledge the completion of the backup.



If you would rather specify a target folder or filename other than that specified on the **System** tab, click the **Backup As...** button. This will take you to the familiar Windows "Save As..." dialog where you can enter a file name and location.

## **Download MISys Manufacturing Version 6.4**

Download the MISys Manufacturing v6.4 installation package from the MISys Web Server at:

http://www.misysinc.com/support/downloads/misysmfg.exe

and copy it to your Windows Desktop or other easily-accessible location.



**Important:** When you are given the opportunity to start downloading the MISys Manufacturing Installation Package, make sure you select the **Save** option and save the package to your Windows Desktop or other equally identifiable folder. **DO NOT** select the Run option.

## Upgrade Microsoft SQL 2005 to Microsoft SQL 2014

Microsoft no longer supports SQL 2005 and as of v6.4 of MISys Manufacturing, neither do we. If you are using your own SQL Server or if you initially purchased MISys Manufacturing before version 6.1 (June 2013) you may still be using Microsoft SQL 2005.

If this is the case, you will need to install a newer instance of Microsoft SQL Server (2014 being recommended). You can obtain information on the steps to follow in this case by visiting our Knowledgebase > Installation > "How to: Upgrading Earlier Versions of SQL Express to SQL Express 2014". You can visit our Knowledgebase at <u>https://misysinc.com/helpdesk/knowledgebase.php</u>. Alternatively, you can contact our technical support department (installsupport@misysinc.com).

## **Install MISys Manufacturing Version 6.4**

## Special Note about Installing MISys Manufacturing on Windows Vista, Windows 7 or Windows 10

When installing the MISys Client or MISys Server on PCs running Windows Vista or newer, we recommend installing in the ...\Program Files (x86) folder or in a new folder (that you create) at the root of the primary drive. For example, you can create a folder in the root named "MISys Manufacturing". This will avoid any issues imposed by UAC (User Access Control) limitations for modifying files in sub-directories of the standard Windows 'Program Files' directory).

**Note**: you need to use the MISys Manufacturing custom installation options to be able to change the default installation directory. Shortly after launching the MISys Manufacturing Installation program, a window similar to the following will open:



Extraction of the MISys Manufacturing Setup programs takes a few minutes. Please be patient. When the process is complete, the following window will appear:

MISys Manufacturing 6.4 - Instal	IShield Wizard	$\times$
2	Welcome to the InstallShield Wizard for MISys Manufacturing 6.4	
v 6.4	Please close all other programs while installation is in progress, including any anti-virus software.	
	< Back Next > Cancel	

Click the Next button and the MISys Manufacturing End User License window will appear:



Please read the MISys End-user License Agreement (EULA) carefully. If you do not accept its terms, click **Cancel** to terminate the installation of MISys Manufacturing.

If you accept the terms of the EULA, click the radio button to acknowledge your acceptance, and then click the **Next** button. The following window will open:

MISys Manufacturing 6.4 - InstallShield Wizard	×
Customer Information Please enter your information.	
User Name:	
John Smith	
Company Name:	
MISys, Inc.	
Install this application for:	
<ul> <li>Anyone who uses this computer (all users)</li> </ul>	
Only for me (John Smith)	
InstallShield	
< Back Ne	xt> Cancel

٢

Unless you have a specific reason for doing otherwise, we recommend that you select the option to install this application for anyone who uses this computer (all users).

Enter your User Name and Company Name in the fields provided and click the **Next** button. The Setup Type window will appear as follows:

MISys Manufacturing 6.4 - InstallShield Wizard	×
Setup Type Select the setup type that best suits your needs.	
Click the type of setup you prefer.          1) Simple Single-user Installation         2) Complete Multi-user Installation         3) Custom Client/Server Installation	Description Select this option if you wish to install a single-user version of MISys Manufacturing on a single workstation running Windows Vista or newer or on a server running Windows Server 2008 or newer.
InstallShield	<back next=""> Cancel</back>

#### **Option 1: Simple Single-user Installation**

Select this option if you wish to install a single-user version of MISys Manufacturing on a single computer. This option installs all four components of MISys on the same computer. The benefit of this installation option is that it does not require Microsoft Internet Information Services (IIS). However, this limits you to running in single-user mode.



If you select the Simple Single-user Installation option now and wish to upgrade to a Multi-user installation later, you can do so by uninstalling MISys Manufacturing and reinstalling it.

Click to select option 1) Simple Single-user Installation, then click the Next button.

#### **Option 2: Complete Multi-user Installation**

Select this option if you wish to install a multi-user version of MISys Manufacturing on a computer designated as the MISys Server with the default settings.

MISys Manufacturing 6.4 - InstallShield Wizard	×
Setup Type Select the setup type that best suits your needs.	
Click the type of setup you prefer.          1) Simple Single-user Installation         2) Complete Multi-user Installation         3) Custom Client/Server Installation	Description Select this option if you wish to install a multi-user version of MISys Manufacturing on a single workstation running Windows Vista or newer or on a server running Windows Server 2008 or newer. This machine will be the MISys Manufacturing Server that all client machines will connect to. Note: This option requires Microsoft Internet Information Services (IIS), so if you are installing on a workstation, it will need to be the Professional edition.
InstallShield	< Back Next > Cancel



If you wish to use an existing database server, or wish to install MISys Manufacturing in a non-default folder, you should use the Custom installation option.

Click to select option 2) Complete Multi-user Installation, then click the Next button.

Whether you select 1) Simple Single-user Installation or 2) Complete Multi-user Installation, the following window will appear so you can review the choices you have made for installing MISys Manufacturing on your computer:

MISys Manufacturing 6.4 - InstallShield Wizard	×
Start Copying Files Review settings before copying files.	
Setup has enough information to start copying the program files. If you we change any settings, click Back. If you are satisfied with the settings, clic copying files.	ant to review or ck Next to begin
Current Settings:	
Name: John Smith Company: MISys, Inc. Installation Directory: C:\Program Files (x86)\MISys\MISys SBM\	^
<	>
InstallShield	> Cancel

If you wish to proceed with the installation as indicated, click the **Next** button. When you do, the various components of the MISys Manufacturing package will be installed on your computer's hard drive.

MISys Manufacturing 6.4 - InstallShield Wizard	×
Setup Status	
MISys Manufacturing 6.4 is configuring your new software installation.	
Copying new files	
InstallShield	Cancel

When all the components of the MISys Manufacturing System are installed, the following window appears:

MISys Manufacturing 6.4 - Inst	allShield Wizard
	InstallShield Wizard Complete Setup has finished installing MISys Manufacturing 6.4 on your computer.
v 6.4	
	< <u>B</u> ack <b>Finish</b> Cancel

Click the Finish button to close the window and return to the Windows desktop.

### **Option 3: Custom Client/Server Installation**

If you wish to deploy MISys Manufacturing with some computers functioning as client workstations, another computer functioning as a server, and possibly another computer running the MISys Server Administration component, the installation program will allow you to pick and choose which components you wish to install on any given computer.

MISys Server module requires Microsoft Internet Information Services (IIS).

After launching the MISys Manufacturing Installer, start the installation as described above until you reach the Setup Type window:

MISys Manufacturing 6.4 - InstallShield Wizard	Х
Setup Type Select the setup type that best suits your needs.	
Click the type of setup you prefer.	
1) Simple Single-user Installation 2) Complete Multi-user Installation 3) Custom Client/Server Installation	Description Select this option if you wish to install individual client, server, and server administration components of MISys Manufacturing, choose a specific installation folder, or select a particular database server. Note: this option requires Microsoft Internet Information Services (IIS). This option can also be used to install without SQL Express 2014, which will allow installation on older operating systems.
InstallShield	
	< Back Next > Cancel

Click to select option **3**) **Custom Client/Server Installation**, then click the **Next** button. The Destination Location window will open as follows:

MISys Manufacturing 6.4 - InstallShield Wizard		×
Choose Destination Location Select folder where setup will install files.		
Setup will install MISys Manufacturing 6.4 in the	e following folder.	
To install to this folder, click Next. To install to a another folder.	a different folder, click Browse and select	
Destination Folder		
C:\Program Files (x86)\MISys\MISys SBM\	Browse	
InstallShield	< Back Next > Car	ncel

Click the **Next** button to proceed to the Select Features window:

MISys Manufacturing 6.4 - InstallShield Wizard	X
Select Features Select the features setup will install.	
Select the features you want to install, and deselect the fe Simple Single-user Installation MISys Manufacturing Client MISys Manufacturing Server Microsoft SQL Server Express Edition MISys Manufacturing Server Administration Const	eatures you do not want to install. Description Select this option if you wish to install a single-user version of MISys Manufacturing on a single computer. Note: This option does not require Microsoft Internet Information Services (IIS).
813824.14 MB of space available on the C drive	
< Bac	k Next> Cancel

To choose the components you wish to install, follow these steps:

#### Install the MISys Server Component

Start by installing the MISys Server component on your network server. Since you do not need the MISys Client modules on your server, you can clear the checks from these boxes, leaving only the checks for MISys Server, Microsoft SQL Server Express Edition, and MISys Server Administration Console. It is recommended to keep the MISys Manufacturing Client checked so that you can also access MISys Manufacturing from the server.

MISys Manufacturing 6.4 - InstallShield Wizard	×
Select Features Select the features setup will install.	
Select the features you want to install, and deselect the fe Simple Single-user Installation MISys Manufacturing Client MISys Manufacturing Server MISys Manufacturing Server Edition MISys Manufacturing Server Administration Const	eatures you do not want to install. Description Select this option if you wish to install the MISys Manufacturing Server on this computer. Note: This option requires Microsoft Internet Information Services (IIS) to be installed.
S8.45 MB of space required on the C drive 813823.77 MB of space available on the C drive InstallShield	
< Bac	k Next≻ Cancel



When installing a multi-user version of MISys Manufacturing, you must first install the MISys Server component on your network server. Once the server is set up, you can proceed to set up each client workstation.

The MISys Manufacturing Server Administration Console is an optional component that you should install on the network server. You will need the console to make backups and perform other maintenance on your system.

When you are ready to proceed, click the Next button.

When the following window appears, review the choices you have made for installing the MISys Server on your computer.

MISys Manufacturing 6.4 - InstallShield Wizard	×
Start Copying Files Review settings before copying files.	
Setup has enough information to start copying the pro- change any settings, click Back. If you are satisfied w copying files.	gram files. If you want to review or ith the settings, click Next to begin
Current Settings:	
Name: John Smith Company: MISys, Inc.	^
Installation Directory: C:\Program Files (x86)\MISys\M	ISys SBM\
	~
``	/
nstallShield	
<	Back Next > Cancel

If you wish to proceed with the installation as indicated, click the **Next** button. When you do, the various components of the MISys Server component will be installed on your computer's hard drive. There is nothing else you need to do until the following window appears:

MISys Manufacturing 6.4 - InstallShield Wizard			
	InstallShield Wizard Complete Setup has finished installing MISys Manufacturing 6.4 on your computer.		
v 6.4			
	< Back Finish Cancel		

Click the Finish button to close the window and return to the Windows desktop.

#### **MISys Manufacturing Client**

If you are installing MISys Manufacturing on a client computer, you do not need the MISys Server, Server Administration, or Microsoft SQL Server Express database engine components, so clear the checks from these boxes.



The MISys Manufacturing Server Administration Console is an optional component that you may, or may not, wish to have installed on the client computer. When in doubt, install it anyway.

When you are ready to proceed, click the Next button.

There is nothing else you need to do until the following window appears:

MISys Manufacturing 6.4 - InstallShield Wizard			
	InstallShield Wizard Complete Setup has finished installing MISys Manufacturing 6.4 on your computer.		
v 6.4			
	< <u>B</u> ack <b>Finish</b> Cancel		

Click the **Finish** button to close the window and return to the Windows desktop.

Repeat the installation on the MISys Client on each computer you wish to function as a MISys Manufacturing client workstation.

## **Re-establish the MISys Manufacturing Client Connection**

Once you have completed the installation of MISys Manufacturing on the server, visit one of the client computers, start the MISys Client and re-establish the connection to the MISys Server.



Refer to the note you made regarding the MISys SBM v6.4 client connection.

Double-click the MISys Manufacturing 6.4 Client icon to open the Login window:

🥔 MISys Manufacturing Login	- 🗆 🗙
File Edit Help	
v 6.4	MISys Manufacturing - 6.4.0.0 Company MISAMPCO   User ID ADMIN  Password
	Note: Initial login may take a few moments.
Copyright © 2007-2018 Manufacturing Information Systems, Inc. All rights reserved.	
Check for Updates Request Support Reset User	Log In Exit

In the menu bar click on Edit | Server Connection to open the Server Connection window as follows:

MISys Manufacturing Server Connection				
Single User Single PC				
C Internet or Intranet connection				
C Local Area Network (LAN) connection				
OK Cancel Help				

• If you have deployed MISys Manufacturing on a single computer, then the default setting of Single User Single PC is correct. Just click **OK** to close the window.

If you have deployed MISys Manufacturing over the Internet or a company intranet, click to select that open and the Server Connection window as will appear as follows:

A MISys Manufacturing Server Connection	×
Single User Single PC	
Internet or Intranet connection	
C Local Area Network (LAN) connection	
URL of the MISys Manufacturing Server	
http://localhost/sbmwebservice64/miwebservice.asmx	
Company Group	
OK Cancel Help	

Enter the URL of the MISys Server then click **OK** to close the window.



If you are not certain of this entry, it may help to refer to the note you made of the server connection for version 6.4. The URL is probably the same. Just remember that "sbmwebserviceXX" will need to be changed to be "sbmwebservice64".



The Company Group field is normally blank. It is only used if the MISys Manufacturing Server you are connecting to is provided by a Hosting Service instead of an installation your own company's network. Consult your network administrator if using a hosting provider and they will provide the correct group name to enter for the Company Group field.

## Test the MISys Manufacturing Client Connection

Before you go on to other client computers, test the connection by logging into the MISys Client. If you are successful and can access your familiar data, make a note of the server connection string and repeat the process with all the other client computers.

## **Re-establish the MISys Manufacturing Server Administration** Connection

Next visit one of the computers on which you installed the MISys Manufacturing Server Administration Console and re-establish its connection to the MISys Server.

Double-click the MISys Manufacturing 6.4 Server Admin icon to open the Login window:

🔆 MISys Manufacturing Server Administration Login	- 🗆 X
File Edit Help	
	MISys Manufacturing System Admin - 6.4.0.0
manuracturing	
v64	Password
V 0.4	
SERVERADMINISTRATION	
Copyright © 2007-2018 Manufacturing Information Systems, Inc. All rights reserved.	
Check for Updates Request Support Reset User	Log In Exit

In the menu bar click on Edit | Server Connection to open the Server Connection window as follows:

💥 MISys Manufacturing Server Connection	—	×
<ul> <li>Single User Single PC</li> <li>Internet or Intranet connection</li> </ul>		
OK Cancel	Help	li.

- If you have deployed MISys Manufacturing on a single computer, then the default setting of Single User Single PC is correct. Just click **OK** to close the window.
- If you have deployed MISys Manufacturing over the Internet or a company intranet, click to select that option and the Server Connection window as will appear as follows:

💢 MISys Man	ufacturing Server Connection	-	×
	<ul> <li>Single User Single PC</li> <li>Internet or Intranet connection</li> </ul>		
Server URL Company Group	http://localhost/sbmwebservice64/miwebservice	e.asmx Help	

Enter the URL of the MISys Server then click **OK** to close the window.



If you are not certain of this entry, it may help to refer to the note you made of the server connection for version 6.4. The URL is probably the same. Just remember that "sbmwebserviceXX" will need to be changed to be "sbmwebservice64".



The Company Group field is normally blank. It is only used if the MISys Manufacturing Server you are connecting to is provided by a Hosting Service instead of an installation on your own company's network. Consult your network administrator if using a hosting provider and they will provide the correct group name to enter for the Company Group field.

## Test the MISys Manufacturing Administration Console Connection

Before you go on to other client computers, test the connection by logging into the MISys Manufacturing Administration Console. If you are successful and can access your familiar data, make a note of the server connection string and repeat the process with all the other client computers.

## Check the Integrity of Your Converted Data

When you start MISys Manufacturing version 6.4 for the first time, navigate to the Administration desktop. Select Housekeeping | Check Data Integrity and the following window will appear:

🧳 MISys Manufac	turing - Sample Company Inc. (User: ADM	IN)	-	×
File Edit View	Tools Help			
	Administration  Company Profile  Company Profile  Company Company	<b>E</b> Administration » Housekeeping » Check Data Integrity		☆
	<ul> <li>Production Calendar</li> <li>Production Shifts</li> <li>Company Options</li> <li>A Housekeeping</li> </ul>	Mode         Report errors only         •           If fix error is selected, exclusive access is required!		
PLANNING	Backup Company     Change Item Numbers     Change Supplier Numbers     Delete Obsolete Items     Frenzer/Add/Remove BOM	Proceed		
PURCHASING				
PRODUCTION	<ul> <li>Update Activity Monitors</li> <li>Check Data Integrity</li> <li>Purge Master Log</li> <li>Edit Custom Fields</li> </ul>			
STOCK CONTROL				
MASTER FILES				
ACCOUNTING				
SETTINGS	< >			

Click the **Proceed** button the start the check function. If any errors are reported, change the mode to **Report and Fix Minor Errors** and repeat the process. If errors persist, please contact MISys Technical Support.

## **Requesting Installation Assistance**

If you need assistance with the installation of MISys Manufacturing version 6.4, click the **Request Support** button when you reach the Client Login window.

If you cannot open the Client Login window, please email <u>installsupport@misysinc.com</u>. or call (802) 457-4700. Our support technicians, who work from 9am to 5pm weekdays (except holidays) will respond to your request promptly.