Upgrading to our AS/400 V4 Software Products   rev D 1/31/12

General Information:

These instructions should be printed for use during the upgrade.   They are intended to apply **only** to upgrading our AS/400 products. Please see our website or call to discuss all upgrades for all other products.

These instructions are not intended for creating new AS/400 installations. However, they can be used for this purpose provided appropriate logical adjustments are made. The necessary adjustments are not documented herein, thus caution is advised.

If you participate in our Annual Support Plan and live in a time zone where it is practical:

> These instructions are not particularly complex or risky. Nonetheless, they are long because of the many possibilities involved and there is **always** some risk. We can save you a great deal of time and help reduce that risk. Be safe, not sorry. With our help, an upgrade only takes 15-30 minutes. Call us if possible to discuss the overall process and to schedule a time for assisting you with it, especially for steps 5 and higher of the final AS/400 host component upgrade below.

These instructions apply to these upgrade cases:

- Optional upgrades for an existing machine that is not being changed (ie, you simply need our latest version)

- Upgrades required when the machine changes (ie, new machine uses OS/400 V6 or above and non-observable *PGM objects are present on the old machine)

- Upgrades required when the machine does not change (ie, OS/400 is upgraded to latest version and non-observable *PGM objects are present on the old machine)

- Upgrading the client only (seldom required).

These instructions apply when upgrades are made from our v1, v2, or v3 products to our v4 products. Note: We have not tested upgrading from all pre-2000 versions. This process **should** work, but caution is advised.

There are **no** changes required in user applications, regardless of the version being upgraded. Known issues not requiring application changes are documented in the Support area of our website. See "Other Known Issues".

An upgrade is **required** when moving to OS/400 V6 and above and **any** *PGM objects in the product library are not fully observable. You can check them with DSPPGM or with the IBM upgrade utility. The latter is always recommended because numerous developers have provided non-observable code in the past; the IBM utility will find them all in one easy step.

These are the libraries to check:

```
FORMagic/400  -  FMAGIC     (also used for FORMagic/400 PDF)
FontMagic/400  -  FONTMAGIC
ProSign/400     - PROSIGN
ShopCom/400   - STOP!  Special instructions are required, please call.
```

All versions of our products are compatible with OS/400 V6 and above unless observability is an issue. In a few cases, observable distributions were provided. They can still be used! Note: There are some minor restrictions in old versions of ProSign/400 due to API changes made by IBM in OS/400 V5.

When an upgrade is required for our products, we recommend doing it:

- On the **old** machine well before migration to the new machine occurs. In this case, you simply SAVLIB/RSTLIB and install new keys when migration occurs to the new machine.

- Or, well before any new OS version is installed. In this case, **nothing** else has to be done later when the new OS is installed.

There are generally no charges for upgrades to customers covered by an Annual Support Plan. There will be charges in these cases:

- The AS/400 serial number changes and the old machine is not completely removed from the company (ie, sold to a third party, returned to lessor, or scrapped). If retained anywhere within the corporate structure (including parent, child, and sibling companies), charges will apply.

- The AS/400 serial number changes and the new machine has a higher Processor Group than the old machine. The price difference will apply.

- Installation is made into a new partition.

New Activation Keys are required when:

- The OS/400 Processor Group increases.
- The AS/400 serial number changes.
- You are installing a new major version of our software.
- Installation occurs into a new or changed partition number.

If you are in a time zone which precludes our help, be very methodical and careful. If you don't understand something, suspend the process, and contact us by phone or email.

Getting the New Version:

V4 for all of our products, except ShopCom/400, is contained in a single download file available at this link:

    www.keoform.com/kpsv4.exe

Download the file and save it in a permanent location, for later use if needed. It is your permanent copy; we do not distribute on tangible media!

This single file is about 10MB. It is heavily compressed to contain the latest versions of all of our products (AS/400 and non-AS/400) and all of the User and Installation Guides (again, except ShopCom/400).

Installing on the PC and you already have v4 installed on this PC:

We strongly recommend backing up the installation folder; the default is c:\fm400w40.

Execute the download file. When you reach the "Select Installation Type" screen (about the 4th), be **sure** to select "Upgrade Existing v4 Installation".

This is all you have to do on the client; your existing keys will work with all sub-versions of v4.

Installing on the PC and you do NOT have v4 installed on this PC:

Please note: You are allowed to install only one copy of the client unless you have purchased additional copies or an unlimited site copy. The installation limit is shown in your key file.

Execute the download file. When you reach the "Select Installation Type" screen (about the 4th), be **<u>sure</u>** to select "New Installation".

Input the client keys via Tools, Register. Use the latest v4 key file we have provided to you (for this upgrade or previously).

If you are upgrading from v3 on the same or another PC, you can migrate forms information from the original folder. It **must** be a v3 client. You must copy, or have network access to, the v3 client folder. Use Tools, Migration and specify the correct folder. You should also set your preferences in Tools, Preferences.

Completing the Client:

Do a few tests to insure everything works properly.

If no issues arise after several weeks or months of usage, you can delete the original product installation folder(s) and related Desktop and Start Menu shortcuts. Prior versions used default folder names such as c:\fm400, c:\fm400d, c:\fm400w, and c:\fm400w32 for FORMagic/400. FontMagic/400 used the same names with "FF" substituted for "FM".

The remainder of these instructions apply only to upgrading the AS/400 host components. The v4 client is fully compatible with all v1-v3 host components except you will not be able to:

- Use Automated FTP uploads for forms and fonts **(will work with <u>some</u> v2-v3 versions)**.

- Upload ProSign/400 message screens generated in the PC client (coming in a future release).

Because of this compatibility, you do **not** have to immediately upgrade the host components to v4. Note: There is actually complete inter-changeability between all v2-v4 clients and all v2-v4 hosts.

Upgrading the AS/400 Host Product Components

These instructions assume you have FTP configured and operational on your AS/400 and have the necessary authority for using it. If not, you can use these instructions as a guide and refer to the Installation Manual to use the Mapped Network Drive method for installing the "Host Installer Application (HIA)". Follow these steps to complete the host component upgrade(s):

1. The HIA will be placed in a library named PCI400W. It contains **all** of our products; only one installation of the HIA is required regardless of the products being upgraded.

    Please insure this library does not exist, or is left over from a prior installation of one of our products. We have **never** seen anyone else use a library with this name. It will be created automatically if it does not exist.

    Use the PC client to install the HIA using the Automated FTP method. Select Installation, Install to AS/400, Use Automated FTP. Input the AS/400 system name or TCP/IP address, User ID, and Password. The first two entries will be saved for use during subsequent upgrades and uploads. **Note: If, for some reason, Automated FTP cannot be used, see c:\fm400w40\kiftp.txt for a semi-automated alternative.**

Unless an error occurs, the HIA will be completely installed. Progress messages will be displayed. Few, if any, will require a response.

If an error occurs, use the FTP and Host logs from the Tools menu to diagnose it. You can retry this step as many times as needed because **no** user data is located in PCI400W. It is completely rebuilt during each execution.

2. The preparatory steps above consume most of the time used for the upgrade. The steps below complete the **actual** upgrade and can be deferred to off hours if necessary. Perform them separately for each product being upgraded. You can upgrade products at different times if desired.

3. At this point, we **strongly** recommend that you save the library for the product being upgraded, especially if you are completing the upgrade without our help. Problems seldom occur, but better safe than sorry:

    FORMagic/400 - FMAGIC   (also used for FORMagic/400 PDF)
    FontMagic/400 - FONTMAGIC
    ProSign/400   - PROSIGN

4. If you have scheduled a time for our assistance with the upgrade, call as scheduled to complete the steps below. Please complete step 3 for **all** products to be upgraded before calling.

5. Insure the product library is **not** in your library list. Use EDTLIBL and remove it if present. It **is okay** for the product library to be in the library list of **other** jobs as long as the product is **not** being used in applications.

6. Insure that **no one** will be using the product while the upgrade is in progress. Depending on AS/400 speed, only 1 to 5 minutes will be required unless an issue arises (they are very rare).

7. ADDLIBLE PCI400W, then run command KIGOPR.

8. Perform the actual upgrade. Enter the Option number for the product being upgraded, the word "Update", and the word "Update" again. Once the upgrade begins, **no confirmation messages will occur**. If you are sure, press F6 to perform the upgrade. When it completes, you will receive a notice of successful completion. If you press any key other than F6, your input will be erased. Note that Option 1 upgrades both FORMagic/400 and FORMagic/400 PDF at the same time.

    If **any** errors occur, place the cursor on the message line, and press Help to see the full text. You can also use F8 to view the Joblog.

    If you participate in our Annual Support Plan, are performing the upgrade during normal Mon-Fri business hours (Eastern time), and cannot determine how to proceed, call us immediately for help.

9. Input Activation Keys for the new version. Use EDTLIBL to add the proper library to the library list. Use the proper command to start the application, choose the option for Activation Keys, and input the keys. Use the latest v4 key file we have provided to you (for this upgrade or previously). These commands will start the product menus:

    FORMagic/400 - FMGOPR   (also used for FORMagic/400 PDF)
    FontMagic/400 - FFGOPR
    ProSign/400   - PSGOPR

10. Test all upgraded products quickly so they can be released for production usage. Only rudimentary testing is needed. We suggest:

    FORMagic/400 - Use Work With Overlays, do an option 5 form test.
    FontMagic/400 - Use Work With Fonts, do an option 5 font test.
    ProSign/400   - Use the options to insure your Message Images are still present.

11. An upgrade for ProSign/400 is now complete.

12. Insure these folders are present. If not, use WRKFLR to create them in the root level for each product, as needed. Use option 14 to assign Public Authority AUT(*ALL). These folders are required even if Mapped Network Drive will not be used.

    FORMagic/400 - FMAGIC
    FontMagic/400 - FONMAGIC

You can also use these commands instead:

    CRTFLR FLR(xxx) AUT(*ALL)   [create the folder]
    EDTDLOAUT FLR(xxx)   [set AUT(*ALL)]

13. Skip to Step 16 if you will be using the Mapped Network Drive method for uploads. If you will be using Automated FTP (highly recommended if it worked for the host upgrade) or the Other method for uploads, continue with Step 14.

14. To enable Automated FTP form and/or font uploads, or uploads via the Other method, change Data Areas as follows:

    FORMagic/400 - CHGDTAARA DTAARA(FMAGIC/FMAMTXT (101 2)) VALUE('FT')
    FontMagic/400 - CHGDTAARA DTAARA(FONTMAGIC/FFAMTXT (100 2)) VALUE('FT')

Note the similarities and **differences** in these commands. Be careful to execute them correctly. You can copy and paste.

If you need to revert back to using Mapped Network Drives, re-issue the same commands with a value of two spaces (' ').

More information is provided in section 2.4 of the Installation Guide. It is accessible from the Administrator, Installation menu, Installation Guide.

If you have purchased multiple client copies, **all** PCs must do the upload using the **same** upload method (ie, all 'FT' or all ' ').

An upgrade for FontMagic/400 is now complete.

15. Upload a test form (only if you plan to use Automated FTP):

Test a form upload using Automated FTP. Create a dummy form and upload it. To expedite initial evaluation and application testing, pre-designed forms SAMP600.PRN (for use with FORMagic/400) and PGRNBAR.PDF (for use with FORMagic/400 PDF) are provided in the v4 installation folder. Use either to create a form in the client and then use Automated FTP to upload it. If successful, delete the form in both the PC client and 400.

16. Cleanup old objects that may have been left from a prior version (not applicable to FontMagic/400):

See our website www.keoform.com/errors.htm, FMAGIC Library Cleanup, V4 at the bottom. This cleanup is **essential** if you will be using command FMGMRG01 (FORMagic/400 or FMGPDF01 (FORMagic/400 PDF) for testing, evaluation, or in existing applications.

17. All product upgrades are now complete.