

ParishSOFT Version 3.6.1x Update Instructions



Attention

Please read these instructions completely before proceeding with the update of your software to version 3.6.12 to ensure you fully understand each step before beginning.

If you experience any difficulties with the update, please contact Parishsoft support at 866-930-4774 ext 2 or at support@parishsoft.com.

1. Back up your reports file on each workstation using ParishSOFT in your office and then backup the database from just one workstation before updating any computers.
 - a. Logon to any ParishSOFT module as a Parish Administrator. Go to the About screen, and write down your Version Number with Service Release. Now click on the ParishSOFT System Information button.
 - b. Select Perform Backup. [If you are “not authorized to perform this action” you are not signed on as a Parish Administrator in ParishSOFT.]
 - c. Place a check on the left side beside the current day of the week.
 - d. Click on backup on the right of the row you placed the check in.
 - e. Click on Backup Reports Files Locally to save the PsReports2000.mdb file and your PsTuition2000.mdb file (note the location they saved to).

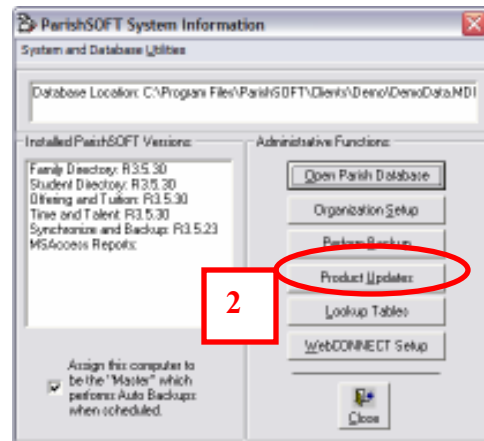
→If you do not see the button, Backup Reports Files Locally, go to My Computer \ Local Disk C\ Program Files\ ParishSOFT. Locate PSReports2000.mdb, right-click on this file, and select Rename. Change the name of this file to PSReports2000backup.mdb.

f. If you have modified your End of Year Statements, you will also need to backup

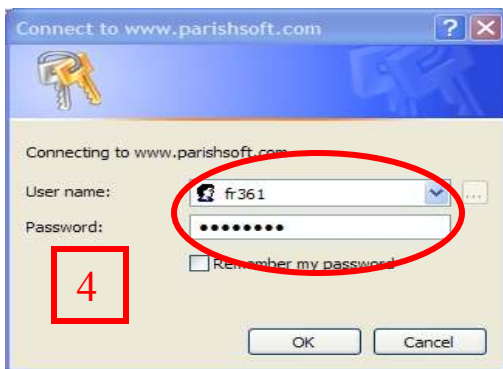
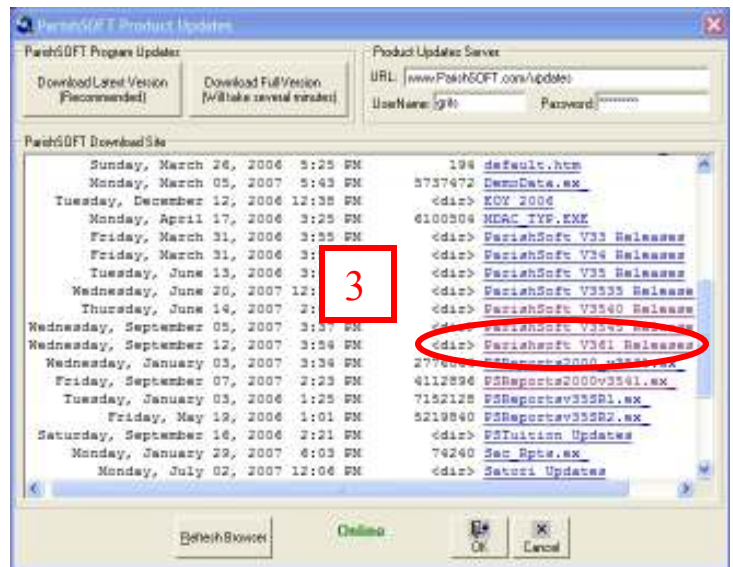
your ContribReports File. Open My Computer, go to Local Disk (C)/Program Files/ Parishsoft. Find the file titled ContribReports2000.mdb. Right-click and rename to ContribReportsOld.mdb.

2. Close the Perform Backup screen and select the Product Updates button.

→If you receive a message, “WebCONNECT! is currently disabled,” select WebCONNECT Setup, and Enable/Disable WebCONNECT. Now return to ParishSOFT System Information, and select Product Updates.



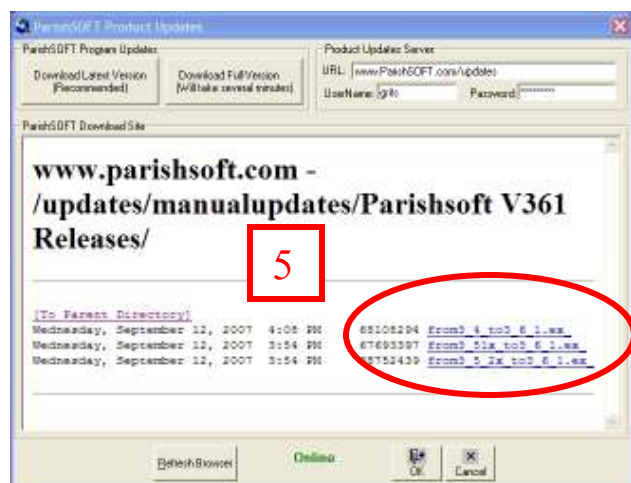
3. Scroll down in the Manual Updates Area of the screen and select Parishsoft V361 Releases.



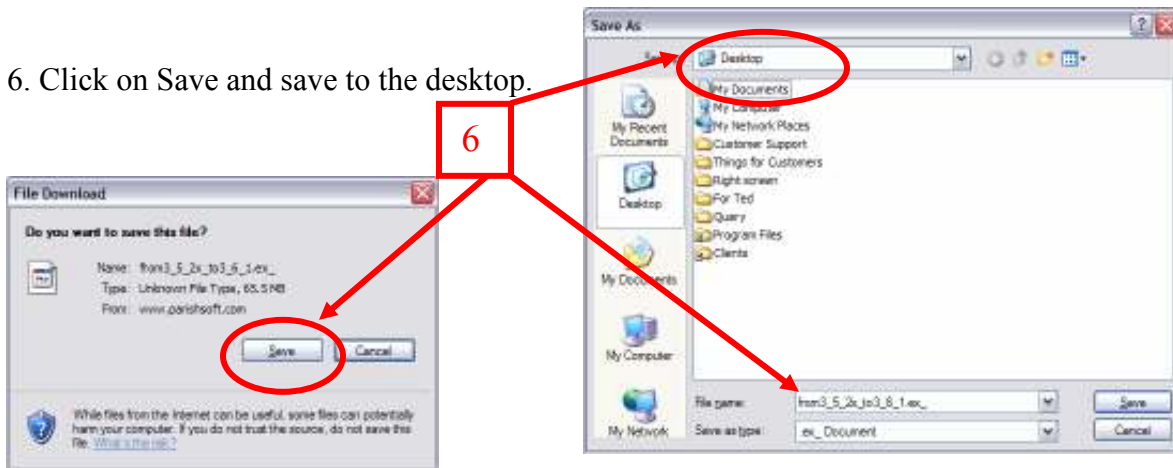
4. In the User Name enter fr361 and the Password fall2007.

5. Select the update file corresponding to your current version.

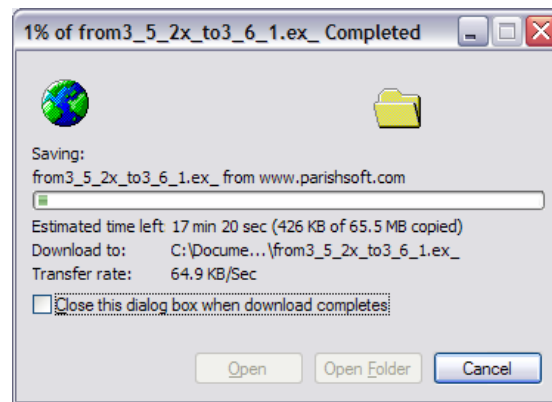
Anyone who is 3.5.20 or higher please use the from 3_5_2x_to3_6_1.ex_file.



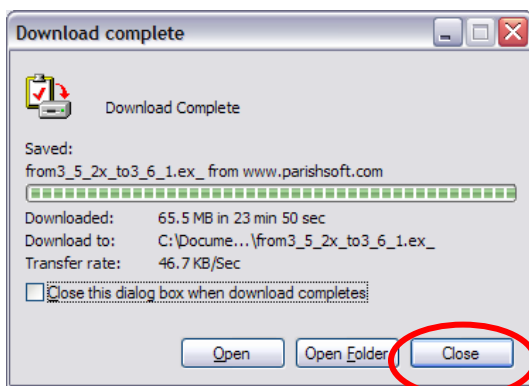
6. Click on Save and save to the desktop.



7a. You will see this screen showing you the progress of the download.



7b. Click Close.

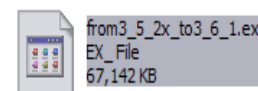


7a.

7b.

8. After the download is complete, close all open windows and all ParishSOFT applications [Note, be sure to check in the lower right-hand corner, you may be running other ParishSOFT modules that are hidden there].

9. Find on your Desktop the icon similar to the one on the right. Right click on it and select rename. Use the right arrow key to move to the end of the file name and change the file extension type from *.ex_ to *.exe and leave the rest of the file name the same.



If you do not see the file extension, Click on My Computer, Tools, Folder Options, and the View Tab. Uncheck the check box in front of "Hide File Extensions for known file types". Click Apply, and then OK. You will now be able to see the file extensions.

10. The icon should look like the icon on the right when done. Double Click on the icon to start the update. Follow the prompts in the Install Shield Wizard to install the update, selecting Next and Yes to All on the screens.



11. At this point, make sure that no one else in the office is working in any ParishSOFT software.

12. After the software update is complete, you must complete the version change on your Database.

13. Open any of the software modules your parish has purchased, including Family Directory, Offering, Religious Education, and Time and Talent. This will run through Updating and Indexing and the Version Change to fully update your Database to the latest version of your software.

14. At this point you can begin updating each of the other computers that run ParishSOFT.

- ***Remember*** you will need to backup the Reports file on each computer that you update to save any custom queries or custom reports. To do this, logon to any ParishSOFT module as a Parish Administrator. Go to the About screen and click on the ParishSOFT System Information button. Select Perform Backup and then click on Backup Reports Files Locally.
- After updating your computer you can import your custom queries and reports back into the new reports file. (See next page.)

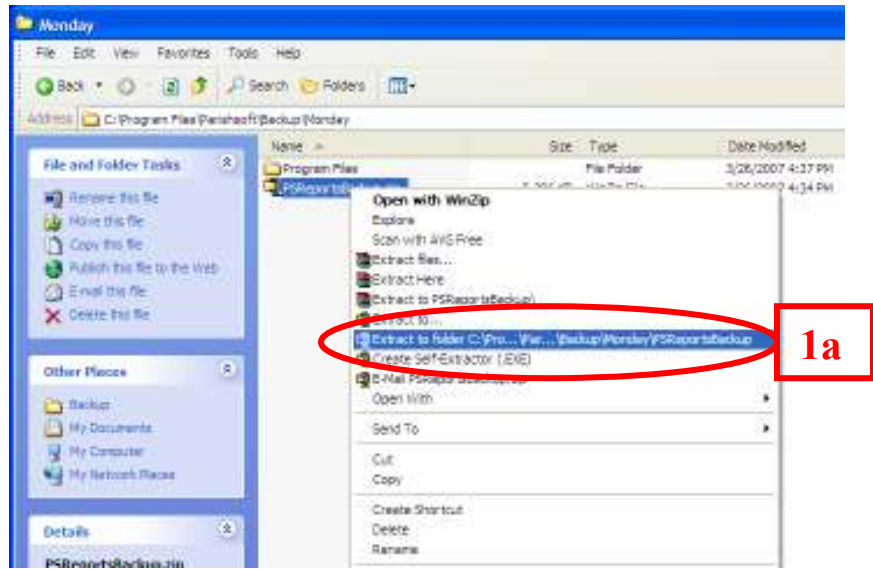
A. Create a folder named **SharedUpdates** in the same location as your parish database.

B. Copy the file that you renamed in step #10 (e.g., *from3_4_to3_6_1.exe*) into the **SharedUpdates** folder.

When any workstation using ParishSOFT tries to open a ParishSOFT module, the system will determine whether an update is needed and prompt the user to install the update. This ensures that all ParishSOFT users in your office are using the same version.

IMPORT YOUR CUSTOMIZED REPORTS

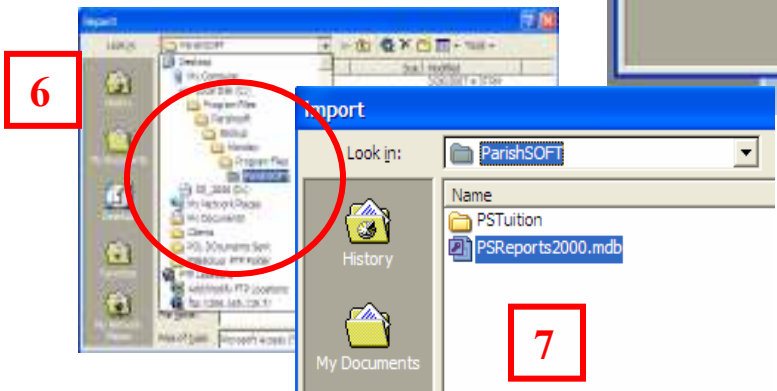
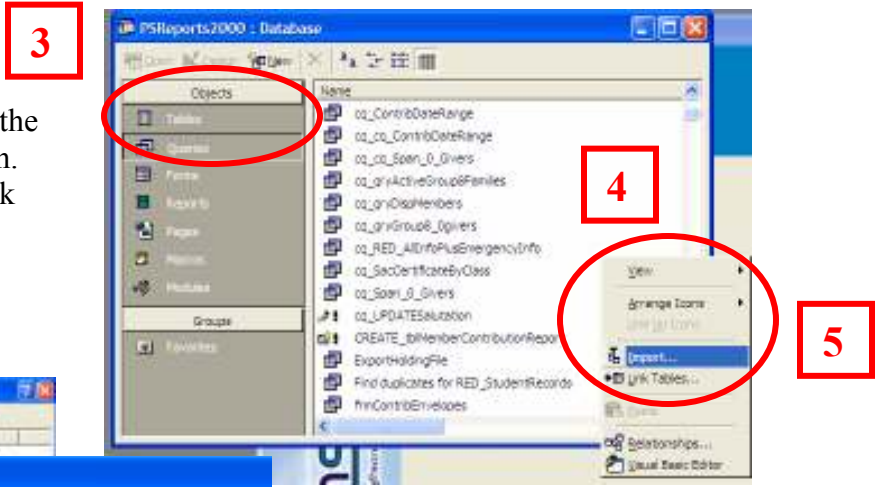
1.a. If you used the Backup Reports Locally Option, open My Computer, and navigate to C:\Program Files\Parishsoft\Backup\ (Day of the Week). You will see a file called PsReportsBackup.zip. Right click and select Extract. Use either WinZip or the Windows Compression Wizard to extract the file to the C:\Program Files\Parishsoft\Backup\day\PsrReportsBackup folder.



1.b. If you used the methods of renaming your reports file or saving the backup to the desktop, simply proceed to step 2.

2. After updating your software, Open Reports/Parishsoft Reports. Click on the F11 function key on the keyboard.

3. On the Database window that opens, select Queries on the left side in the Objects section.
4. On the Right side in a blank area, right click.
5. Select Import.

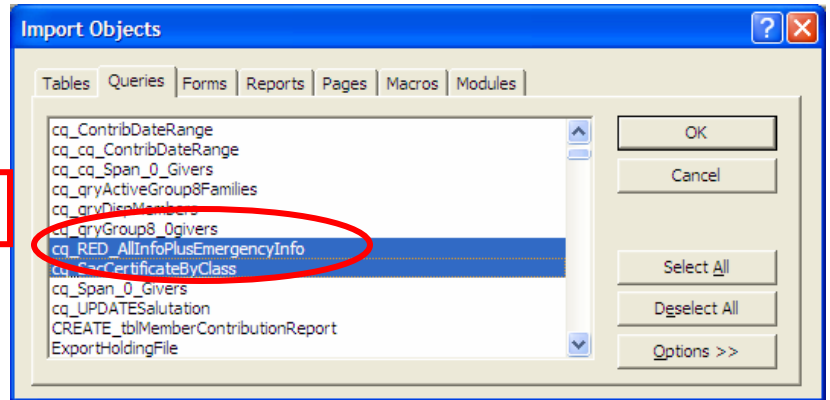


6. A search window will open defaulting to the My Documents folder. Navigate to your report backup that will be in the Parishsoft folder, on the desktop, or in the Parishsoft Backup folder depending on which backup method you used.

7. Select the File you saved (see above) and click Import.

8. At this point an import wizard will open, defaulting to the Query tab. Single click on all of the custom queries you need to import. (If you have used the standard procedure, the queries will either start with cq_ or your initials, or both.) To select multiple queries at the same time, single left click on the first query and then hold down the control key while you single left click all the other queries you need to import.

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9. After selecting all of your custom queries, then click on the Reports tab and find all of the reports that begin with your initials. As in step 8, single click to select each of them, holding down control to select multiple reports at once.
10. After selecting all of your custom queries, then click on the Reports tab and find all of the reports that begin with your initials. As in step 8, single click to select each of them.
11. Once all queries and reports you need are selected (highlighted in blue), click on Ok. After the screen flickers a little, you will be back at the database window and all of the imported objects will now be listed in the database window.
12. Close the database window by clicking on the red “X” in the top right corner. When prompted, click “Yes” to exit the program and application.
13. To utilize those reports and queries, simply go back into Parishsoft Reports and use the method for custom reports and queries you have used in the past.
14. To Import your customized End of Year reports, after you have opened up the Periodic Contributions Screen, Click on F11. Now follow steps 3-12 above to locate and import from the saved ContribReportsOld.mdb file.
15. To import your Customized Tuition Reports, after you have opened the Tuition Module, Click F11 and again follow steps 3-12 to locate and import from the saved PsTuition2000.mdb file (Remember this is probably in the location from step 1. on the Import Page)