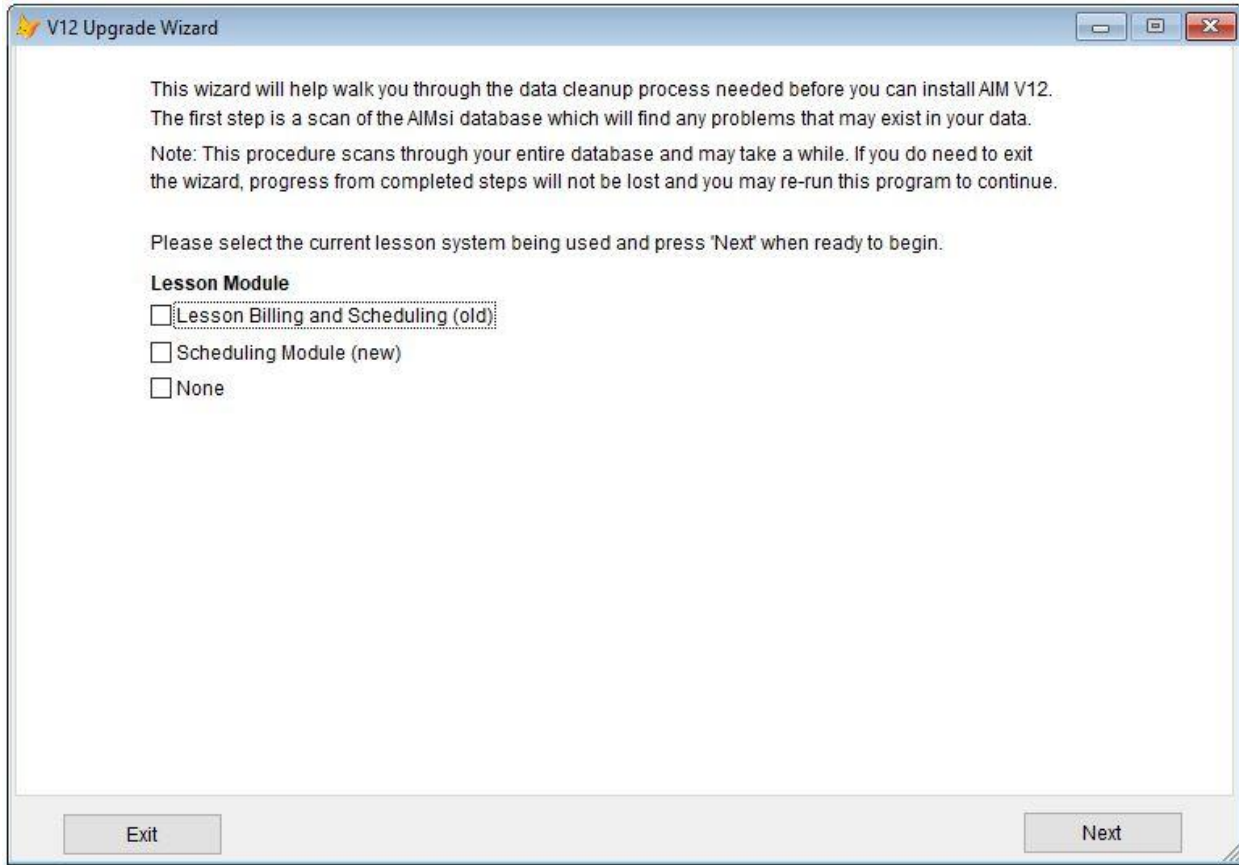


Below is the first page of the upgrade utility, here you simply need to choose which lesson module you currently use in version 11, this will determine which (if any) lesson system is converted into the v12 scheduling module. If the module is not being used, choose none. Before clicking next please note that the entire database will be scanned and it may take time to complete. When ready press next.



Summary Page

Once the database scan has finished you will see the following summary page. In the grid 13 types of data are listed, all of these areas were checked for potential problems. The 'Records' column shows how many problem records were found.

The 'Option' column contains both a 'View' and a 'Skip' option. This is used to choose whether you want to work on those areas or not. Only rows with problem data will be set to 'View' by default. If you do choose to skip sections, you can simply re-run this utility later to work on those.

Each row is color coded to indicate whether any problem records were found and whether that data must be corrected before conversion.

Green rows indicate that no problems were found, these will be skipped automatically.

Red rows indicate that problems were found, and that this data must be corrected before conversion. The v12 conversion program will not allow conversion if these problem types are not resolved.

White rows with no highlighting indicate that problems were found, however, if those are skipped the conversion program will still allow you to convert. These areas should still be corrected because it could prevent the affected records from being moved into your v12 database.

Once you have chosen the desired options for each problem type press **Next** to proceed.

Note: Even if no problems are found (all green rows), it is important to press Next so that a general database cleanup routine can be run which corrects certain known data issues which can interrupt the conversion process. Once the cleanup program is complete the wizard will finish.

Below is a summary of the areas being checked for data problems. To make corrections select "View" in the option column. To skip a section select "Skip". You may re-run this program to view and correct skipped section later. If a section is skipped that data will not be converted.

Step	Problem Type	Records	Option
1	Orphaned Subcategories	6	View
2	Orphaned Categories	2	View
3	Orphaned Employee References	0	Skip
4	Orphaned Chart of Account References	4	View
5	Orphaned Store Location References	1	View
6	Orphaned Tax Authority References	1	View
7	Orphaned Workstation References	0	Skip
8	Orphaned Customers	6	View
9	Orphaned Manufacturer/Publisher References	4	View
10	Orphaned Vendor References	1	View
11	Contracts with Invalid Contract Default Selected	0	Skip
12	Orphaned Selection Code References	0	Skip
13	Duplicate Purchase Orders	0	Skip

Red indicates a required row for v12 conversion
Green rows indicate no problems found in this data
White rows indicate problems that should be corrected, but are not required for conversion

Exit Next

Next, each of the individual problem types will be covered; you may refer to these pages if you have problem records in any of these areas.

Note: If you choose to exit while using this program at any point, any work that has already been completed on previous steps will not be lost. When running the program again you will be able to continue where you left off.

View Details Button

Each page also includes a **View Detail** button. You may select a record and press this button which will show you the actual database records which reference the missing value in the selected row. This can be helpful when determining what to change them to.

You will first see a list of affected tables, choose one of the tables and press **View** to see the data. The data will be shown in a grid. Please note, this grid is not editable and is simply for reference. Close the grid window when finished viewing to return to the table list.

In the example below, I have selected a missing manufacturer, Yamaha and pressed view detail. Next I selected the “scsadsc” table which is an inventory table and pressed view, this now displays the actual inventory records that Yamaha is linked to. It may also be helpful to download the **DataDictionary.xls** file from the [Member Portal](#) website which explains what each database table and field is for.

The left screenshot shows a 'Details' dialog box with the following content:

The missing value was found in the below tables. Choose a table to view the related records.

Table Name
scsadsc

Buttons: Cancel, View

The right screenshot shows the 'Orphaned Manufacturers' window with the following content:

The next step is cleaning up and fixing missing manufacturers.

The following Mfgs can't be found:

Mfg	Replacement Mfg
Yamaha	

Buttons: Proceed, View Detail

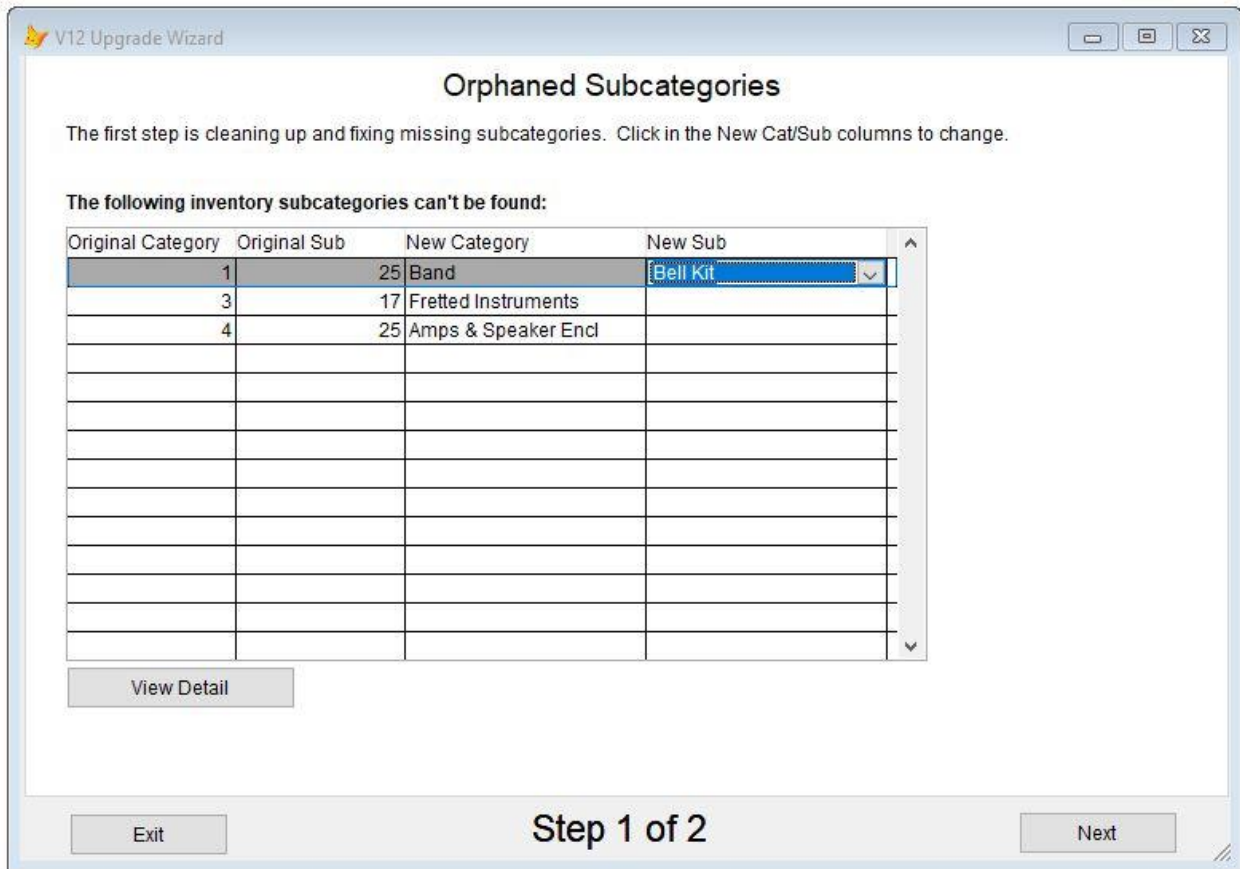
Step 1 of 1

Orphaned Subcategories

Below is the orphaned subcategory page which lists any subcategories that are referenced in supporting data such as inventory records or sales history, but were not found in the current subcategory lists. This could include both inventory and non-inventory subcategories.

To correct an entry click in the “New Sub” column and choose what you would like to change those references to. You may also change the category as well in the “New Category” column if you need to

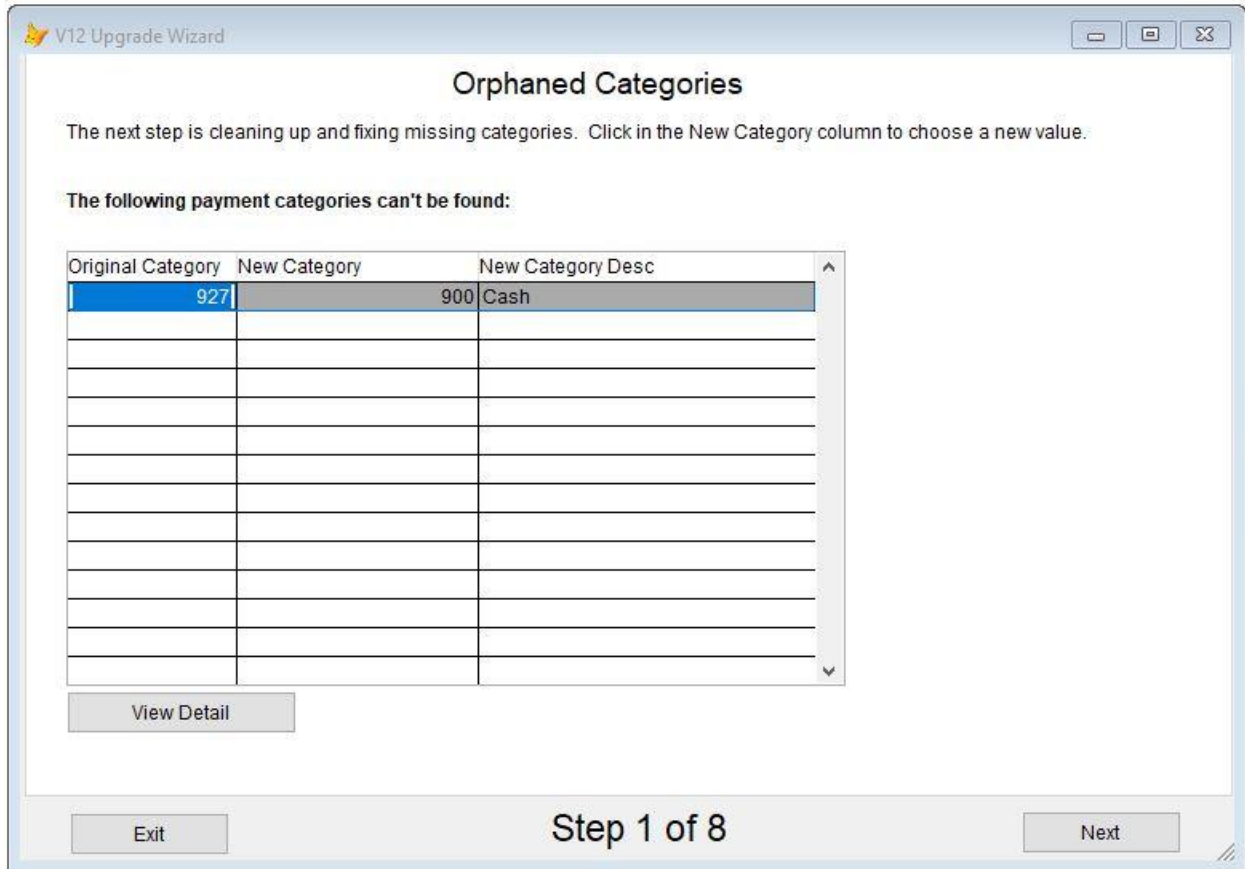
move it somewhere else entirely. When finished press **Next**.



Orphaned Categories

Below is the orphaned category page, this is similar to the subcategories page and lists any categories that are referenced in supporting tables, but were not found in the category lists. This could include both inventory and non-inventory categories, as well as payment and return categories. In the example below a payment category is missing and I have linked it to Cash.

To correct an entry click in the “New Category” column and choose what you would like to change those references to. When finished press **Next**.

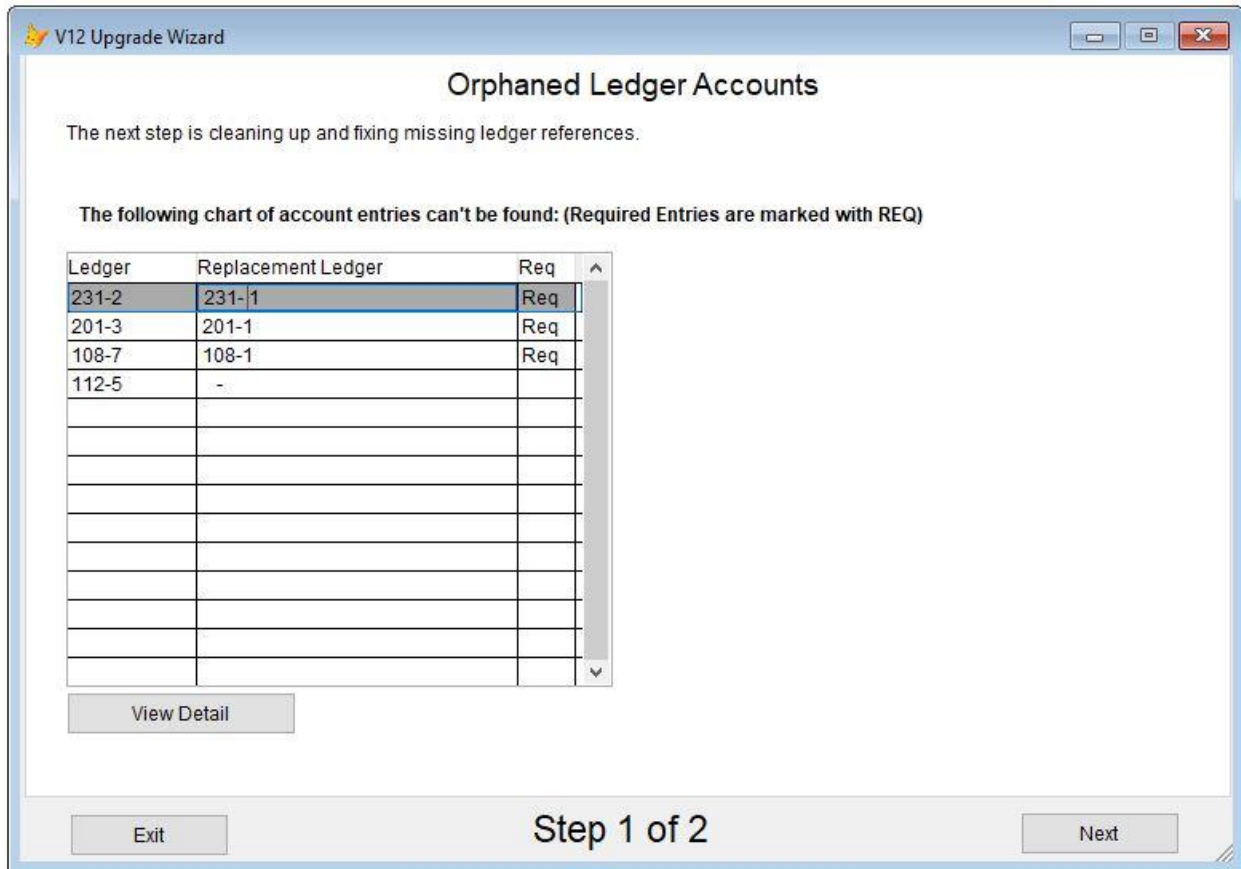


Orphaned Employees

Below is the orphaned employees page, this page lists any employee references that were found in supporting tables but no longer exist in the current employee list. Choose a new employee by clicking in the "Replacement LAN ID" column.

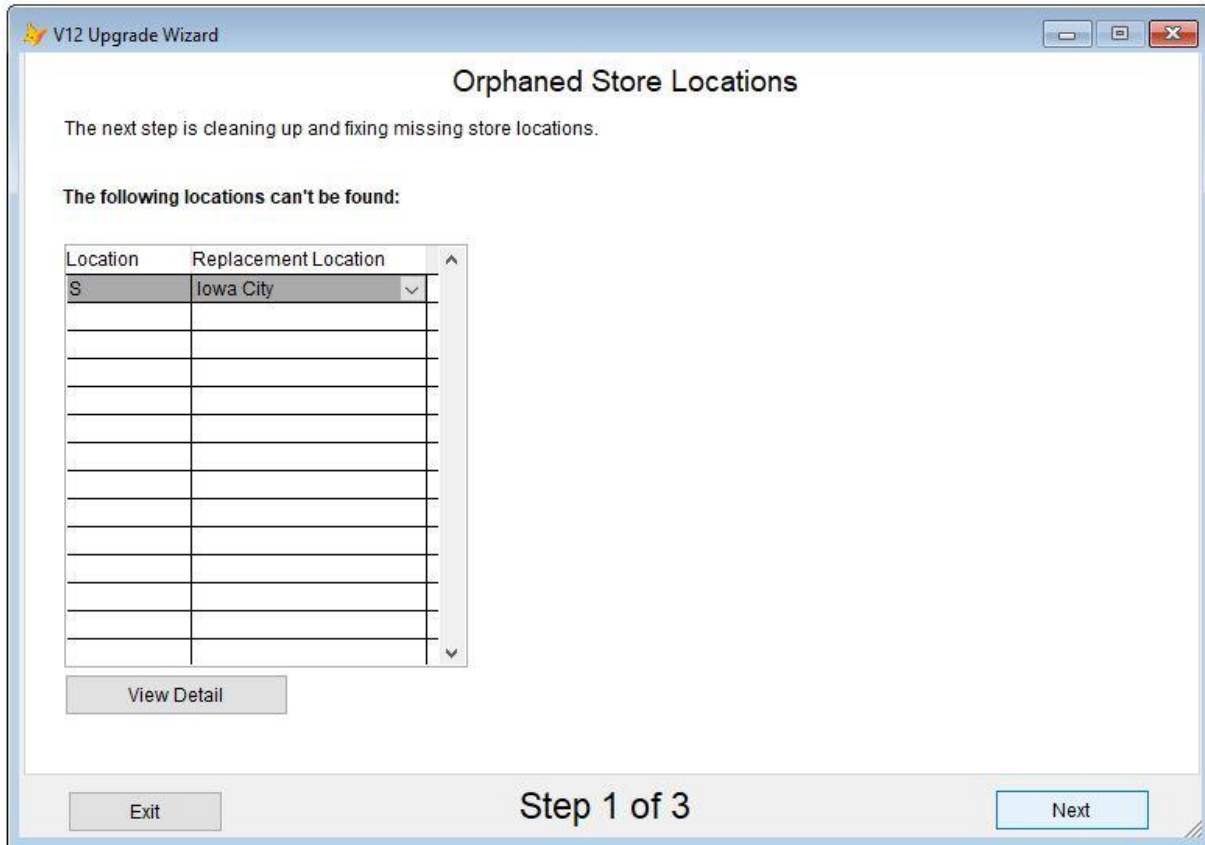
You may also use the button to the right of the grid to create a new employee named "Conversion Orphan" which will then be assigned to all entries that have not already been changed, this will allow you to correct some entries and use the placeholder employee for the rest. In the example screenshot the proceed button was used to fill both entries with the placeholder employee. When finished press **Next**.

Note: The "Conversion Orphan" employee is set to inactive and cannot be used to log on by default.



Orphaned Store Locations

Below is the orphaned store location page, this page lists any store location codes which have been referenced in supporting tables and were not found in the current store location list. Click in the "Replacement Location" column to select a new location. When finished press **Next**.

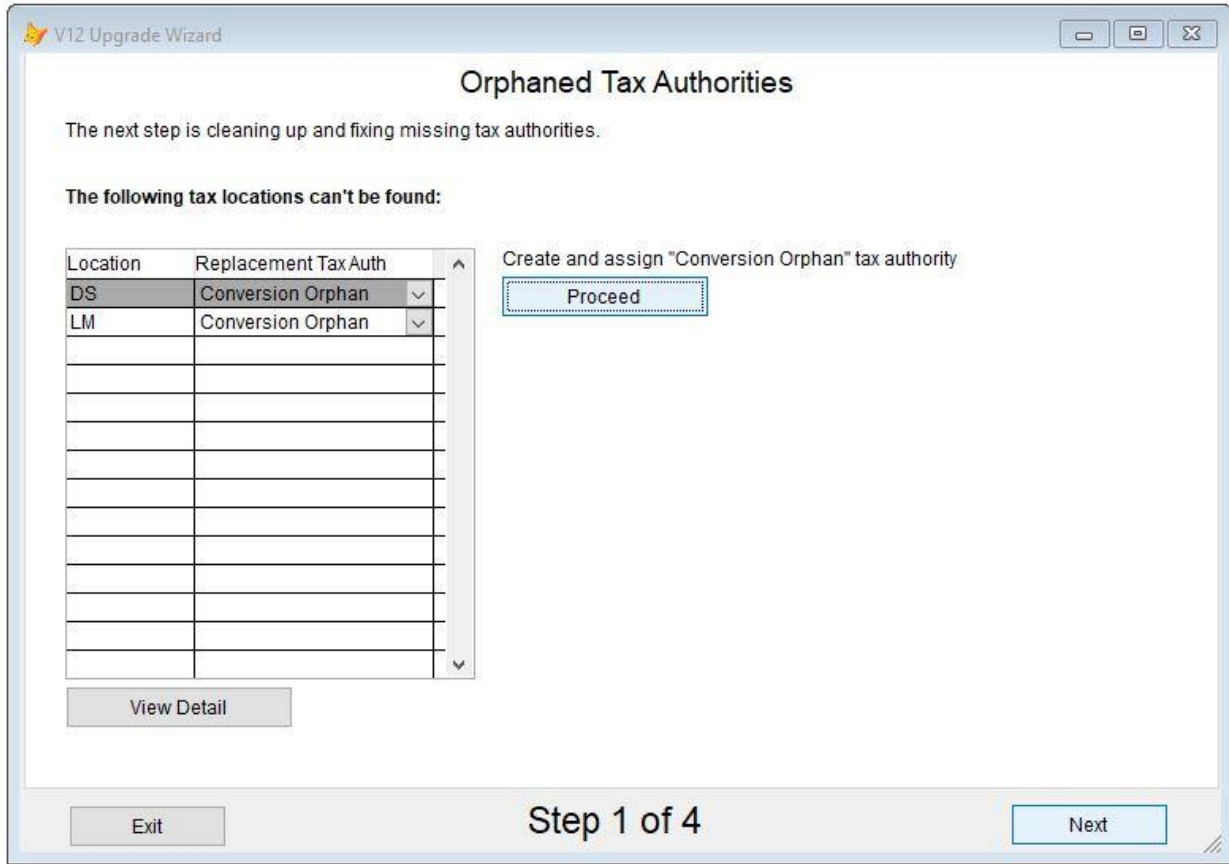


Orphaned Tax Authorities

Below is the orphaned tax authorities page, this page lists any tax authority codes which have been referenced in supporting tables and were not found in the current tax authorities list. Click in the "Replacement Tax Auth" column to select a new tax authority.

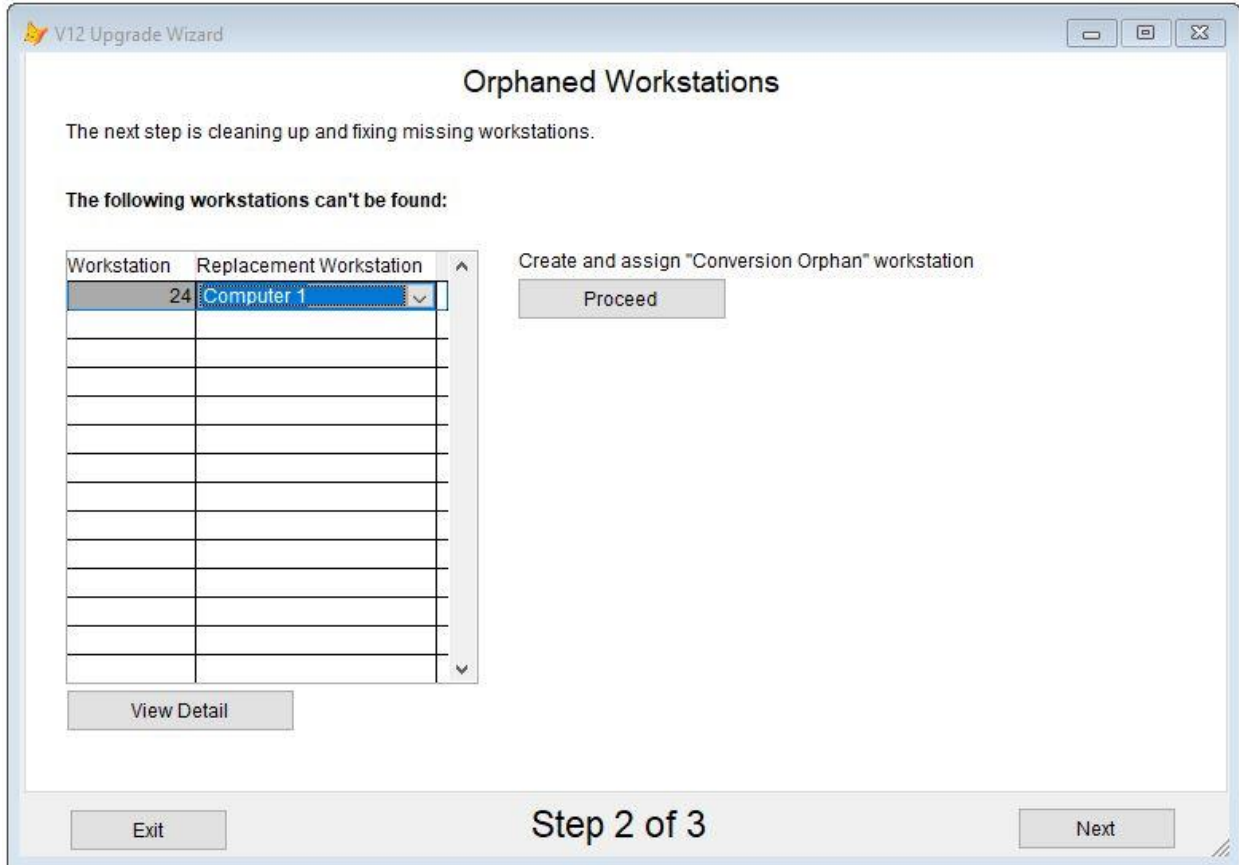
You may also use the proceed button to the right of the grid to create a new customer named "Conversion Orphan" which will then be assigned to all entries that have not already been changed, this will allow you to correct some entries and use the placeholder tax authority for the rest. In many cases using this button will be the best option to handle these tax authorities which were most likely deleted at some time.

When finished press **Next**.



Orphaned Workstations

Below is the orphaned workstations page, this page lists any workstation numbers that have been referenced in supporting tables and were not found in the current workstation list. Click in the "Replacement Workstation" column to select a new workstation. When finished press **Next**.

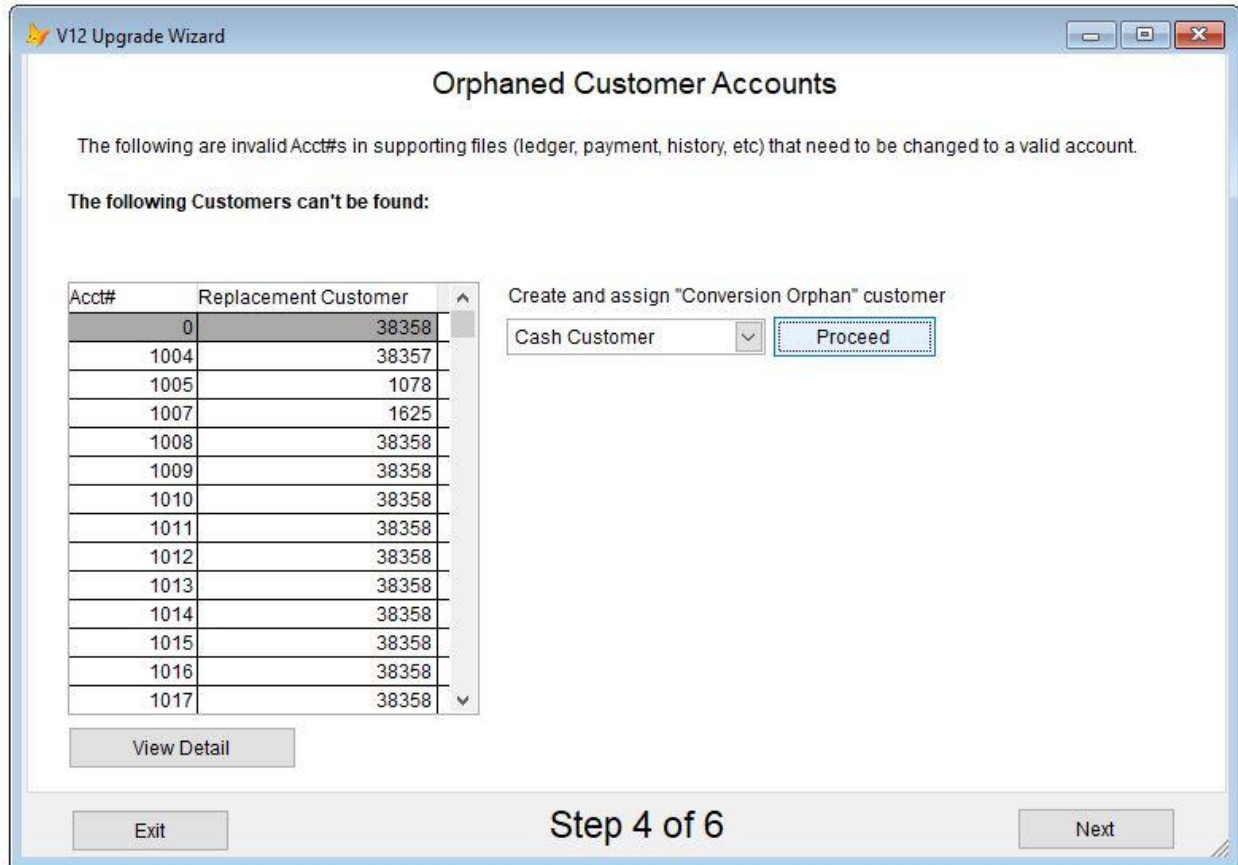


Orphaned Customers

Below is the orphaned customers page, this page lists any customer account numbers which were referenced in supporting tables and were not found in the current customer list. Click in the "Replacement Customer" column to choose a different customer. You can also use the F6 key to select a customer from the customer list.

You may also select a customer default to the right of the grid use the proceed button to create a new customer named "Conversion Orphan" which will then be assigned to all entries that have not already been changed, this will allow you to correct some entries and use the placeholder customer for the rest. In many cases using this button will be the best option to handle these accounts which were most likely deleted at some time.

When finished press **Next**.

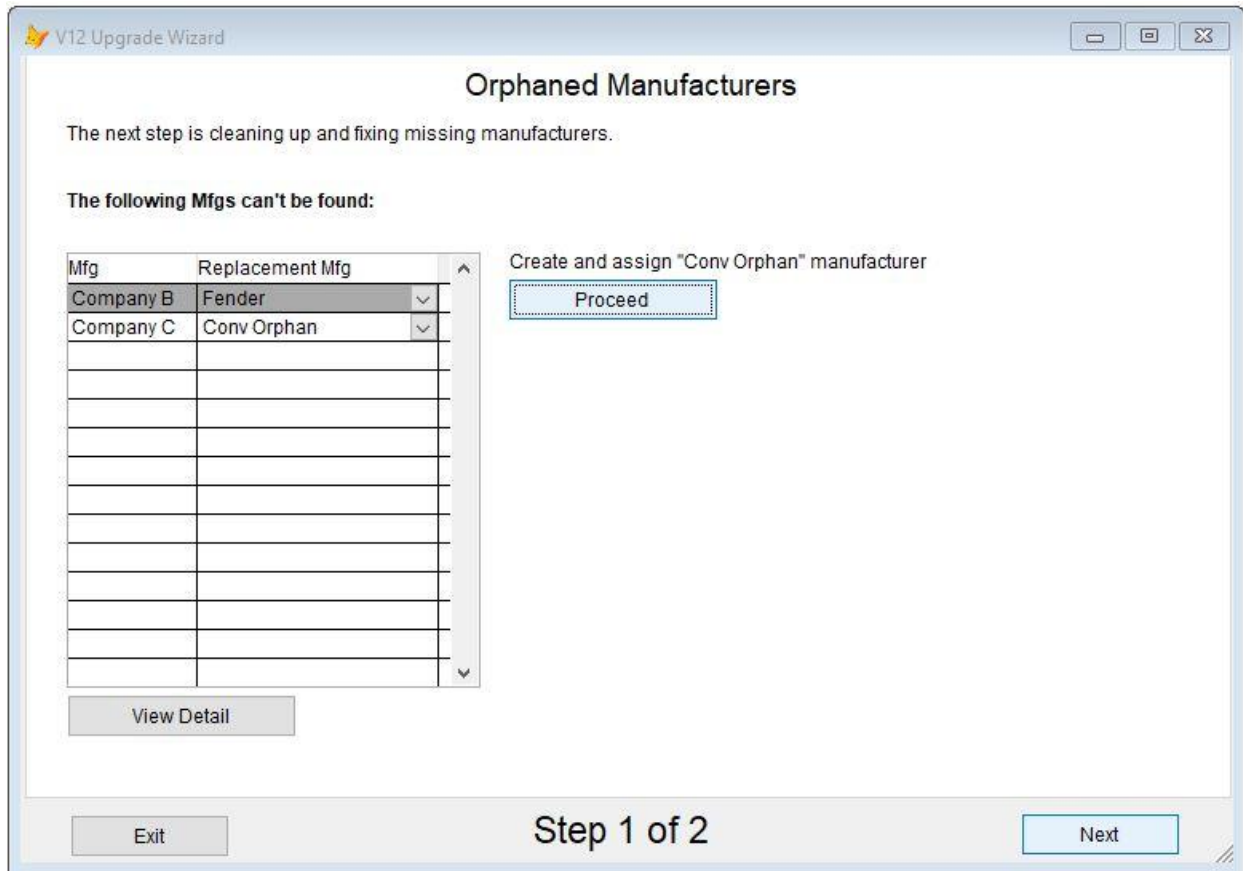


Orphaned Manufacturers

Below is the orphaned manufacturers page, this page lists any manufacturers or publishers that were referenced in supporting tables and were not found in the current manufacturer/publisher list. Click in the "Replacement Mfg" column to choose a different manufacturer.

You may also use the proceed button to the right of the grid to create a new manufacturer named "Conversion Orphan" which will then be assigned to all entries that have not already been changed, this will allow you to correct some entries and use the placeholder customer for the rest. In many cases using this button will be the best option to handle these missing manufacturers which were likely deleted at some time.

When finished press **Next**.

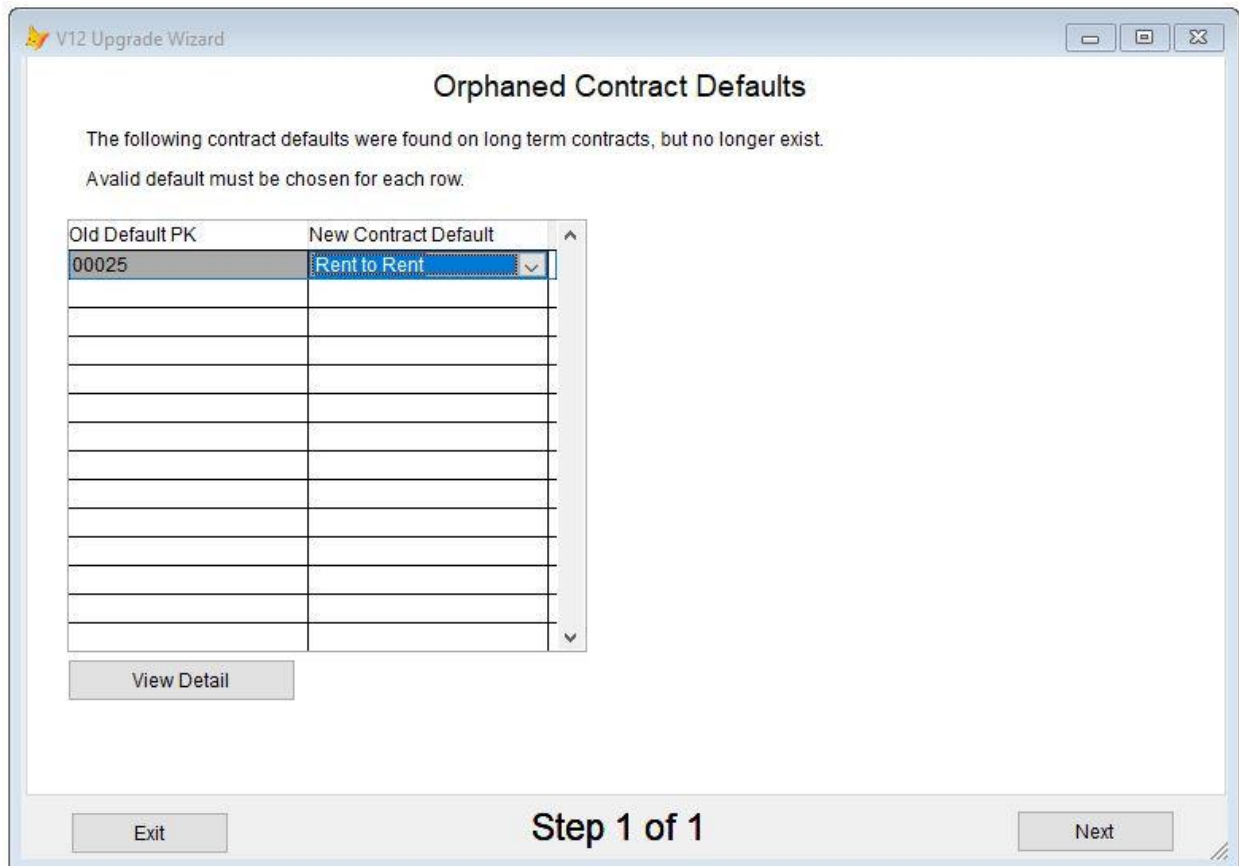


Orphaned Vendors

Below is the orphaned vendors page, this page lists any vendor numbers which were referenced in supporting tables and were not found in the current vendor list. Click in the "Replacement Vendor" column to choose a different customer. You can also use the F6 key to select a vendor from the vendor list.

You may also use the proceed button to the right of the grid to create a new vendor named "Conversion Orphan" which will then be assigned to all entries that have not already been changed, this will allow you to correct some entries and use the placeholder customer for the rest. In many cases using this button will be the best option to handle these vendor accounts which were most likely deleted at some time.

When finished press **Next**.



Orphaned Selection Codes

Below is the orphaned selection codes page, this page lists any inventory selection codes that were referenced in supporting tables and were not found in the current selection code list. There are a few options for correcting these.

To select a different code, click in the “Replacement Sel Code” column.

To create a placeholder selection code and assign all the rows that haven’t been changed to that code, use the proceed button to create a “Conversion Orphan” selection code.

To remove the missing selection code from the referenced records instead of setting it to a new code, use the “Remove Empty” button. This will place “REM” in the remove column. You can also clear this flag with the “Clear Remove Flag” button below it. In many cases the selection codes listed as missing would be codes that had been used in the past and are no longer relevant and so using the remove option would be best.

In the example screenshot the “C” selection code will be changed to “Selection Code A” and any references to selection code “D” will be removed. When finished press **Next**.

Converting v11 to v12

Once the utility is finished, you are ready to convert from v11 to v12 of AIM. Before continuing be sure that you have downloaded both the **AIM v12.exe** and **V12 Converter.exe** installers from the [Member Portal](#) website.

It is strongly recommended that a test conversion to v12 is performed and tested prior to running a final conversion and transitioning to v12.

If any security or menu system setup is done in the test conversion, that setup can be exported from the test database and imported into the final conversion database. See these topics for details: [Export/Import Security Group Permissions](#) , [Export/Import Menu Structure](#).

Note: If you do not see these two installers listed in the program updates section, or you do not have access to download them please e-mail your v11 license details. To send this information to us you will use the **Print License Details** button in AIMsi under Help > About AIMsi. If you have e-mail configured in AIMsi you can simply choose e-mail from the print dialog box and the v12licenseinfo@tritechretail.com address will be pre-populated for you, otherwise, you may save the report as PDF and send it to that e-mail address via your e-mail client.

1. Installing AIM v12

The first step is to install AIM v12 by completing the [Installation & Quick Start Guide](#) through step 26. When the AIM Setup Wizard launches at step 27 you may simply cancel the wizard, exit AIM, and proceed to step 2.

2. Installing the v12 Converter

Next, open the **V12 Converter.exe** that you had previously downloaded. This setup program will install the converter. Once the installation is complete you may proceed to step 3.

3. Converting to AIM v12

Now you are ready to start the conversion process. To begin open the **AIM V11 to V12 Data Converter.exe** file from within the AIM v12 directory.

If AIM v12 was installed to the default location this will be: **c:\AIM V12**.

Note: The converter file should be of type "Application". Do not open the "AIM V11 to V12 Data Converter.exe.config" file which is of type "CONFIG".

AIM V11 to V12 Data Converter version 12.0.2.57

V11 Database

Launch AIM Logging Break Into Steps Use Quick Login Skip Scinavg

Choose default values to be used for records that did not have these links prior to v12.

User

Location

Tax Loc

Workstation

v12 Database

Credit Check Days To Convert

In the converter you will need to choose the **sc.dbc** file from within the data directory of your current v11 AIMsi folder.

Once you have done this, you will be able to select default values for user, location, tax location, and workstation. These values will be used on certain converted records in your v12 database where those links were either missing or didn't exist prior to v12.

Finally, ensure that the **v12 Database** field has been set to the desired option.

- **Production** (default)
Version 11 data will be converted into the main production database that was configured after the v12 install.
- **Training System**
Version 11 data will be converted into the training system database. This can be used if you have used the "Setup Training System" within v12 AIM under the Admin > Utilities menu.
- **Credit Check Days To Convert**
If you are using the AIMsi v11 credit check functionality, enter the number of days of credit check history to convert. This data contains entire credit reports and will impact the size of your v12 database. Generally, 30-60 days is recommended.
- **Launch AIM**
Check to run AIM automatically after converting, this should be checked unless you have been asked to disable by AIM support.
- **Logging**
Check to enable detailed conversion logs. This is not necessary unless recommended by AIM support.

- **Break Into Steps**

Break the conversion process into multiple steps. Leave this unchecked unless it is recommended by AIM support.

- **Use Quick Login**

In AIM v12, a username and password are required for login. A quick login code field can be used to allow logging in with only one value rather than both username and password. Check this option if you would like the converter to enable the quick login functionality and to set v12 user quick login codes using the v11 user's password.

- **Skip Scinvavg**

If you have used the Average Inventory program and Inventory Analysis report in the past, but no longer need them, check this option to skip converting this data which can reduce the converted database size.

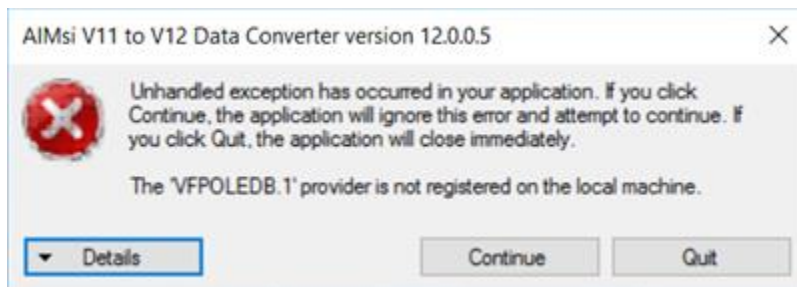
- **Resume Previous Conversion**

Allows resuming a previous conversion that failed. Use when recommended by AIM support.

Once the selections have been made you can begin the conversion by pressing the **Execute** button.

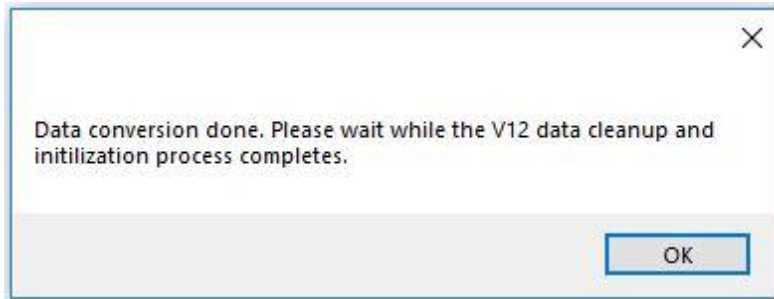
Note: Depending on the size of the v11 AIMsi database, this conversion process will take some time to complete.

If you receive the error below after pressing **Execute**, you will need to download **InventoryExportfix.zip** from the [Member Portal](#). Run both of the installers in the zip file, reboot your computer, and then you may run converter again once the system has restarted.

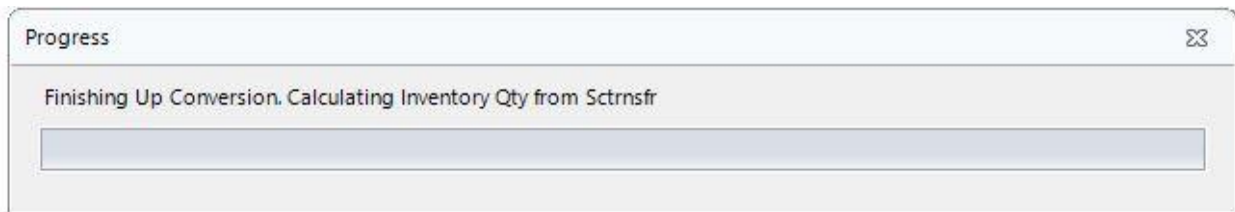


If the conversion process fails for any reason you will receive a dialog box with the reason shown. Please copy down this message, or take a screenshot of the window and contact AIM technical support at **563-556-3556** with this information. Once the issue has been corrected it may be possible to resume the

conversion where it left off rather than restarting from the beginning. The technical support department will assist you with this.



Once the conversion has finished, this dialog above will appear. After pressing **OK** the AIM v12 application will launch and begin the post- conversion cleanup process.



Once the progress window shown above closes, the conversion to AIM v12 is finished and you may begin using AIM.

Note: If you have customized Microsoft Word template files in your AIMsi version 11 templates folder, those files should be copied into the **c:\AIM V12\Templates** directory to ensure that they will be found by AIM v12.

Export/Import Security Group Permissions

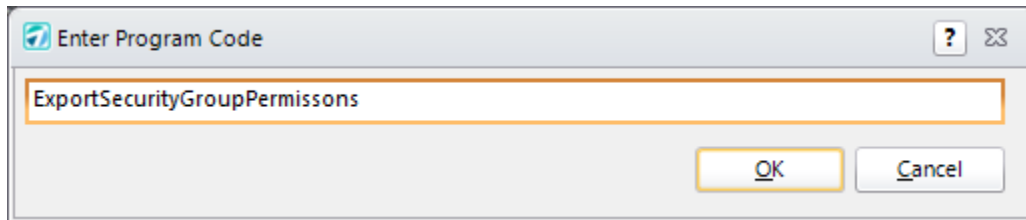
If you have started configuring AIM v12 group security settings while operating in a test conversion of AIM, it is possible to export the configured security items from the test database and import them after running your final conversion.

Exporting

In the test copy of v12 where permissions have been configured. Open Admin > Utilities > Run Off Menu Program.

In the field, enter **ExportSecurityGroupPermissions** as shown in the screenshot below.

Press OK, select a location to save the AIM_Permissions_Export.xlsx file, and press Save. This will create the export file.



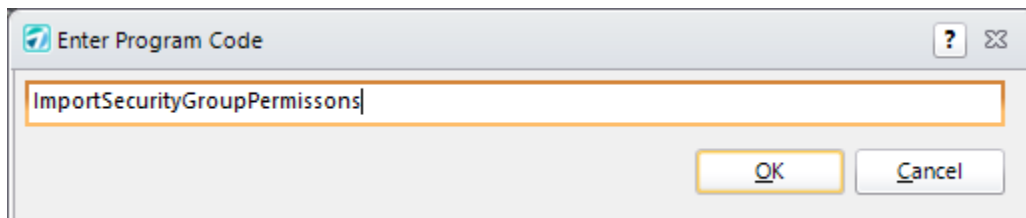
A screenshot of a dialog box titled "Enter Program Code". The dialog box has a light gray background and a white border. At the top left, there is a small icon of a document with a checkmark and the text "Enter Program Code". At the top right, there are two small icons: a question mark and a close button (an 'X' in a square). Below the title bar is a text input field with a white background and a thin orange border. The text "ExportSecurityGroupPermissions" is entered in the field. Below the text field are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a yellow border.

Importing

Once your live copy of v12 has been converted, launch AIM open Admin > Utilities > Run Off Menu Program.

In the field, enter **ImportSecurityGroupPermissions** as shown in the screenshot below.

Press OK, browse to the AIM_Permissions_Export.xlsx file, and press Open to import the security group permissions.



A screenshot of a dialog box titled "Enter Program Code". The dialog box has a light gray background and a white border. At the top left, there is a small icon of a document with a checkmark and the text "Enter Program Code". At the top right, there are two small icons: a question mark and a close button (an 'X' in a square). Below the title bar is a text input field with a white background and a thin orange border. The text "ImportSecurityGroupPermissions" is entered in the field. Below the text field are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a yellow border.

Export/Import Menu Structure

If you have started configuring AIM v12 POS or Touchscreen menus while operating in a test conversion of AIM, it is possible to export these menu systems from the test database and import them after running your final conversion.

Exporting

In the test copy of v12 where your menu system has been configured, open Maintenance > General and select either Touchscreen Menus or Point of Sale Menus depending on which type you need to export.

At the lower right of the window use the Export Menu System button to export the menus to a file. Select a location and enter a filename. If exporting both Touchscreen and Point of Sale menus, it is recommended to use easy to distinguish names such as POSMenus or TouchscreenMenus.

The screenshot displays the AIM v12 menu configuration window. At the top, the 'Description' field is set to 'Start Menu' and the 'Menu System' is set to 'New'. Below these are fields for 'Background' (240, 240, 240) and 'Overlay' (Not An Overlay). A 'Refresh' button is next to the overlay field. Below the background and overlay fields are 'Delete' and 'Add' buttons. The main area contains a grid of buttons: 'Add Button', 'Add Image', 'Add Label', 'Add Divider', and 'Add Other'. To the right of these buttons are checkboxes for 'Use Style of Copied Button For New Buttons', 'Use Size of Copied Button For New Buttons', and 'Use Function of Copied Button For New Buttons'. Below the grid are input fields for '# Of Rows' (8), 'Starting X' (75), '# Per Row' (8), 'Starting Y' (75), 'H Spacing' (10), and 'V Spacing' (10). At the bottom of the grid is an 'Add Multiple Buttons' button. Below the grid is a small text box with instructions: 'Click and drag to move buttons around. Ctrl click and drag to resize buttons. Right click to access the properties menu. Alt click to paste the currently copied style. Shift click to paste the currently copied size.' At the bottom of the window are buttons for 'Generate New Menu System', 'Export Menu System' (highlighted in yellow), 'Swap Sides', 'Delete Entire Menu System', 'Import Menu System' (highlighted in yellow), and 'Exit'.

Importing

Once your live copy of v12 has been converted, launch AIM and open Maintenance > General and select either Touchscreen Menus or Point of Sale Menus depending on which type you need to import.

Now press the Import Menu System button. Browse to the file that was previously exported to import the menu system. Be sure to select the Point of Sale menu file if importing into the Point of Sale Menus program or the Touchscreen file if importing into the Touchscreen Menus program.