Switching Computers with V7

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Requirements

Transferring Version 7 Polling data from one computer to a new computer is a simple process that only requires a little preparation to make the procedure go smoothly. Before beginning the transfer, users should have the following on-hand:

- A licensed copy of Version 7 Archive Agent V.3 installed on the old computer.
- A licensed copy of Version 7 Polling installed on the old computer.
- A copy of the Archive Agent V.3 install, which can be on CD, downloaded from the web, or obtained from a cash register dealer.
- A copy of the Version 7 Polling install, which can be on CD, downloaded from the web, or obtained from a cash register dealer.
- A means to transfer data from one computer to another i.e. a CD\DVD burner, pen drive, external hard drive, through networking the computers, or web software will be needed. Email can also be used to transfer the files. Both PCs must be able to access email accounts. For more instructions on how to create an email with Archive Agent, please consult the Archive Agent help files.

Please read all the directions and FAQs below before beginning the transfer. Archive Agent is NOT required to switch PCs; however, it does make the transfer process significantly easier. Instructions are contained in the FAQ section for transferring data without Archive Agent.
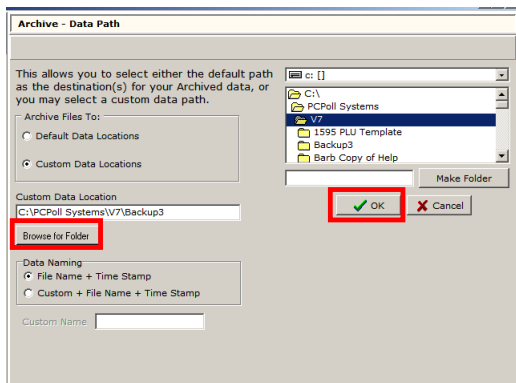
Transferring with Archive Agent

1. Archive the data on the old computer.

   A. Open the Archive Agent program from the Program menu.
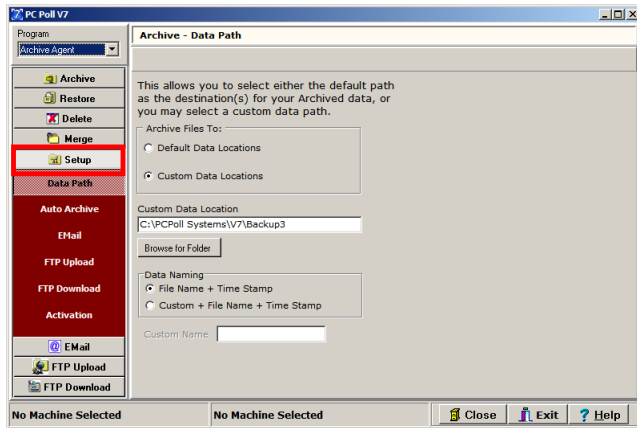
B. Select **Setup** from the left menu then **Data Path.**
C. In the **Archive Files To** section, select **Custom Data Locations**.

D. Enter the data location in the **Custom Data Location** data entry box or browse for your transfer media i.e. CD drive, pen drive, external hard drive or network location with the **Browse for Folder**.
E. In the **Data Naming** section of the screen, use the default **Data Naming** option of **File Name + Time Stamp** or use the **Custom + File Name + Time Stamp** option to add a custom name for the file.
F. After selecting a destination, click **OK** on the **Select Directory** window.
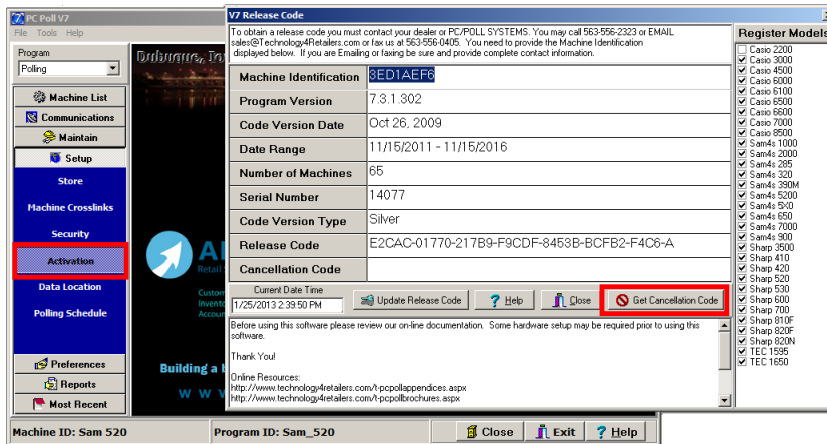G. Verify your path on the **Destination Path Options** window and click **OK.**
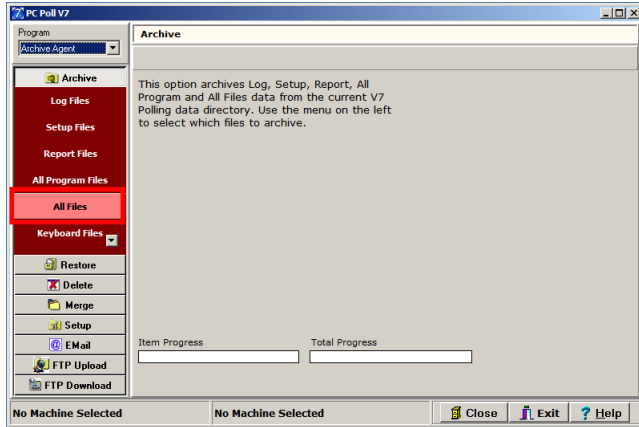
H. On the left side of the screen, select the **Archive** tab.
I. Click on the **All Files** option.
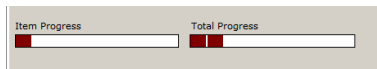
J. The software will create an archive of all Version 7 Polling files to the previously selected **Destination Path**. The Item Progress and Total Progress bars at the bottom of the screen will flash. *Note: Please allow the software to finish the process. Do not interrupt the process by closing the software.*
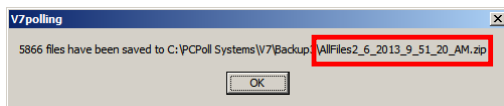
K. When the software has completed the archive, a message will be displayed with the number of files archived and the full file name, including the path. Write down the file name. An example of a name is: AllFiles 2_6_2013 9_51_20_AM.zip. *Note: The file names include a date/time stamp of when they are created.*
L. Click **OK** and close Archive Agent.

2. Install Version 7 Polling on the new computer.
3. Return to the old computer, open V7 Polling, and click on the **Preferences** option. Write down all selected preferences. These options are stored separately on each computer. These options should be re-entered onto the new system.

4. Call or email Tri-Technical Systems 563-556-3556 or sales@technology4retailers.com with the Version 7 Polling Cancellation Code from the old computer. *Warning, this will disable the software on this computer!*
    A. To obtain a Cancellation Code, open V7 Polling on the old PC.
    B. Click on **Setup** on the left menu.
    C. Next, click on **Activation**.
    D. Single-click on the **Get Cancellation Code** button.
    E. Warning message screens will appear, click the **YES** buttons.
    F. Write down the Cancellation Code. It is recommended either to have Tri-Technical Systems on the phone when you are obtaining the code, or to email a print screen of the information to sales@technology4retailers.com.
    G. Click the **OK** button.
    H. Close Version 7 Polling. The software is now disabled on the old computer and cannot be used. See FAQ #5 & 6 for more information.

5. After Tri-Technical Systems has verified the Cancellation Code, new Release Codes will be issued for V7 Polling and V7 Archive Agent. The **Machine Identification** numbers must be provided from the V7 Polling and Archive Agent Release Code screens on the new PC. Enter the new codes into the Release Code entry boxes and click the appropriate update buttons.
6. Open Archive Agent on the new PC.

7. On the left side of the screen, click the **Restore** button.

8. Click on **All Files**.
9. Archive Agent will display a prompt about deleting the current data. Click **YES.**
10. Use the **Open** dialog box to browse your PC to find the archived data that was created in **Step 1I**.
    Note: If the data was archived to a CD, pen drive or external hard drive, those media devices should be connected before browsing.
11. After finding and selecting the archive, click the **Open** button. The name of the archive should match the name written down in **Step 1K**.
12. The software will extract the archived data to the new PC's data folder. Archive Agent is able to automatically detect this location. When the process is complete, Archive Agent will display a message detailing the number of files that were extracted and their destination location.
13. Close Archive Agent.
14. Version 7 Polling is almost ready for use on the new computer.
15. Users will need to <u>verify</u> that all the data has transferred correctly. It is particularly important to verify machine, script, schedule, and calendar setup if automatic polling is being used. The V7 calendar and exporting options will need to be manually reset. These preferences are stored on each computer.

> **Resetting Preferences**
> A. Open V7 Polling.
> B. Select the **Preferences** button on the left menu.
> C. Make the necessary changes on each tab.
> D. Click **Close** at the bottom of the screen to save your edits.
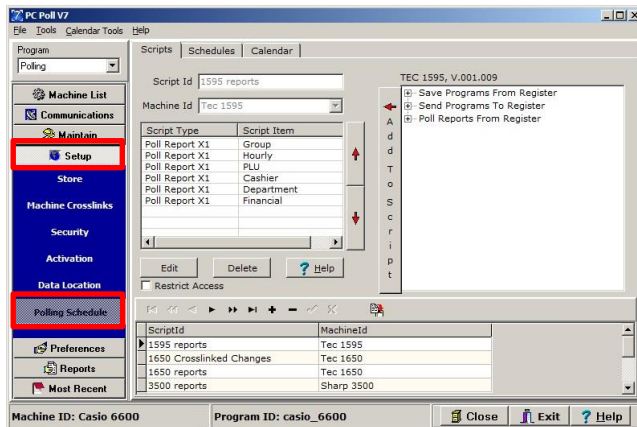
> **Verifying Scripts, Schedules, and that the Calendar is on**
> A. Go to **Setup** on the main menu on the left then select (if the Calendar was used on the old PC) **Polling Schedule**.
> B. On the **Scripts** and **Schedules** tabs, check that there are scripts and schedules present.
> C. Review the settings. If auto exporting was used on the old PC, make sure to verify and reset all of those export options. (Highlight the script items and click the **Edit** button.)
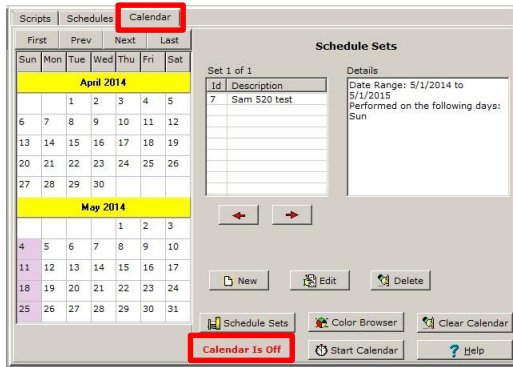
D. Go to the **Calendar** tab. If **Calendar is Off** is showing at the bottom of the screen, click the **Start Calendar** button just to the right, to turn the calendar on.

E. The calendar is now on. See above right.

Users should also edit each machine and re-select the **Comm Port**. Different computers have different ports or modems.

Verifying Machine Comm. Ports

A. Open V7 Polling.

B. Select the **Machine List** button from the left menu.

C. Click on the machine to edit it from under **Machine List**.
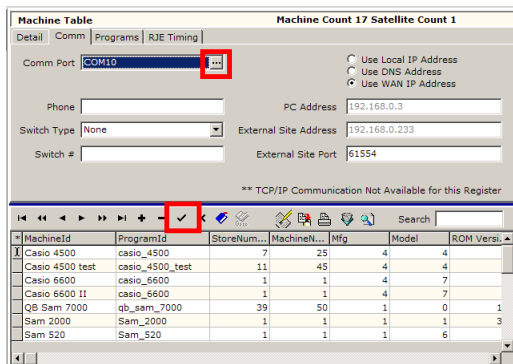
D. On the **Comm** tab, click on the three-dot button in the **Comm Port** box to bring up a list of available ports. Make any changes. Click on the Post changes of current record ☑ button to post the change.

E. Click **Close** and return to the Machine Maintenance screen by clicking **Machine List**.

F. Repeat for all machines.

G. After this has been completed, it is recommended that users test the communications for each machine by saving a small program back to the PC. Repeat for all Machines.

Validate Tables
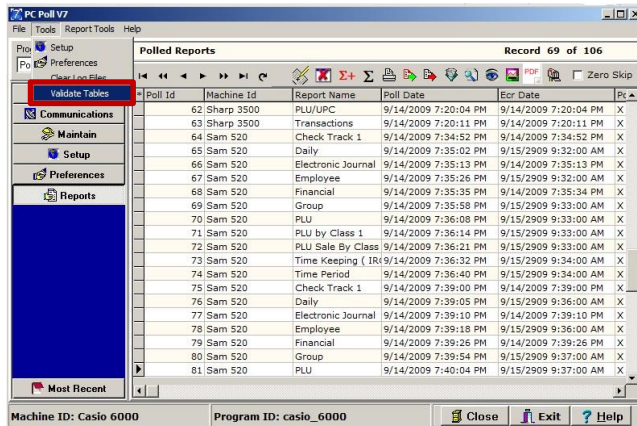
16. The **Validate Tables** menu item validates the Report Tables, Program Tables, and Support Tables and can delete the Index File if this option is checked. Click on the **Validate Tables** menu item, from the **Top Menu**, to open the Validate Tables screen below left.
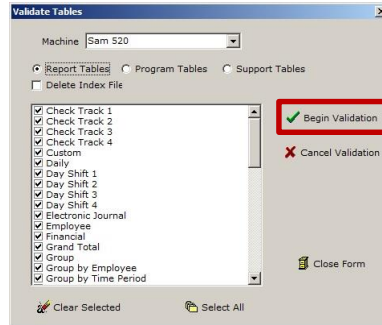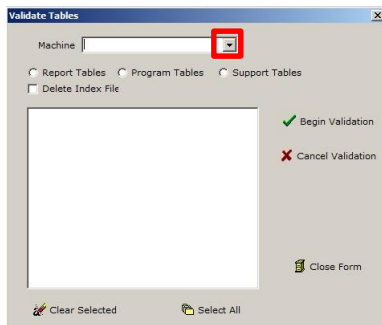

A. Choose the **Machine** from the drop down menu at the top. See above left.
B. Choose **Report Tables** to validate.
C. Select **Delete Index File**.
D. All the appropriate tables will appear in the center. Use the **Select All** button, at the bottom of the screen, to check off all listed items.

17. When all items are checked, click on the **Begin Validation** button to start the table validation process.
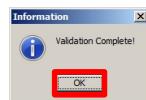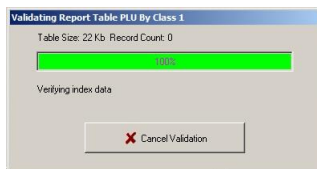
18. The Progress screen on the left above will open.
19. When the validation process is successfully completed, the screen above right will appear. Click **OK** to proceed.

20. This process should be repeated with the Program Tables and the Support Tables. Repeat Report Validation for all machines.
21. To cancel the process, click on the **Cancel Validation** button. *Note: The software will first finish the current table before cancelling the validation. Large report tables will take a long time to validate and to cancel. It is **highly recommended** that the software be allowed to finish.*
22. Click the **Close Form** button in the lower right to exit the validation screen.
23. Now the software is ready for use.

Email Option
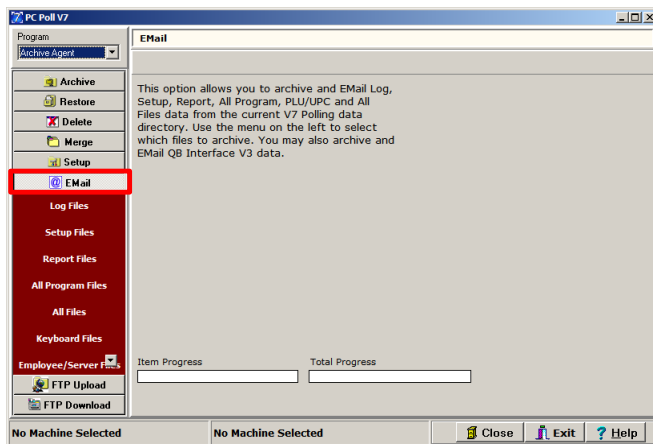
Note: This method is only recommended for small file transfers.

1. To use Archive Agent's emailing options, omit **Steps 1B – 1G**. Instead of clicking the **Archive** button on the left menu, in **Step 1H**, select the **E-mail** button.
2. After installing the software on the new computer in **Step 2**, be sure to open the email sent by Archive Agent, and save the attachment to the new computer.
3. When browsing for the files, in **Step 10**, simply find the saved attachment. For more information on configuring Archive Agent's email settings, please consult the help files.

Frequently Asked Questions

1. **I do not have V7 Archive Agent. Do I need Archive Agent to transfer my files?**

   ► No, but the transfer process becomes more difficult. You will need to manually locate and copy all data files and subfolders between the new computer and the old. To find your current data location, on the old computer: Open your V7 Polling software, click on the **Setup** then **Data Location**. The Data Path screen above will display all necessary data files and subfolders. Copy all the files. On the new computer, follow the steps above to find the current data location and paste all the copied files into that location. *Note: Be sure that V7 Polling is closed before files are copied or pasted.* You may also need to check the file attributes after the paste. Transferring over CD can change the file attributes to Read Only. See the end of this document for more detailed instructions.

2. **Do I need to run the install routine on the new PC or can I just copy and paste my executable?**

   ► The install routine must be run on the new computer to be sure all supplementary programs are installed properly on the new system.

3. **What do I do if I do not have a new install disk?**

   ► An installation disk can be obtained from your cash register dealer or downloaded from our website www.technology4retailers.com . *Please note: If you are downloading the latest version of the software, update fees may apply if the download on the website is significantly newer than the originally purchased software package.*

4. **What do I do if I do not want to transfer the data from my old computer? I want to start clean on the new PC.**

   ► That is fine. The software will work on the new PC, however, all information must be re-entered including machine and store setup.

5. **What if I forgot to get a Cancellation Code and my old computer is gone?**

   ► Your dealer will need to be onsite and install the software on the new PC. If your dealer is unavailable, relicensing fees may apply. *Also note: If the old PC is gone and the data has not been saved, all the old data will be lost.*

6. **My computer crashed and I cannot get a Cancellation Code. What do I do?**

    ▶ Your dealer will need to be onsite and install the software on the new PC. If your dealer is unavailable, re-licensing fees may apply. *Note: If the V7 Polling data was never backed up from the old PC, the data is lost.*

    ▶ Tri-Tech recommends using Archive Agent on a regular basis to create backups for recovery purposes.

7. **I cannot get the install to run properly on my new PC. What could be wrong?**

    ▶ All programs must be closed and the person logged on must have administrative rights to run the install. If problems continue, reboot the PC and be sure to log on with a profile that has administrative rights.

    ▶ If you are receiving an error pertaining to a missing loader file, please re-download the installation. Your internet connection has improperly closed before the entire file was downloaded.

8. **What if I want to keep the same version or build number I am using on my old PC, but I do not have an installation disk?**

    ▶ It is recommended to keep a copy of your installation disk when the software is installed. If one cannot be located, you may attempt to transfer the executable from the old PC to the new. *Please note: There may be incompatibility issues and you may need to update to the current version of the software.* To copy the old executable you should first install the new copy of the software on the new computer. Before obtaining a release code from Tri-Tech, as in **Step 5**, you should copy the old executable from the old computer and paste it onto the new PC. The default location for the executable is C:\PCPOLL SYSTEMS\V7. If a custom path was used either on the old or new PC, you will need to manually locate the desired file. The executable file name is V7polling.exe. *Note: If advanced help is needed from Tri-Tech support fees will apply.*

14. **What do I do if I want to run the software on both my old computer and new computer?**

    ▶ To run the software on both computers a second computer license should be purchased from your cash register dealer. Contact your dealer for pricing. Once the software has been disabled (cancellation code) it cannot be used even to view previously taken register reports.

15. **Can I use Archive Agent to transfer data from my other PC/POLL programs to my new PC?**

    ▶ Yes. V7 Archive Agent can archive and restore data from all Version 7 software programs. Simply follow the steps on the previous pages, making sure to archive and restore data from the appropriate programs.

16. **Is Archive Agent only for transferring data between PCs?**

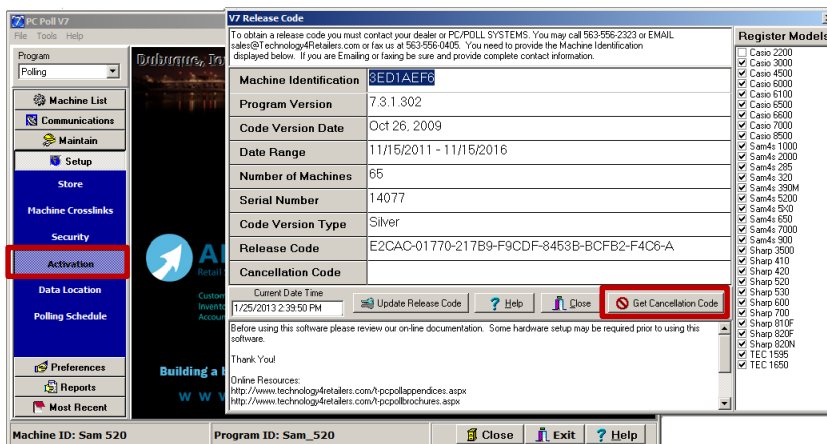   ▶ No. V7 Archive Agent is a complete file management tool. See features listed below.

V7 Archive Agent Features

≈ Archive data from V7 Polling, the QuickBooks Interface, and custom locations
≈ Use Archive Agent to automatically run backups
≈ Backup data to external devices such as CD or a network location
≈ Use Archive Agent to transfer data from one computer to another
≈ Restore archived data with just a few simple clicks
≈ Use the delete option to prune data for faster database access and easier viewing
≈ View previously created archives
≈ Merge report data for recovery
≈ Corporate Polling—merge in data from various locations at a corporate office

Transferring Without Archive Agent

Version 7 Polling data can be transferred manually from one PC to another. It is **highly recommended** that customers use Archive Agent to transfer the files; however, it is not required.

1. Open V7 Polling and click on the **Preference** button on the left menu. Write down all selected preferences. These options are stored separately on each computer. These options should be re-entered onto the new system.
2. On the old PC close V7 Polling.
3. If the V7 Polling software was installed in the default location, open a Windows Explorer® window by right clicking the **Start** button in the System Tray. On the menu that opens, select **Open Windows Explorer**.
4. Type the default location into the top search bar or browse to C:\PCPOLL SYSTEMS. Copy everything on the right side of the screen to a CD\DVD disk, pen drive, external hard drive, through networking the computers, or web software.
5. Install the software on the new PC.
6. Paste the files copied in **Step 4** onto the new PC.

7. Call or email Tri-Technical Systems 563-556-3556 or sales@technology4retailers.com with the Version 7 Polling Cancellation Code from the old computer*. Warning, this will disable the software on this computer!*

A. To obtain a Cancellation Code, open V7 Polling on the old PC.
B. Click on **Setup** on the left menu.
C. Next, click on **Activation**.
D. Single-click on the **Get Cancellation Code** button.
E. Warning message screens will appear, click the **YES** buttons.
F. Write down the Cancellation Code. It is recommended either to have Tri-Technical Systems on the phone when you are obtaining the code, or to email a print screen of the information to sales@technology4retailers.com.
G. Click the **OK** button.
H. Close Version 7 Polling. The software is now disabled on the old computer and cannot be used. See FAQ #5 & 6 for more information.

8. After Tri-Technical Systems has verified the Cancellation Code, new Release Codes will be issued for V7 Polling and V7 Archive Agent. The **Machine Identification** numbers must be provided from the V7 Polling and Archive Agent Release Code screens on the new PC. Enter the new codes into the Release Code entry boxes and click the appropriate update buttons.

9. Continue from **Step 14**.