



Upgrading from XP

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Introduction

As you may know, Microsoft announced "End of Life" for Windows XP over a year ago. At that time we announced that we would soon stop producing Edge software compatible with Windows XP. That time has come. Upgrading a workstation will require some planning, but upgrading your Edge server requires a bit more care. Here are the high-level steps we recommend for performing an upgrade to a later version of Windows®.



This document contains recommendations and instructions for implementing this approach.

Plan

Because an operating system (OS) upgrade means you must re-install and reconfigure almost everything that runs on that machine, it's a good idea to inventory everything on the machine and plan ahead for getting it back up and running. If you are starting with a whole new machine, these steps don't change that much. A new operating system usually wipes out just about all your old software and settings anyway.

Specific to The Edge, see the sections below for a list of items we know will require some planning.

Preparing for Workstation Upgrades

For a workstation upgrade, you'll need to:

1. Go to **Control Panel=>Programs and Features** and make a list of all the software you use.
2. Plan to download and install new drivers for all of your hardware. You may wish to copy or obtain these files before doing the upgrade. These files can probably found on the manufacture's website.

Preparing for Server Upgrades

For a server upgrade:

1. Go to **Control Panel=>Programs and Features** and make a list of all the software you use.

2. Plan to download and install new drivers for all of your hardware. You may wish to copy or obtain these files before doing the upgrade. These files can probably found on the manufacture's website.
3. Make a list of all the features of The Edge that your server handles and make notes about the configurations and settings. This might include:
 - Multi-Store Configuration and Transfers
 - QuickBooks
 - Credit Card
 - SQL/Access Database Path
 - Postcard Configuration
 - Third-Party Website
 - Peripheral Hardware used for The Edge (barcode scanners, tag printers, cash drawers, report printers, cameras, etc.)

Performing the Upgrade

When you are ready to perform the upgrade:

1. Specific to The Edge, make sure you make a full backup of your production database on another machine as described in The Edge User Guide.
2. Make backup copies of all other databases on another machine (server only).
3. Make copies of all software installation files on another machine.
4. Install the Windows upgrade or go to the new machine. This will take some time while Windows writes all the new files.
5. Install The Edge by downloading a setup file, not an update file. Go to <http://edgeuser.com/Downloads/Edge16Downloads.aspx> or <http://edgeuser.com/Downloads/Edge6xDownloads/DownloadEdge60Software.aspx> as appropriate and locate the most recent setup file.
6. Copy your Edge database back to the database path (server only).
7. Test The Edge to make sure it is operating.
8. After configuring all the features and hardware as described below, perform steps 1-7 on all the workstations and configure any hardware on them.

Instructions for performing these steps are contained in The Edge User Guide.

Reconfigure

After The Edge is up and running, you will need to reconfigure or test the special features that are integrated with The Edge. You may wish to obtain assistance from The Edge Technical Support, but much of this is detailed in The Edge User Guide.

1. Reconnect and configure each piece of hardware, testing The Edge as you go.
2. Configure features mentioned in planning and test each:
 - a. QuickBooks
 - b. Multi-Store with a test transfer

- c. Credit Cards
 - d. SQL/Access Database Path
 - e. Postcard Configuration
 - f. Third-Party Website
 - g. Peripheral Hardware used for The Edge.
3. Install other software and move data back into place as desired.