

Upgrading to *Priority* 16

Priority Software is pleased to announce the release of **Priority** Version 16.

This upgrade will install all of the latest developments and fixes to **Priority**, based on the version and modules you are currently running. You must upgrade to Version 16 in order to receive customer support in the future.

During the upgrade process, the system will be off-line for several hours.

Notes:

- The upgrade can only be run if there are no outstanding debts to Priority Software. In order to avoid last minute surprises, we recommend that you enter **Priority** from the Windows interface and run the **Renew License program** (menu path: **System Management > System Maintenance > Software License**). When the program finishes running, a report will appear. Make sure that the date displayed in the line "Your license to run upgrades expires on" is in the future.
- Before downloading the upgrade file, make sure that the following sites have been added to the Trusted Sites zone in your web browser:
 - <ftp://ftp.eshbel.com>
 - <ftp://ftp.eshbelsaas.com>
 - <http://backoffice.eshbel.com>
- If you have purchased the **Field Service Mngmt** module and/or any of the **WMS** modules (module numbers 10, 15-17, 27, 28, 122), please contact the Priority Software support staff for further instructions, as you will need to install another update after upgrading the system.
- If your **Priority** installation runs on an Oracle database, we recommend that your DBA be on hand while performing the upgrade: to backup the system, assist with the upgrade and then perform whatever modifications might be necessary in the database once the upgrade has completed.

Upgrading without Internet access: If **Priority** is installed on a server that does not have Internet access, see the [Appendix](#) for pertinent upgrade instructions.

Important! Before running the upgrade, make sure that your system meets the minimal hardware, operating system and database requirements for **Priority** 16.

1. Backing Up the System

Before running the upgrade, you must first perform a full backup of your system!

- Run the program **Run Daily Backup** (menu path: **System Management > System Maintenance > Periodic Maintenance**).

2. Upgrading on the Test Server

Important! It is essential to first perform the upgrade on your test server.

1. To copy data from the real server to a separate test server, follow the instructions appearing in the *Switching Servers* document appropriate to your system. You can download this file from the **Priority Documentation** page in the Customer Service Area, under the subject **Installations (Doc.)**.
2. Check a variety of private customizations to make sure they function properly. For example, print some customized documents and reports to make sure they haven't changed. In addition, check some forms that contain customized columns (in both multi-record and full-record views).
3. Once the upgrade is complete, have all users enter **Priority** and perform their routine work. This simulation will test the main system processes, as well as user privileges.

Note! When running the upgrade on the real server, it is recommended that you use the executable file that was downloaded previously and installed on the test server, rather than downloading the file a second time. This file has been saved to the *priority\tmp* directory, using a file name that begins with the characters *16v153*.

3. Running the Upgrade

3.1 Preliminary instructions

1. Make sure that all users have logged out of the system.
2. On the server, close all **Priority** entities and **MS-Office** applications.

3.2 Download/install the upgrade

1. From the physical server, enter **Priority** from the Windows interface, logging in as a user whose email address (defined in the **Personnel File**) is used to enter the Priority Software web site.

Notes:

- This user must be assigned to the privilege group of the superuser (i.e., *tabula* or *Manager*, depending on your database).
 - When installing the upgrade on a server running Windows Server 2008 or higher, enter **Priority** by right-clicking the desktop icon and selecting the **Run as Administrator** option.
2. From the **Help** menu (in the menu bar), select **Upgrade System**.
 3. A checklist will appear. Go through it carefully and ensure that all items have been fully taken care of. Once you confirm the message, the file transfer from Priority Software's Customer Center will commence. This may take several minutes to complete.
 4. Indicate whether you wish to **Upgrade Now** or **Save File** anywhere in the server (so as to run the upgrade later). If you choose the latter option, you will need to double-click the file in the server in order to run the upgrade.
 5. When running the upgrade, wait a few minutes as the upgrade file is extracted. Subsequently, a login window will open with the superuser's name; indicate the proper password.

6. Once the message "Executing the upgrade" appears, the upgrade has begun running, and you no longer need to wait by the computer.

3.3 Completing the upgrade

Before beginning to work in the system, make sure you have received the upgrade completion message, which reads: "Priority upgrade succeeded".

If this message does not appear, or if the screen displays an error message, attach the relevant error report to the service call, and refrain from using **Priority** until you receive instructions from the Priority Software support staff.

3.4 Completing the upgrade for WMS

WMS Users: Upon completing the upgrade, contact the Priority Software support staff for instructions on installing another update.

After installing this update and before you resume working in **Priority**, log in to the system and do the following:

1. Enter the **User Permissions** form (menu path: **System Management > System Maintenance > Users**) and retrieve any users who will be working with WMS.
2. Click the **Licenses** tab and make sure that the **Storekeeper License** column is flagged for these users.
3. Run the **View License Details** report (menu path: **System Management > System Maintenance > Software License >**).
4. In the displayed report, make sure that the **Qty Utilized** does not exceed the **Qty of Licenses** on any of the following lines:
 - **WMS users**
 - **Bins per warehouse**
 - **No. of WMS companies**

Also ensure that there is a sufficient number of interface licenses for the various document types.

Note: If the **Qty of Licenses** on a given line is "0", this indicates an unlimited number of licensed users for the license type in question.

5. If you have exceeded the licensed number of WMS users, return to the **User Permissions** form and clear the check mark from the **Storekeeper License** column for any users who do not need to work with WMS.
6. If you have exceeded the licensed number of WMS companies, enter the **Companies** form (**System Management > System Maintenance > Companies**) and clear the check mark from the **WMS Company** column for any companies in which you do not need to work with WMS.
7. If you have exceeded the licensed number of bins per warehouse or document interfaces, please contact the Priority Software support staff.

4. Upgrading *Priority* Lite and/or *Priority* Rich

4.1 Preliminary Instructions

- If you previously worked in the Silverlight interface (in Version 15): As of Version 16, *Priority*'s web-based interface is HTML5 compliant, and may be run in any web browser; we recommend Chrome.
If you choose to use Internet Explorer, version 9 or higher is required.
- Make sure that .NET Framework 4 (or higher) has been installed on the application server.
- *Priority* Lite users: reinstall the *Priority* Lite package.
- If IIS is installed on the workstation, run the **Update Priority Executables** program from **Start > All Programs > Priority**.

4.2 Installing *Priority* Rich/Lite (application server)

1. Enter *Priority* as the *tabula* superuser and run the **Install Application Server** program (menu path: **System Management > System Maintenance > Internet Definitions > Application Server Maintenance**).
2. In the **Install Options** input screen, choose the relevant option:
 - If you work with the *Priority* Lite package and the Windows interface, select **Priority Lite only**.
 - If you work with the *Priority* Rich interface, select **Priority Lite+Rich**.

Notes:

- After performing the upgrade, users should be instructed to enter the system by means of the **Web Site URL** that is designated when running the **Install Application Server** program. It is recommended that users add this URL to their list of Favorites, instead of the one that was used previously.
- For additional details, see the **Installing the Application Server** document, available in the Customer Service Area on the *Priority* Software web site. This document is also relevant if you did not work with the Silverlight interface but would like to work with the HTML5 interface.

5. Word Templates – Important Notes

As a result of changes made by Microsoft, certain changes had to be made to *Priority* version 16 regarding MS-Word templates.

- In *Priority* version 16, users will no longer be able to edit Word templates created in previous versions of *Priority*. Any user who attempts to open a previously defined template will receive the message "Design of this template is no longer supported".
- Users may define new Word templates using:
 - Word 2013
 - Word 2007/2010 with an add-on. The add-on may be downloaded from <http://xmlmapping.codeplex.com/>.

Please note: This add-on has not been written by Microsoft or Priority Software.

- Word templates created in earlier versions of **Priority** may be used (but not edited) in Office 2010 and below.
- To design or use new Word templates, make sure that .NET Framework 4.0 is installed on the workstation on which **Priority's** Windows interface is installed.
- In **Priority** Rich version 16, Word templates may be sent via e-mail, even if Office is not installed on the workstation from which it is being sent. To display or print the document, Office must be installed.
- In **Priority's** Windows interface, Office must be installed on all workstations that use Word templates.

6. Important Notes

- As of version 12, **Priority** supports documents in HTML format only. Customers with customizations involving documents in the old format are requested to switch to HTML format to prevent problems in producing the reports. Printouts in the old format will no longer be covered by service contracts.
- If users connect to **Priority** via a terminal server, you must restart the terminal server after upgrading the system, log in as an administrator and enter **Priority**.
- Users of the E-Documents module should run the **Set Up PDF Document Signature** program (menu path: **Office Management > Mail**). After running the program, you will no longer be asked to enter your password each time an e-document is sent, and a copy will be saved as an attachment to the original for easy retrieval (i.e., you will no longer need to perform a synchronization in order to save a copy of the sent document).
- In version 16, **Priority** has done away with the concept of a human resources company, and employee details may be viewed and revised from any company. As such, customizations involving the Personnel File may require adjustment. The upgrade program checks for customizations to the Personnel File and its sub-level forms. If adjustments are required, you will receive a message in the error report that appears at the conclusion of the upgrade.

Appendix: Upgrading without Internet Access on the Application Server

Download License File

1. On a workstation with Internet access, enter the Customer Service Area on the Priority Software web site and click **Download License File**.
2. In the page that opens, log in using the e-mail address and password of a contact that is authorized to enter the Priority Software web site.
3. In the next page that opens, right-click the download link and save the license file to the server.
4. From the server, double-click the saved license in order to execute the file.
5. Once the file finishes running, a report appears. Check the last line of this report to ensure that your license to run upgrades is currently valid.

Install the License File

1. To obtain an upgrade file, contact the Priority Software support staff.
2. Before installing the upgrade, take the preliminary steps outlined in sections **1** (backing up the system), **2** (upgrading on the test server) and **3.1** (preliminary instructions) of this document.
3. To install the upgrade, log into the server and double-click the file in order to run the upgrade.
4. When the upgrade finishes running, make sure you have received the upgrade completion message, which reads: "Priority upgrade succeeded". If this message does not appear, or if the screen displays an error message, attach the relevant error report to the service call, and refrain from using **Priority** until you receive instructions from the Priority Software support staff.
5. Continue with the instructions appearing in this document, starting with section 4.