



# SECURE PERFECT® 6.1 upgrades from versions 3.1, 4.0, and 5.0

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## Overview

**Throughout this document, reference to Secure Perfect is represented as “SP” in text content to avoid repetition where the product name and/or version may have already been established.**

This document details upgrading your current SP3.1, Secure Perfect 4.0, or Secure Perfect 5.0 system to Secure Perfect 6.1.

***Note:** To upgrade from Secure Perfect 6.0 to Secure Perfect 6.1, refer to the upgrade section of the Secure Perfect 6.1 Installation Manual.*

## Processing a Secure Perfect Upgrade/Conversion From Versions Earlier Than 3.1 to Version 6.1

GE does not provide media for an upgrade/conversion from a version earlier than 3.1 to Secure Perfect Version 6.1. For a nominal fee, GE provides a service for converting these earlier versions. After logging onto our Web site at [www.ge-security.com](http://www.ge-security.com), click **Downloads**, then **Database Conversions**, for additional details.

***Note:** Support for versions of Secure Perfect prior to 3.1 will be provided on a best effort basis.*

## Upgrading Professional Servers

The Secure Perfect 6.1 Professional Server computer runs on Windows 2000 Professional or Windows XP Professional. Client computers can run on Windows 2000 Professional or Windows XP Professional.

After you have upgraded the Server computer, you will need to upgrade your client computers. This will be discussed following the Server upgrade, in [“Upgrading Client Computers” on page 112](#).

Currently, upgrades from three previous versions are supported. Choose from the list below and refer to the appropriate page.

- [“SP3.1 to Secure Perfect 6.1” on page 2](#)
- [“SP 4.0 to Secure Perfect 6.1” on page 20](#)
- [“SP 5.0 to Secure Perfect 6.1” on page 34](#)

## SP3.1 to Secure Perfect 6.1

You may follow one of two scenarios when converting to SP 6.1:

**Note:** *If your SP 6.1 Server computer will be the same computer as your existing Secure Perfect system, refer to Scenario 1. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.*

**Scenario 1:** The SP 6.1 Server computer will be the **same** computer as the existing SP3.1 computer.

**Scenario 1 begins on [page 2](#).**

**Note:** *If you plan on using a new or different computer for your SP 6.1 Server, refer to Scenario 2. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.*

**Scenario 2:** The SP 6.1 Server computer will be a **different** computer than the existing SP3.1 computer.

**Scenario 2 begins on [page 11](#).**

### Scenario 1 - Same Computer

If your SP 6.1 Server computer will be the same computer as your existing SP3.1 system, then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using the same computer:**

**Note:** *To perform the upgrade, log in as a user with administrative rights, such as administrator.*

[“Before You Begin” on page 3](#)

1. [Note all Secure Perfect Operator Passwords \(page 3\)](#)
2. [Stop Secure Perfect Services on SP3.1 Server \(page 3\)](#)
3. [Back Up Secure Perfect Folder \(page 4\)](#)
4. [Back Up SP3.1 Databases \(page 4\)](#)
5. [Uninstall Imaging Software \(page 5\)](#)
6. [Uninstall Microsoft SQL Server Desktop Engine \(page 6\)](#)

7. [Install Secure Perfect 6.1 \(page 6\)](#)
8. [Restore SP 3.1 Databases on Secure Perfect 6.1 Server \(page 7\)](#)
9. [Run Create SP Database \(page 8\)](#)
10. [License Your Secure Perfect 6.1 System \(page 9\)](#)
11. [Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server \(page 9\)](#)
12. [Activate Enable Unique & Required Employee Number \(page 9\)](#)
13. [Upgrade Client Computers \(page 10\)](#)
14. [Put Micros Online and Flash Application Code \(page 11\)](#)

## Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

### 2. Stop Secure Perfect Services on SP3.1 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or SP3.1 as long as the services are set for automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP3.1 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

#### ➤ To stop services on the SP3.1 Server computer and all clients:

1. You **MUST** be logged in as the administrator user. If not, log out and log back in as a user with these permissions.

2. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

3. Locate the three Secure Perfect services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
4. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

5. Exit the **Services** application.

### 3. Back Up Secure Perfect Folder

Everything in your existing SP3.1 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

### 4. Back Up SP3.1 Databases

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

#### ► To back up your Secure Perfect databases:

1. Create a folder on your system where the backup files will be stored.
2. Click **Start, Programs, Secure Perfect**, then **Backup & Restore SP Databases**.

If this utility is not found in the **Start** menu, then go to the Secure Perfect directory and double-click the file: `Maintenance.exe`

**Result:** A **Maintenance** window displays.

3. Click **Backup**.

**Result:** A **Maintenance - [Backup]** destination window displays.

4. Accept the default **Login** of 'sa' and enter the **Password** for sa. If you have not already done so, we strongly suggest that you assign a unique password of your choice.
5. Navigate to the drive and directory folder on your system where the backup files will be stored. Double-click to open the **Destination** folder.
6. Holding down the left mouse button, drag and drop the destination folder onto each of the fields:
  - SecurePerfect
  - SecurePerfectArchive
  - SecurePerfectHistory

**Result:** The .BAK files in each field will be named automatically to include the directory path, file name, date, and time.

7. If you choose not to back up a specific database, clear the check box at the end of that field. If the check box is selected but no destination is entered in the database field, backup of that database file will not occur.
8. Click **Backup**.

**Result:** The backup process begins. When backup is complete, a dialog box displays a message verifying the successful backup of the chosen databases.

9. Click **OK**.
10. Exit the **Maintenance** window.
11. If Imaging is installed, it must be uninstalled before continuing with the upgrade. Refer to [5. "Uninstall Imaging Software" on page 5](#).

Otherwise, continue to [6. "Uninstall Microsoft SQL Server Desktop Engine" on page 6](#).

## 5. Uninstall Imaging Software

Imaging needs to be uninstalled to proceed with the upgrade.

### ► To uninstall Imaging software:

1. Log in as the local administrator user.
2. Click **Start**, select **Settings**, **Control Panel**, and then **Add/Remove Programs**.
3. On the **Add/Remove Program Properties** page, select **Imaging Option 1.2**.
4. Click **Change/Remove**.
5. On the **Choose Setup Language** page, select **English**.

6. Click **OK**.

**Result:** The **Install Shield Wizard** progress screen displays.

7. You will receive a **Confirm File Deletion** popup. When asked, **Do you want to completely remove the selected application and all of its components?** click **OK**.
8. You will receive a **Maintenance Complete** screen, **Install Shield Wizard has finished performing maintenance operations on Imaging Option 1.2**. Select **Yes** to reboot your computer at this time. Click **Finish**.

**Result:** You are returned to the **Add/Remove Programs** screen. Your system reboots at this time.

## 6. Uninstall Microsoft SQL Server Desktop Engine

MSDE needs to be uninstalled to proceed with the upgrade.

### ► To uninstall MSDE software:

1. Log in as the local administrator user.
2. Refer to [“Removing Microsoft SQL Server Desktop Engine \(MSDE\) - Secure Perfect 6.1 Professional” on page 15.9](#) of the *Secure Perfect 6.1 Installation Manual*.

## 7. Install Secure Perfect 6.1

### ► To install the SP 6.1 application:

1. You **MUST** be logged in as the local administrator user. If not, log out and log back in as a user with these permissions.
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - SP3.1 is automatically uninstalled. (See steps below if the uninstall does not proceed.)
  - The ‘Create SP Database’ utility automatically launches.
  - The license application automatically launches. **DO NOT license at this time (as instructed in the sequence)**. You will license your system after the database is converted.

### ► If the uninstall does not proceed (hangs), follow the instructions below:

1. Click **Ctrl-Alt-Delete**.
2. The **Windows Security** dialog displays.

3. Click **Task Manager**.
4. At the **Task Manager** window, **Install** will display a status of **Not Responding**.
5. Select the line **Uninstall** and click **End Task**.
6. At the next dialog, click **End Task** again.
7. Once the steps above are completed, follow the instructions in the sections of the *Secure Perfect 6.1 Installation Manual* listed below:
  - “Verifying and Cleaning Up after an Uninstall” on page 15.4
  - “Verifying Secure Perfect Uninstalled Cleanly” on page 15.4
  - “Deleting Subkeys from the Registry” on page 15.4
  - “Windows 2000 Registry Permission Validation” on page 15.6 (if applicable)

## 8. Restore SP 3.1 Databases on Secure Perfect 6.1 Server

These restore procedures are guidelines only.

**Note:** When you are restoring the SP3.1 databases, you will replace the databases that were created during the SP 6.1 installation.

### ► To restore the SP3.1 databases backup:

1. Verify that SP 6.1 is installed on the destination computer.
2. Stop SP 6.1 services.
3. Click **Start, Programs, Secure Perfect**, then **SP Maintenance Utility**.

If this utility is not found in the **Start** menu, then go to the Secure Perfect directory and double-click the file: `Maintenance.exe`

**Result:** A **Maintenance** window displays.
4. Click **Restore**.

**Result:** A **Maintenance - [Restore]** destination window displays.
5. Accept the default **Login** of ‘sa’. Enter the ‘sa’ password, if applicable. If you have not already done so, we strongly suggest that you assign an SQL System Administrator password to your database using the SP Maintenance Utility.
6. Navigate to the drive and directory folder on your system where the backup files are presently stored. Double-click to open the folder.
7. Holding down the left mouse button, drag and drop from the **Backup Source File** window onto each of the fields:
  - SecurePerfect
  - SecurePerfectArchive

- SecurePerfectHistory

8. If you choose not to restore a specific database, clear the check box at the end of that field. If the check box is checked, but no destination is entered, the restoration will not occur.

9. Click **Restore**.

**Result:** The restoration process begins. When restoration is complete, a dialog box displays a message, verifying the restoration of the chosen databases.

**Note:** The restoration message includes text advising that you must license your SP 6.1 system.

10. Click **OK**.

11. Exit **Restore**. The database restoration is complete.

## 9. Run Create SP Database



The database Server computer **MUST** be the computer on which you run the database conversion.

The 'Create SP Database' utility converts the SP3.1 database format to SP 6.1 database format.

**Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.

### ► To run 'Create SP Database' on your SP 6.1 Server computer:

1. Click **Programs, Secure Perfect**, then **Create SP Database**.

**Result:** The **Select Secure Perfect Edition** window displays.

2. Select **Professional Edition** and click **Next**.

**Result:** The **Create/Convert Database** window displays.

3. Enter your 'sa' password.

4. Click **Create/Convert Database**.

**Result:** A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect.

5. Click **Yes** to proceed.

**Result:** The **Convert Database** window displays.

6. Click **Convert Database**.

**Result:** A status bar displays the progress of the conversion. Upon completion, the message **Secure Perfect Database successfully converted!** displays.



7. Click **OK**.

## 10. License Your Secure Perfect 6.1 System

At this time, you must license SP 6.1. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 11. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step restores the SP3.1 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP3.1 backup source into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP3.1 backup source into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP3.1 backup source into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP3.1 backup source into the Signature folder on the SP 6.1 Server computer.

## 12. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [13. "Upgrade Client Computers" on page 10](#).

2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).
  - OR
  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**

5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**

6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 13. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 14. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 3.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

### *Scenario 2 - Different Computer (Using Two Computers)*

**If your Server computer will be a different computer than your existing Secure Perfect computer,** then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using a second computer:**

“Before You Begin” on page 12

1. Note all Secure Perfect Operator Passwords (page 12)
2. Set Up Secure Perfect 6.1 Server (page 12)
3. Stop Secure Perfect Services on SP3.1 Server (page 12)
4. Back Up Secure Perfect Folder (page 13)
5. Back Up SP3.1 Databases on SP3.1 Server (page 13)
6. Restore SP3.1 Databases on Secure Perfect 6.1 Server (page 14)
7. Run Create SP Database (page 15)
8. License Your Secure Perfect 6.1 System (page 16)
9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 16)
10. Activate Enable Unique & Required Employee Number (page 17)
11. Upgrade Client Computers (page 18)
12. Put Micros Online and Flash Application Code (page 18)
13. Uninstall SP3.1 from the Original Computer (page 18)
14. Uninstall Imaging Software from the Original Computer (page 19)
15. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer (page 19)

## Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

## 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

## 2. Set Up Secure Perfect 6.1 Server

### ► To set up your SP 6.1 Server computer:

1. Since your new SP 6.1 database Server will be a different computer than your current SP3.1 Server, you will need to configure the computer now. This includes setting up:
  - Hardware (such as the monitor, network board, and Digi board, if one is used)
  - Windows 2000 Professional or Windows XP Professional operating system
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - The 'Create SP Database' utility automatically launches.
  - The license application automatically launches. **DO NOT license at this time (as instructed in the sequence).** You will license your system after the database is converted.
3. Return to this point and continue.

## 3. Stop Secure Perfect Services on SP3.1 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or Secure Perfect as long as services are set to automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP3.1 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

➤ **To stop services on the SP3.1 Server computer and all clients:**

1. Set all micros offline in Secure Perfect.
2. You **MUST** be logged in as the administrator user. If not, log out and log back in as a user with these permissions.
3. Click **Start, Settings, Control Panel, Administrative Tools, then Services**.

**Result:** The **Services** window displays.

4. Locate the three Secure Perfect services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
5. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

6. Exit the **Services** application.

#### 4. Back Up Secure Perfect Folder

Everything in your existing SP3.1 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Images, Graphics, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

#### 5. Back Up SP3.1 Databases on SP3.1 Server

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

➤ **To back up the database files:**

1. Create a folder on your system where the backup files will be stored.

2. Click **Start, Programs, Secure Perfect**, then **Backup & Restore SP Databases**.

If this utility is not found in the **Start** menu, then go to the Secure Perfect directory and double-click the file: `Maintenance.exe`

**Result:** A **Maintenance** window displays.

3. Click **Backup**.

**Result:** A **Maintenance - [Backup]** destination window displays.

4. Accept the default **Login** of sa. Enter the 'sa' password, if applicable. If you have not already done so, we strongly suggest that you assign a unique password of your choice.
5. Navigate to the drive and directory folder on your system where the backup files will be stored. Double-click to open the **Destination** folder.

6. Holding down the left mouse button, drag and drop the destination folder onto each of the fields:

- SecurePerfect
- SecurePerfectArchive
- SecurePerfectHistory

**Result:** The .BAK files in each field will be named automatically to include the directory path, file name, date, and time.

7. If you choose not to back up a specific database, clear the check box at the end of that field. If the check box is selected but no destination is entered in the database field, backup of that database file will not occur.

8. Click **Backup**.

**Result:** The backup process begins. When backup is complete, a dialog box displays a message verifying the successful backup of the chosen databases.

9. Click **OK**.

10. Exit the **Maintenance** window.

## 6. Restore SP3.1 Databases on Secure Perfect 6.1 Server

These restore procedures are guidelines only.

**Note:** When you are restoring the SP3.1 databases, you will replace the databases that were created during the SP 6.1 installation.

### ► To restore the SP3.1 databases backup:

1. Verify that SP 6.1 is installed on the destination computer.
2. Stop SP 6.1 services.

3. Click **Start, Programs, Secure Perfect**, and then **SP Maintenance Utility**.

**Result:** A **Maintenance** window displays.

4. Click **Restore**.

**Result:** A **Maintenance - [Restore]** destination window displays.

5. Accept the default Login of 'sa' and 'master' as the password.
6. Navigate to the drive and directory folder on your system where the backup files are presently stored. Double-click to open the folder.
7. Holding down the left mouse button, drag and drop from the **Backup Source File** window onto each of the fields:

- SecurePerfect
- SecurePerfectArchive
- SecurePerfectHistory

8. If you choose not to restore a specific database, clear the check box at the end of that field. If the check box is checked, but no destination is entered, the restoration will not occur.

9. Click **Restore**.

**Result:** The message **Did you turn off the Secure Perfect Services?** displays.

10. Click **Yes**.

**Result:** The restoration process begins. When restoration is complete, a dialog box displays a message, verifying the restoration of the chosen databases.

**Note:** The restoration message includes text advising that you must license your SP 6.1 system.

11. Click **OK**.

12. Exit **Restore**. The database restoration is complete.

## 7. Run Create SP Database



The database Server computer **MUST** be the computer on which you run the database conversion.

The 'Create SP Database' utility converts the SP3.1 database format to SP 6.1 database format.

**Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.

► **To run ‘Create SP Database’ on your SP 6.1 Server computer:**

1. Click **Programs, Secure Perfect**, then **Create SP Database**.

**Result:** The **Select Secure Perfect Edition** window displays.

2. Select **Professional Edition** and click **Next**.

**Result:** The **Create/Convert Database** window displays.

3. Enter your ‘sa’ password.

4. Click **Create/Convert Database**.

**Result:** A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect.

5. Click **Yes** to proceed.

**Result:** The **Convert Database** window displays.

6. Click **Convert Database**.

**Result:** A status bar displays the progress of the conversion. Upon completion, the message **Secure Perfect Database successfully converted!** displays.

7. Click **OK**.

## 8. License Your Secure Perfect 6.1 System

At this time, you must re-license your SP 6.1 system. Refer to [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual* for complete instructions to obtain and enter a license.

## 9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step moves the SP3.1 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

► **To restore designs, graphics, images, and signatures:**

1. Copy the designs from the SP3.1 computer into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*



2. Copy the graphics from the SP3.1 computer into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP3.1 computer into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP3.1 computer into the Signature folder on the SP 6.1 Server computer.

## 10. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [11. "Upgrade Client Computers" on page 18.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).
  - OR
  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**

5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**

6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.

7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 11. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 12. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 3.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## 13. Uninstall SP3.1 from the Original Computer

Once SP 6.1 is installed, configured, and running on the new computer, you may uninstall SP3.1 from the original computer.

### ► To uninstall SP3.1:

1. Click **Start, Settings, Control Panel**, then **Add/Remove Programs**.
2. Click **SP 3.1**. You may need to scroll down.
3. Click **Change/Remove**.

**Result:** The **Select Uninstall Method** window displays.

4. Select **Automatic** or **Custom** and click **Next**. If you select **Custom**, you will be prompted to select which files to delete.

**Result:** The **Perform Uninstall** window displays.

5. Click **Finish**.

**Result:** The SP3.1 uninstall begins. The **Remove Shared Component** window may display. Click **Yes to all** to continue.

6. Click **OK** to reboot the computer and complete the uninstall.

## 14. Uninstall Imaging Software from the Original Computer

Imaging may now be uninstalled from your original computer.

### ► To uninstall Imaging software:

1. Log in as the local administrator user.
2. Click **Start**, select **Settings**, **Control Panel**, and then **Add/Remove Programs**.
3. On the **Add/Remove Program Properties** page, select **Imaging Option 1.2**.
4. Click **Change/Remove**.
5. On the **Choose Setup Language** page, select **English**.
6. Click **OK**.

**Result:** The **Install Shield Wizard** progress screen displays.

7. You will receive a **Confirm File Deletion** popup. When asked, **Do you want to completely remove the selected application and all of its components?** click **OK**.
8. You will receive a **Maintenance Complete** screen, **Install Shield Wizard has finished performing maintenance operations on Imaging Option 1.2**. Select **Yes** to reboot your computer at this time. Click **Finish**.

**Result:** You are returned to the **Add/Remove Programs** screen. Your system reboots at this time.

## 15. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer

MSDE may now be uninstalled from your original computer.

### ► To uninstall MSDE software:

1. Log in as the local administrator user.

2. Refer to “Removing Microsoft SQL Server Desktop Engine (MSDE) - Secure Perfect 6.1 Professional” on page 15.9 of the *Secure Perfect 6.1 Installation Manual*.

## SP 4.0 to Secure Perfect 6.1

You may follow one of two scenarios when converting to SP 6.1:

**Note:** If your SP 6.1 Server computer will be the same computer as your existing Secure Perfect system, refer to Scenario 1. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.

**Scenario 1:** The SP 6.1 Server computer will be the **same** computer as the existing SP 4.0 computer.

**Scenario 1 begins on page 20.**

**Note:** If you plan on using a new or different computer for your SP 6.1 Server, refer to Scenario 2. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.

**Scenario 2:** The SP 6.1 Server computer will be a **different** computer than the existing SP 4.0 computer.

**Scenario 2 begins on page 26.**

### Scenario 1 - Same Computer

If your SP 6.1 Server computer will be the same computer as your existing SP 4.0 system, then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using the same computer:**

**Note:** To perform the upgrade, log in as a user with administrative rights, such as administrator.

“Before You Begin” on page 21

1. Note all Secure Perfect Operator Passwords (page 21)
2. Stop Secure Perfect Services on Secure Perfect 4.0 (page 21)
3. Back Up Secure Perfect Folder (page 22)
4. Back Up Secure Perfect 4.0 Databases (page 22)
5. Install Secure Perfect 6.1 and License Your System (page 23)
6. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 24)
7. Activate Enable Unique & Required Employee Number (page 24)

- 8. [Upgrade Client Computers \(page 25\)](#)
- 9. [Put Micros Online and Flash Application Code \(page 25\)](#)

## Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

### 2. Stop Secure Perfect Services on Secure Perfect 4.0

The Secure Perfect services run regardless of whether anyone is logged into Windows or SP 4.0 as long as the services are set for automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 4.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

#### ➤ To stop services on the SP 4.0 Server computer and all clients:

1. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

2. Locate the three Secure Perfect services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
- If the **Status** columns display **Started**, then the services are running and need to be stopped.

3. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

4. If the **Secure Perfect API** service is running, stop that service now.
5. Exit the **Services** application.

### 3. Back Up Secure Perfect Folder

Everything in your existing SP 4.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Images, Graphics, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

### 4. Back Up Secure Perfect 4.0 Databases

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

#### ► To back up your Secure Perfect databases:

1. Create a folder on your system where the backup files will be stored.
2. Click **Start, Programs, Secure Perfect**, then **Backup & Restore SP Databases**.

If this utility is not found in the **Start** menu, then go to the Secure Perfect directory and double-click the file: `Maintenance.exe`

**Result:** A **Maintenance** window displays.

3. Click **Backup**.

**Result:** A **Maintenance - [Backup]** destination window displays.

4. Accept the default **Login** of 'sa' and enter the **Password** for sa. If you have not already done so, we strongly suggest that you assign a unique password of your choice.
5. Navigate to the drive and directory folder on your system where the backup files will be stored. Double-click to open the **Destination** folder.
6. Holding down the left mouse button, drag and drop the destination folder onto each of the fields:
  - SecurePerfect
  - SecurePerfectArchive

- SecurePerfectHistory

**Result:** The .BAK files in each field will be named automatically to include the directory path, file name, date, and time.

7. If you choose not to back up a specific database, clear the check box at the end of that field. If the check box is selected but no destination is entered in the database field, backup of that database file will not occur.
8. Click **Backup**.  
  
**Result:** The backup process begins. When backup is complete, a dialog box displays a message verifying the successful backup of the chosen databases.
9. Click **OK**.
10. Exit the **Maintenance** window.

## 5. Install Secure Perfect 6.1 and License Your System

### ► To install the SP 6.1 application and license your system:

1. You MUST be logged in as the local administrator user. If not, log out and log back in as a user with these permissions.
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - SP 4.0 is automatically uninstalled.
  - The 'Create SP Database' utility automatically launches.

**NOTE DURING DATABASE CONVERSION:** *During a conversion, if a database already exists:*

*a. You must select the Secure Perfect edition that you want to install.*

*b. You are prompted for your SQL 'sa' password. Your previously assigned and encrypted SQL password displays. (If you purchased your Secure Perfect 6.1 system from GE, a temporary password of master was assigned for you.)*

*c. A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect. Click **Yes**, you want to convert.*

*d. A window displays your current Secure Perfect version. Click **Convert Database** to accept the required version and begin the database creation.*

- The license application automatically launches. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 6. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step restores the SP 4.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 4.0 backup source into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 4.0 backup source into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 4.0 backup source into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 4.0 backup source into the Signature folder on the SP 6.1 Server computer.

## 7. Activate Enable Unique & Required Employee Number

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [8. "Upgrade Client Computers" on page 25.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).

OR



- Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.  
**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**
  5. Click **Yes**.  
**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**
  6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
  7. Navigate to the Secure Perfect\Logs\DuplicateEmployeeNumbers.txt file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
  8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
  9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
  10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 8. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 9. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 4.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## Scenario 2 - Different Computer (Using Two Computers)

If your Server computer will be a different computer than your existing Secure Perfect computer, then follow the instructions in this section.

- This scenario follows a specific sequence of steps. **FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW.** Each one of these steps is explained in more detail in the sections that follow. To upgrade using a second computer:

“Before You Begin” on page 26

1. Note all Secure Perfect Operator Passwords (page 26)
2. Set Up Secure Perfect 6.1 Server (page 27)
3. Stop Secure Perfect Services on Secure Perfect 4.0 Server (page 27)
4. Back Up Secure Perfect Folder (page 28)
5. Back Up Secure Perfect 4.0 Databases on Secure Perfect 4.0 Server (page 28)
6. Restore Secure Perfect 4.0 Databases on Secure Perfect 6.1 Server (page 29)
7. Run Create SP Database (page 30)
8. License Your Secure Perfect 6.1 System (page 31)
9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 31)
10. Activate Enable Unique & Required Employee Number (page 31)
11. Upgrade Client Computers (page 33)
12. Put Micros Online and Flash Application Code (page 33)
13. Uninstall Secure Perfect 4.0 from the Original Computer (page 33)
14. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer (page 33)

### Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience*

*a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

## 2. Set Up Secure Perfect 6.1 Server

### ► To set up your SP 6.1 Server computer:

1. Since your new SP 6.1 database Server will be a different computer than your current SP 4.0 Server, you will need to configure the computer now. This includes setting up:
  - Hardware (such as the monitor, network board, and Digi board, if one is used)
  - Windows 2000 Professional or Windows XP Professional operating system
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - The 'Create SP Database' utility automatically launches.
  - The license application automatically launches. **DO NOT license at this time (as instructed in the sequence).** You will license your system after the database is converted.
3. Return to this point and continue.

## 3. Stop Secure Perfect Services on Secure Perfect 4.0 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or Secure Perfect as long as services are set to automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 4.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

### ► To stop services on the 4.0 Server computer and all clients:

1. Set all micros offline in Secure Perfect.
2. Shut down all client applications to ensure that any work in progress is saved.
3. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

4. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
5. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

6. If the **Secure Perfect API** service is running, stop that service now.
7. Exit the **Services** application.

#### 4. Back Up Secure Perfect Folder

Everything in your existing SP 4.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

#### 5. Back Up Secure Perfect 4.0 Databases on Secure Perfect 4.0 Server

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

➤ **To back up the database files:**

1. Create a folder on your system where the backup files will be stored.
2. Click **Start, Programs, Secure Perfect**, then **Backup & Restore SP Databases**.

If this utility is not found in the **Start** menu, then go to the Secure Perfect directory and double-click the file: `Maintenance.exe`

**Result:** A **Maintenance** window displays.

3. Click **Backup**.

**Result:** A **Maintenance - [Backup]** destination window displays.

4. Accept the default **Login** of **sa**. Enter the 'sa' password, if applicable. If you have not already done so, we strongly suggest that you assign a unique password of your choice.

5. Navigate to the drive and directory folder on your system where the backup files will be stored. Double-click to open the **Destination** folder.
6. Holding down the left mouse button, drag and drop the destination folder onto each of the fields:
  - SecurePerfect
  - SecurePerfectArchive
  - SecurePerfectHistory

**Result:** The .BAK files in each field will be named automatically to include the directory path, file name, date, and time.
7. If you choose not to back up a specific database, clear the check box at the end of that field. If the check box is selected but no destination is entered in the database field, backup of that database file will not occur.
8. Click **Backup**.

**Result:** The backup process begins. When backup is complete, a dialog box displays a message verifying the successful backup of the chosen databases.
9. Click **OK**.
10. Exit the **Maintenance** window.

## 6. Restore Secure Perfect 4.0 Databases on Secure Perfect 6.1 Server

These restore procedures are guidelines only.

***Note:** When you are restoring the SP 4.0 databases, you will replace the databases that were created during the SP 6.1 installation.*

### ► To restore the SP 4.0 databases backup:

1. Verify that SP 6.1 is installed on the destination computer.
2. Stop SP 6.1 services.
3. Click **Start, Programs, Secure Perfect**, and then **SP Maintenance Utility**.

**Result:** A **Maintenance** window displays.
4. Click **Restore**.

**Result:** A **Maintenance - [Restore]** destination window displays.
5. Enter your 'sa' password.
6. Navigate to the drive and directory folder on your system where the backup files are presently stored. Double-click to open the folder.

7. Holding down the left mouse button, drag and drop from the **Backup Source File** area onto each of the fields:
  - SecurePerfect
  - SecurePerfectArchive
  - SecurePerfectHistory
8. If you choose not to restore a specific database, clear the check box at the end of that field. If the check box is checked, but no destination is entered, the restoration will not occur.
9. Click **Restore**.

**Result:** The message **Did you turn off the Secure Perfect Services?** displays.

10. Click **Yes**.

**Result:** The restoration process begins. When restoration is complete, a dialog box displays a message, verifying the restoration of the chosen databases.

***Note:** The restoration message includes text advising that you must license your SP 6.1 system.*

11. Click **OK**.
12. Exit **Restore**. The database restoration is complete.

## 7. Run Create SP Database



*The database Server computer **MUST** be the computer on which you run the database conversion.*

The 'Create SP Database' utility converts the SP 4.0 database format to SP 6.1 database format.

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

### ► To run 'Create SP Database' on your SP 6.1 Server computer:

1. Click **Programs, Secure Perfect**, then **Create SP Database**.

**Result:** The **Select Secure Perfect Edition** window displays.

2. Select **Professional Edition** and click **Next**.

**Result:** The **Create/Convert Database** window displays.

3. Enter your 'sa' password.

4. Click **Create/Convert Database**.

**Result:** A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect.

5. Click **Yes** to proceed.

**Result:** The **Convert Database** window displays.

6. Click **Convert Database**.

**Result:** A status bar displays the progress of the conversion. Upon completion, the message **Secure Perfect Database successfully converted!** displays.

7. Click **OK**.

## 8. License Your Secure Perfect 6.1 System

At this time, you must license SP 6.1. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step moves the SP 4.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

**Note:** *If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 4.0 computer into the Designs folder on the SP 6.1 Server computer.

**Note:** *If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 4.0 computer into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 4.0 computer into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 4.0 computer into the Signature folder on the SP 6.1 Server computer.

## 10. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

➤ **Log in and open the Parameter Form to display the Settings tab:**

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [11. "Upgrade Client Computers" on page 33.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).
  - OR
  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**

5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**

6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the `.TXT` file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.



## 11. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 12. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 4.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## 13. Uninstall Secure Perfect 4.0 from the Original Computer

Once SP 6.1 is installed, configured, and running on the new computer, you may uninstall SP 4.0 from the original computer.

➤ **To uninstall SP 4.0:**

1. Click **Start, Settings, Control Panel**, then **Add/Remove Programs**.
2. Click **Secure Perfect 4.0**. You may need to scroll down.
3. Click **Remove**.

**Result:** The message **Are you sure you want to remove Secure Perfect 4.0 from your computer?** displays.

4. Click **Yes**.

**Result:** The SP 4.0 application will be removed.

## 14. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer

MSDE may now be uninstalled from your original computer.

➤ **To uninstall MSDE software:**

1. Log in as the local administrator user.
2. Refer to [“Removing Microsoft SQL Server Desktop Engine \(MSDE\) - Secure Perfect 6.1 Professional” on page 15.9](#) of the *Secure Perfect 6.1 Installation Manual*.

## SP 5.0 to Secure Perfect 6.1

You may follow one of two scenarios when converting to SP 6.1:

**Note:** *If your SP 6.1 Server computer will be the same computer as your existing Secure Perfect system, refer to Scenario 1. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.*

**Scenario 1:** The SP 6.1 Server computer will be the **same** as the existing SP 5.0 computer.

**Scenario 1 begins on [page 34](#).**

**Note:** *If you plan on using a new or different computer for your SP 6.1 Server, refer to Scenario 2. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.*

**Scenario 2:** The SP 6.1 Server computer will be a **different** computer than the existing SP 5.0 computer.

**Scenario 2 begins on [page 40](#).**

### Scenario 1 - Same Computer

If your SP 6.1 Server computer will be the same computer as your existing SP 5.0 system, then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using the same computer:**

**Note:** *To perform the upgrade, log in as a user with administrative rights, such as administrator.*

[“Before You Begin” on page 35](#)

1. [Note all Secure Perfect Operator Passwords \(page 35\)](#)
2. [Stop Secure Perfect Services on Secure Perfect 5.0 \(page 35\)](#)
3. [Back Up Secure Perfect Folder \(page 36\)](#)
4. [Back Up Secure Perfect 5.0 Databases \(page 36\)](#)
5. [Install Secure Perfect 6.1 and License Your System \(page 37\)](#)
6. [Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server \(page 37\)](#)
7. [Activate Enable Unique & Required Employee Number \(page 38\)](#)
8. [Upgrade Client Computers \(page 39\)](#)
9. [Put Micros Online and Flash Application Code \(page 39\)](#)

## Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

### 2. Stop Secure Perfect Services on Secure Perfect 5.0

The Secure Perfect services run regardless of whether anyone is logged into Windows or SP 5.0 as long as the services are set for automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 5.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

#### ► To stop services on the SP 5.0 Server computer and all clients:

1. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

2. Locate the three Secure Perfect services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
- If the **Status** columns display **Started**, then the services are running and need to be stopped.

3. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

4. If the **Secure Perfect API** service is running, stop that service now.
5. Exit the **Services** application.

### 3. Back Up Secure Perfect Folder

Everything in your existing SP 5.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Images, Graphics, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

### 4. Back Up Secure Perfect 5.0 Databases

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

► **To back up your Secure Perfect databases:**

1. Create a folder on your system where the backup files will be stored.
2. Click **Start, Programs, Secure Perfect**, then **Backup & Restore SP Databases**.

If this utility is not found in the **Start** menu, then go to the Secure Perfect directory and double-click the file: `Maintenance.exe`

**Result:** A **Maintenance** window displays.

3. Click **Backup**.

**Result:** A **Maintenance - [Backup]** destination window displays.

4. Accept the default **Login** of 'sa' and enter the **Password** for sa. If you have not already done so, we strongly suggest that you assign a unique password of your choice.
5. Navigate to the drive and directory folder on your system where the backup files will be stored. Double-click to open the **Destination** folder.
6. Holding down the left mouse button, drag and drop the destination folder onto each of the fields:
  - SecurePerfect
  - SecurePerfectArchive
  - SecurePerfectHistory

**Result:** The .BAK files in each field will be named automatically to include the directory path, file name, date, and time.

7. If you choose not to back up a specific database, clear the check box at the end of that field. If the check box is selected but no destination is entered in the database field, backup of that database file will not occur.

8. Click **Backup**.

**Result:** The backup process begins. When backup is complete, a dialog box displays a message verifying the successful backup of the chosen databases.

9. Click **OK**.
10. Exit the **Maintenance** window.

## 5. Install Secure Perfect 6.1 and License Your System

### ► To install the SP 6.1 application and license your system:

1. You **MUST** be logged in as the local administrator user. If not, log out and log back in as a user with these permissions.
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - SP 5.0 is automatically uninstalled.
  - The 'Create SP Database' utility automatically launches.

**NOTE DURING DATABASE CONVERSION:** *During a conversion, if a database already exists:*

*a. You must select the Secure Perfect edition that you want to install.*

*b. You are prompted for your SQL 'sa' password. Your previously assigned and encrypted SQL password displays. (If you purchased your Secure Perfect 6.1 system from GE, a temporary password of master was assigned for you.)*

*c. A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect. Click **Yes**, you want to convert.*

*d. A window displays your current Secure Perfect version. Click **Convert Database** to accept the required version and begin the database creation.*

- The license application automatically launches. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 6. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step restores the SP 5.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

➤ **To restore designs, graphics, images, and signatures:**

1. Copy the designs from the SP 5.0 backup source into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 5.0 backup source into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 5.0 backup source into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 5.0 backup source into the Signature folder on the SP 6.1 Server computer.

## **7. Activate *Enable Unique & Required Employee Number***

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

➤ **Log in and open the Parameter Form to display the Settings tab:**

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [8. "Upgrade Client Computers" on page 39.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).
  - OR
  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**

5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**

6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 8. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 9. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 4.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## Scenario 2 - Different Computer (Using Two Computers)

If your Server computer will be a different computer than your existing Secure Perfect computer, then follow the instructions in this section.

- This scenario follows a specific sequence of steps. **FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW.** Each one of these steps is explained in more detail in the sections that follow. To upgrade using a second computer:

“Before You Begin” on page 40

1. Note all Secure Perfect Operator Passwords (page 40)
2. Set Up Secure Perfect 6.1 Server (page 41)
3. Stop Secure Perfect Services on Secure Perfect 5.0 Server (page 41)
4. Back Up Secure Perfect Folder (page 42)
5. Back Up Secure Perfect 5.0 Databases on Secure Perfect 5.0 Server (page 42)
6. Restore Secure Perfect 5.0 Databases on Secure Perfect 6.1 Server (page 43)
7. Run Create SP Database (page 44)
8. License Your Secure Perfect 6.1 System (page 45)
9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 45)
10. Activate Enable Unique & Required Employee Number (page 45)
11. Upgrade Client Computers (page 46)
12. Put Micros Online and Flash Application Code (page 47)
13. Uninstall Secure Perfect 5.0 from the Original Computer (page 47)
14. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer (page 47)

### Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.



## 2. Set Up Secure Perfect 6.1 Server

### ► To set up your SP 6.1 Server computer:

1. Since your new SP 6.1 database Server will be a different computer than your current SP 5.0 Server, you will need to configure the computer now. This includes setting up:
  - Hardware (such as the monitor, network board, and Digi board, if one is used)
  - Windows 2000 Professional or Windows XP Professional operating system
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - The 'Create SP Database' utility automatically launches.
  - The license application automatically launches. **DO NOT license at this time (as instructed in the sequence).** You will license your system after the database is converted.
3. Return to this point and continue.

## 3. Stop Secure Perfect Services on Secure Perfect 5.0 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or Secure Perfect as long as services are set to automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 5.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

### ► To stop services on the 5.0 Server computer and all clients:

1. Set all micros offline in Secure Perfect.
2. Shut down all client applications to ensure that any work in progress is saved.
3. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

4. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
5. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.  
**Result:** The **Status** columns should now be blank.
  6. If the **Secure Perfect API** service is running, stop that service now.
  7. Exit the **Services** application.

#### 4. Back Up Secure Perfect Folder

Everything in your existing SP 5.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

#### 5. Back Up Secure Perfect 5.0 Databases on Secure Perfect 5.0 Server

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

##### ► To back up the database files:

1. Create a folder on your system where the backup files will be stored.
2. Click **Start, Programs, Secure Perfect**, then **Backup & Restore SP Databases**.  
  
If this utility is not found in the **Start** menu, then go to the Secure Perfect directory and double-click the file: `Maintenance.exe`  
**Result:** A **Maintenance** window displays.
3. Click **Backup**.  
**Result:** A **Maintenance - [Backup]** destination window displays.
4. Accept the default **Login** of **sa**. Enter the 'sa' password, if applicable. If you have not already done so, we strongly suggest that you assign a unique password of your choice.
5. Navigate to the drive and directory folder on your system where the backup files will be stored. Double-click to open the **Destination** folder.

6. Holding down the left mouse button, drag and drop the destination folder onto each of the fields:

- SecurePerfect
- SecurePerfectArchive
- SecurePerfectHistory

**Result:** The .BAK files in each field will be named automatically to include the directory path, file name, date, and time.

7. If you choose not to back up a specific database, clear the check box at the end of that field. If the check box is selected but no destination is entered in the database field, backup of that database file will not occur.

8. Click **Backup**.

**Result:** The backup process begins. When backup is complete, a dialog box displays a message verifying the successful backup of the chosen databases.

9. Click **OK**.

10. Exit the **Maintenance** window.

## 6. Restore Secure Perfect 5.0 Databases on Secure Perfect 6.1 Server

These restore procedures are guidelines only.

***Note:** When you are restoring the SP 5.0 databases, you will replace the databases that were created during the SP 6.1 installation.*

### ► To restore the SP 5.0 databases backup:

1. Verify that SP 6.1 is installed on the destination computer.
2. Stop SP 6.1 services.
3. Click **Start, Programs, Secure Perfect**, and then **SP Maintenance Utility**.

**Result:** A **Maintenance** window displays.

4. Click **Restore**.

**Result:** A **Maintenance - [Restore]** destination window displays.

5. Enter your 'sa' password.
6. Navigate to the drive and directory folder on your system where the backup files are presently stored. Double-click to open the folder.
7. Holding down the left mouse button, drag and drop from the **Backup Source File** area onto each of the fields:
  - SecurePerfect

- SecurePerfectArchive
  - SecurePerfectHistory
8. If you choose not to restore a specific database, clear the check box at the end of that field. If the check box is checked, but no destination is entered, the restoration will not occur.
  9. Click **Restore**.  
**Result:** The message **Did you turn off the Secure Perfect Services?** displays.
  10. Click **Yes**.  
**Result:** The restoration process begins. When restoration is complete, a dialog box displays a message, verifying the restoration of the chosen databases.  
***Note:** The restoration message includes text advising that you must license your SP 6.1 system.*
  11. Click **OK**.
  12. Exit **Restore**. The database restoration is complete.

## 7. Run Create SP Database



*The database Server computer **MUST** be the computer on which you run the database conversion.*

The 'Create SP Database' utility converts the SP 5.0 database format to SP 6.1 database format.

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

### ► To run 'Create SP Database' on your SP 6.1 Server computer:

1. Click **Programs, Secure Perfect, then Create SP Database**.  
**Result:** The **Select Secure Perfect Edition** window displays.
2. Select **Professional Edition** and click **Next**.  
**Result:** The **Create/Convert Database** window displays.
3. Enter your 'sa' password.
4. Click **Create/Convert Database**.  
**Result:** A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect.
5. Click **Yes** to proceed.  
**Result:** The **Convert Database** window displays.

6. Click **Convert Database**.

**Result:** A status bar displays the progress of the conversion. Upon completion, the message **Secure Perfect Database successfully converted!** displays.

7. Click **OK**.

## 8. License Your Secure Perfect 6.1 System

At this time, you must license SP 6.1. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step moves the SP 5.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ➤ To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 5.0 computer into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 5.0 computer into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 5.0 computer into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 5.0 computer into the Signature folder on the SP 6.1 Server computer.

## 10. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ➤ Log in and open the Parameter Form to display the Settings tab:

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [11. "Upgrade Client Computers" on page 46](#).

2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).
  - OR
  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**

5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**

6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 11. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 12. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 4.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## 13. Uninstall Secure Perfect 5.0 from the Original Computer

Once SP 6.1 is installed, configured, and running on the new computer, you may uninstall SP 5.0 from the original computer.

➤ **To uninstall SP 5.0:**

1. Click **Start, Settings, Control Panel**, then **Add/Remove Programs**.
2. Click **Secure Perfect 5.0**. You may need to scroll down.
3. Click **Remove**.

**Result:** The message **Are you sure you want to remove Secure Perfect 5.0 from your computer?** displays.

4. Click **Yes**.

**Result:** The SP 5.0 application will be removed.

## 14. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer

MSDE may now be uninstalled from your original computer.

➤ **To uninstall MSDE software:**

1. Log in as the local administrator user.
2. Refer to [“Removing Microsoft SQL Server Desktop Engine \(MSDE\) - Secure Perfect 6.1 Professional” on page 15.9](#) of the *Secure Perfect 6.1 Installation Manual*.

## Upgrading Enterprise Servers

The Secure Perfect 6.1 Enterprise Server computer runs on Windows 2000 Server or Windows 2003 Server Standard operating system. Client computers run on Windows 2000 Professional, Windows XP Professional, Windows 2000 Server or Windows 2003 Server operating systems.

After you have upgraded the Server computer, you will need to upgrade your client computers. This will be discussed following the Server upgrade, in [“Upgrading Client Computers” on page 112](#).

Currently, upgrades from three previous versions are supported. Choose yours from the list below and refer to the appropriate page.

- [“SP3.1 to Secure Perfect 6.1” on page 48](#)
- [“SP 4.0 to Secure Perfect 6.1” on page 68](#)
- [“SP 5.0 to Secure Perfect 6.1” on page 87](#)

### SP3.1 to Secure Perfect 6.1

You may follow one of two scenarios when converting to SP 6.1:

***Note:** If your SP 6.1 Server computer will be the same computer as your existing Secure Perfect system, refer to Scenario 1. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.*

**Scenario 1:** The SP 6.1 Server computer will be the **same** computer as the existing SP3.1 computer.

**Scenario 1 begins on [page 48](#).**

***Note:** If you plan on using a new or different computer for your SP 6.1 Server, refer to Scenario 2. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.*

**Scenario 2:** The SP 6.1 Server computer will be a **different** computer than the existing SP3.1 computer.

**Scenario 2 begins on [page 57](#).**

#### Scenario 1 - Same Computer

If your SP 6.1 Enterprise Server computer will be the same computer as your existing SP3.1 system, then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using the same computer:**

[“Before You Begin” on page 49](#)

1. [Note all Secure Perfect Operator Passwords \(page 49\)](#)



2. Stop Secure Perfect Services on SP3.1 Server (page 49)
3. Back Up Secure Perfect Folder (page 50)
4. Back Up SP3.1 Databases Using Microsoft SQL Server Enterprise Manager (page 50)
5. OPTIONAL: Run Database Maintenance Plan Wizard (page 52)
6. Back Up Clean SP3.1 Databases (page 53)
7. Uninstall Imaging Software (page 53)
8. Install Secure Perfect 6.1 and License Your System (page 53)
9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 54)
10. Activate Enable Unique & Required Employee Number (page 55)
11. Upgrade Client Computers (page 56)
12. Put Micros Online and Flash Micros with Application Code (page 56)

## Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

## 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

## 2. Stop Secure Perfect Services on SP3.1 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or SP3.1 as long as the services are set for automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP3.1 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

➤ **To stop services on the 3.1 Server computer and all clients:**

1. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

2. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
3. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

4. Exit from the **Services** application.

### 3. Back Up Secure Perfect Folder

Everything in your existing SP3.1 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility or Microsoft Enterprise Manager which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

### 4. Back Up SP3.1 Databases Using Microsoft SQL Server Enterprise Manager

Back up the SecurePerfect, SecurePerfectArchive, and SecurePerfectHistory databases on your SP3.1 Server computer.

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

If you are:

- Not familiar with Microsoft SQL Enterprise Manager, use the instructions below.

- Familiar with Microsoft SQL Enterprise Manager, back up the three databases and then continue with 5. “OPTIONAL: Run Database Maintenance Plan Wizard” on page 52.

► **To back up your Secure Perfect databases using Microsoft SQL Enterprise Manager:**

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.

6. Right-click **SecurePerfect**.

**Result:** The **SQL Server Enterprise Manager - Secure Perfect Shortcut** menu displays.

7. Click **All Tasks**, then **Backup Database**.

**Result:** The **SQL Server Backup** dialog box displays.

8. In the **Name** field, you can keep the default or choose a different name.
9. Select the **Database - complete** option button.
10. Under the **Destination**, you can choose either a file name or a device, such as a tape. (The first time you perform this function, you will be required to create the device by clicking **Add**.) We recommend that you select the device or a file on a network.
11. You may select either **Overwrite existing media** or **Append to media**. The latter option is useful when using a tape that can hold a large quantity of data.
12. You can schedule the backup by selecting the **Schedule** check box. The button with the three dots is now enabled, which allows you to edit the schedule. We recommend that you refer to the SQL Online Help for more information.
13. Click **OK** to start the backup.

**Result:** A **Backup Progress** dialog box will display.

14. When the **Backup operation has been completed successfully** screen displays, click **OK**.
15. Repeat steps 6 through 14 for your other two databases: SecurePerfectHistory and SecurePerfectArchive.
16. Exit the Microsoft SQL Server Enterprise Manager application.

## 5. OPTIONAL: Run *Database Maintenance Plan Wizard*

If the integrity of your SP3.1 Server computer database becomes questionable, you can run the **Database Maintenance Plan Wizard** which will attempt to correct the suspect data and shrink the size of your database.

► **To run the Database Maintenance Plan Wizard:**

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Navigate to each Secure Perfect database folder.

7. Select a database, then right-click.
8. Select **All Tasks** on the shortcut menu, then **Maintenance Plan**.

**Result:** The **Database Maintenance Plan Wizard** displays.

9. Click **Next**.
10. Select specific databases from the list on the **Select Databases for which to create the maintenance plan**. Click **Next**.
11. Select **Update Data Optimization Information** options. Click **Next**.
12. Select **Check database integrity options** choices. Click **Next**.
13. Select the where and when options on the **Specify the Database Backup Plan** screen. Click **Next**.
14. Select the where and when options on the **Specify Backup Disk Directory**. Click **Next**.
15. Select the where and when options on the **Specify the Transaction Log Backup Plan** screen. Click **Next**.
16. Select the where and when options on the **Reports to Generate** screen. Click **Next**.
17. Specify how you want to store the maintenance plan records on the **Maintenance Plan History** screen. Click **Next**.
18. When **Completing the Database Maintenance Plan Wizard** screen displays, review your selections by scrolling through the list. Click **Finish** if you are satisfied with the selections you have made.
19. Exit the application.

## 6. Back Up Clean SP3.1 Databases

If you elected to run the database maintenance plan wizard, a backup of the cleaned database files would be appropriate at this time. Refer to instructions in step 4. [“Back Up SP3.1 Databases Using Microsoft SQL Server Enterprise Manager” on page 50.](#)

## 7. Uninstall Imaging Software

➤ **To uninstall Imaging software:**

1. Click **Start**, select **Settings, Control Panel**, and then **Add/Remove Programs**.
2. On the **Add/Remove Program Properties** page, select **Imaging Option 1.2**.
3. Click **Change/Remove**.
4. On the **Choose Setup Language** page, select **English**.
5. Click **OK**.

**Result:** The **InstallShield Wizard** progress screen displays.

6. You will receive a **Confirm File Deletion** popup. When asked, **Do you want to completely remove the selected application and all of its components?** click **OK**.

If you receive a **Shared File Detected** popup, click **Yes to All** to remove the files.

7. You will receive a **Maintenance Complete** screen, **Install Shield Wizard has finished performing maintenance operations on Imaging Option 1.2**. Select **Yes** to reboot your computer at this time. Click **Finish**.

**Result:** You are returned to the **Add/Remove Programs** screen. Your system reboots at this time.

## 8. Install Secure Perfect 6.1 and License Your System

➤ **To install the SP 6.1 application:**

1. You **MUST** be logged in as the local administrator user. If not, log out and log back in as a user with these permissions.
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - Secure Perfect 3.1 is automatically uninstalled. (See steps below if the uninstall does not proceed.)
  - The ‘Create SP Database’ utility automatically launches.

**NOTE DURING DATABASE CONVERSION:** *During a conversion, if a database already exists:*

- a. You must select the Secure Perfect edition that you want to install.*
  - b. You are prompted for your SQL 'sa' password. Your previously assigned and encrypted SQL password displays. (If you purchased your Secure Perfect 6.1 system from GE, a temporary password of master was assigned for you.)*
  - c. A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect. Click **Yes**, you want to convert.*
  - d. A window displays your current Secure Perfect version. Click **Convert Database** to accept the required version and begin the database creation.*
- The license application automatically launches. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

➤ **If the uninstall does not proceed (hangs), follow the instructions below:**

1. Click **Ctrl-Alt-Delete**.
2. The **Windows Security** dialog displays.
3. Click **Task Manager**.
4. At the **Task Manager** window, **Install** will display a status of **Not Responding**.
5. Select the line **Uninstall** and click **End Task**.
6. At the next dialog, click **End Task** again.
7. Once the steps above are completed, follow the instructions in the sections of the *Secure Perfect 6.1 Installation Manual* listed below:
  - [“Verifying and Cleaning Up after an Uninstall” on page 15.4](#)
  - [“Verifying Secure Perfect Uninstalled Cleanly” on page 15.4](#)
  - [“Deleting Subkeys from the Registry” on page 15.4](#)
  - [“Windows 2000 Registry Permission Validation” on page 15.6](#) (if applicable)

## **9. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server**

This step restores the SP3.1 designs, graphics, images, and signatures to the SP 6.1 Server computer.

**Note:** *If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

➤ **To restore designs, graphics, images, and signatures:**

1. Copy the designs from the SP3.1 backup source into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP3.1 backup source into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP3.1 backup source into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP3.1 backup source into the Signature folder on the SP 6.1 Server computer.

## 10. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

➤ **Log in and open the Parameter Form to display the Settings tab:**

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [11. "Upgrade Client Computers" on page 56.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).

**OR**

  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**

5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**

6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 11. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 12. Put Micros Online and Flash Micros with Application Code

SP 6.1 software will communicate with micros flashed with 3.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.



## ***Scenario 2 - Different Computer (Using Two Computers)***

**If your Server computer will be a different computer than your existing Secure Perfect computer, then follow the instructions in this section.**

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using a second computer:**

“Before You Begin” on page 57

1. Note all Secure Perfect Operator Passwords (page 58)
2. Set Up Secure Perfect 6.1 Server (page 58)
3. Stop Secure Perfect Services on SP3.1 Server (page 58)
4. Back Up Secure Perfect Folder (page 59)
5. OPTIONAL: Run Database Maintenance Plan Wizard (page 59)
6. Back Up SP3.1 Databases Using Microsoft SQL Server Enterprise Manager (page 60)
7. Restore SP3.1 Databases to Secure Perfect 6.1 Server (page 61)
8. Run Create SP Database (page 64)
9. License Your Secure Perfect 6.1 System (page 65)
10. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 65)
11. Activate Enable Unique & Required Employee Number (page 65)
12. Upgrade Client Computers (page 66)
13. Put Micros Online and Flash Application Code (page 66)
14. Uninstall SP3.1 from the Original Computer (page 67)
15. Uninstall Imaging Software from the Original Computer (page 67)
16. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer (page 68)

### **Before You Begin**

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

## 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

## 2. Set Up Secure Perfect 6.1 Server

### ► To set up your SP 6.1 Server computer:

1. Since your new SP 6.1 database Server will be a different computer than your current SP3.1 Server, you will need to configure the computer now. This includes setting up:
  - Hardware (such as the monitor, network board, and Digi board, if one is used)
  - Software
    - Windows 2000 or Windows 2003 Server operating system
    - SQL Server 2000 with appropriate Service Pack (At this time, Service Pack 3a is required and auto installs with SP 6.1.)
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - The 'Create SP Database' utility automatically launches.
  - The license application automatically launches. **DO NOT license at this time (as instructed in the sequence).** You will license your system after the database is converted.
3. Return to this point and continue.

## 3. Stop Secure Perfect Services on SP3.1 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or Secure Perfect as long as services are set to Automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP3.1 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

➤ **To stop the Secure Perfect services on the 3.1 Server computer and all clients:**

1. Set all micros offline in Secure Perfect.
2. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

3. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
4. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

5. Exit from the **Services** application.

#### 4. Back Up Secure Perfect Folder

Everything in your existing SP3.1 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility or Microsoft Enterprise Manager which will be explained in a following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

#### 5. OPTIONAL: Run Database Maintenance Plan Wizard

If the integrity of your SP3.1 Server computer database becomes questionable, you can run the **Database Maintenance Plan Wizard** which will attempt to correct the suspect data and shrink the size of your database.

➤ **To run the Database Maintenance Plan Wizard:**

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.

3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Navigate to each Secure Perfect database folder.
7. Select a database, then right-click.
8. Select **All Tasks** on the shortcut menu, then **Maintenance Plan**.

**Result:** The **Database Maintenance Plan Wizard** displays.

9. Select all or specific databases from the list on the **Select Databases for which to create the maintenance plan** screen. Click **Next**.
10. Select **Update Data Optimization Information** options. Click **Next**.
11. Select **Database Integrity Check** options. Click **Next**.
12. Select the where and when options on the **Specify the Database Backup Plan** screen. Click **Next**.
13. Select the where and when options on the **Specify Backup Disk Directory**. Click **Next**.
14. Select the where and when options on the **Specify the Transaction Log Backup Plan** screen. Click **Next**.
15. Select the where and when options on the **Reports to Generate** screen. Click **Next**.
16. Specify how you want to store the maintenance plan records on the **Maintenance Plan History** screen. Click **Next**.
17. When **Completing the Database Maintenance Plan Wizard** screen displays, scroll and review your selections. Click **Finish** if you are satisfied with the selections you have made.

## 6. Back Up SP3.1 Databases Using Microsoft SQL Server Enterprise Manager

Back up the SecurePerfect, SecurePerfectArchive, and SecurePerfectHistory databases on your SP3.1 Server computer. These databases will be restored onto the new SP 6.1 Server computer.

**Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.

If you are:

- Not familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- Familiar with Microsoft SQL Enterprise Manager, back up the three databases and then continue with 7. “Restore SP3.1 Databases to Secure Perfect 6.1 Server” on page 61.

► **To back up your Secure Perfect databases using Microsoft SQL Enterprise Manager:**

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Right-click **SecurePerfect**.

**Result:** The **SQL Server Enterprise Manager - Secure Perfect Shortcut** menu displays.

7. Click **All Tasks**, then **Backup Database**.

**Result:** The **SQL Server Backup** dialog box displays.

8. In the **Name** field, you can keep the default or choose a different name.
9. Select the **Database - complete** option button.
10. Under the **Destination**, you can choose either a file name or a device, such as a tape. (The first time you perform this function, you will be required to create the device by clicking **Add**.) We recommend that you select the device or a file on a network.
11. You may select either **Overwrite existing media** or **Append to media**. The latter option is useful when using a tape that can hold a large quantity of data.
12. You can schedule the backup by selecting the **Schedule** check box. The button with the three dots is now enabled, which allows you to edit the schedule. We recommend that you refer to the SQL Online Help for more information.
13. Click **OK** to start the backup.

**Result:** A **Backup Progress** dialog box will display.

14. When the **Backup operation has been completed successfully** screen displays, click **OK**.
15. Repeat steps 6 through 14 for your other two databases: SecurePerfectHistory and SecurePerfectArchive.
16. Exit the Microsoft SQL Server Enterprise Manager application.

## 7. Restore SP3.1 Databases to Secure Perfect 6.1 Server

These restore procedures are guidelines only.

**Note:** When you are restoring the SP3.1 databases, you will replace the databases that were created during the SP 6.1 installation.

If you are:

- NOT familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- FAMILIAR with Microsoft SQL Enterprise Manager, restore the three databases and then proceed with 8. “Run Create SP Database” on page 64.

➤ **To restore the SP3.1 databases backup:**

1. Verify that all SP 6.1 network clients other than the Enterprise Server computer have logged out and that the SP 6.1 services are shut down.
2. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
3. Navigate to <Server Name>SPSQL where <Server Name> is the name of the server computer.
4. Open the Databases folder for your Secure Perfect server.

The database was backed up using one of two options: disk or tape. Refer to the list below for the appropriate restore procedures.

- From disk, see page 62.
- From tape, see page 63.

## Restoring from Disk

If the databases were backed up onto disk, follow the procedures below.

If the databases were backed up onto tape, refer to [page 63](#).

➤ **To restore the SP3.1 databases backup from disk:**

1. Select **SecurePerfect**.
2. From the **Tools** menu, select **Restore Database**.  
**Result:** The **Restore database** window displays.
3. In the **Restore as database** field, verify that **SecurePerfect** displays.
4. In the **Restore** category, select **From device**.
5. On the **Parameters** pane, verify that **Restore backup set** and **Database - complete** are selected.
6. Click **Select Devices**.

**Result:** The **Choose Restore Devices** window displays.

7. In the **Restore from** area, select **Disk** and click **Add**.

**Result:** The **Choose Restore Destination** window displays.

8. Select **File name**, click **Browse**, and navigate to where the backup file is stored. When the path and file name display in the **File name** field, click **OK** in the **Backup Device Location** window.
9. Click **OK** to close the **Choose Restore Destination** window.
10. Click **OK** to close the **Choose Restore Devices** window.
11. Click **Options**.
12. Check **Force restore over existing database**.
13. In the **Move to physical file name** field, confirm that the path to the Secure Perfect databases displays. If the correct path does not display, enter it by typing over the existing path.
14. Click **OK**.
15. Click **OK** to begin the restore process.

**Result:** The **Restore Progress** dialog displays. Upon completion, you should receive a message stating that the restore was successful. Depending on the size of your database, this can take from a few minutes to a few hours.

16. Repeat steps 1 through 15 for the SecurePerfectArchive and SecurePerfectHistory databases.
17. Exit SQL Server Enterprise Manager.

At this time, go to 8. [“Run Create SP Database” on page 64](#) to continue with the upgrade.

## Restoring from Tape

If the databases were backed up onto tape, follow the procedures below.

### ► To restore the SP3.1 databases from tape:

1. Select **SecurePerfect**.
2. From the **Tools** menu, select **Restore Database**.  
**Result:** The **Restore database** window displays.
3. In the **Restore as database** field, verify that **SecurePerfect** displays.
4. At the **Restore:** category, select the **From device** option button.
5. In the **Parameters Devices** area, click **Select Devices**.
6. In the window that displays, select **Tape**, then click **Add**.  
**Result:** The tape drive displays as the default in the **Choose Restore Destination** dialog box.
7. Click **OK** two times.

8. On the **Restore Database** window, **Parameters** pane, verify that **Restore backup set** and **Database - complete** are selected. Click **OK**.

***Note:** If you get an error message or if you have multiple files to restore, click **View Contents**. A list of files will display with the contents of the tape. Select which file or files you want to restore from the list.*

**Result:** An **SQL Server Enterprise Manager** window will display stating, **Restore of database 'SecurePerfect' completed successfully**. Depending on the size of your database, this can take from a few minutes to a few hours.

9. Repeat steps 1 through 8 for the SecurePerfectArchive and SecurePerfectHistory databases.
10. Exit SQL Server Enterprise Manager.

## 8. Run Create SP Database



*The database Server computer **MUST** be the computer on which you run the database conversion.*

The 'Create SP Database' utility converts the SP3.1 database format to SP 6.1 database format.

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

### ► To run 'Create SP Database' on your SP 6.1 Server computer:

1. Click **Programs, Secure Perfect, then Create SP Database**.

**Result:** The **Select Secure Perfect Edition** window displays.

2. Select **Enterprise Edition** and click **Next**.

**Result:** The **Create/Convert Database** window displays.

3. Enter your sa password.

4. Click **Create/Convert Database**.

**Result:** A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect.

5. Click **Yes** to proceed.

**Result:** The **Convert Database** window displays.

6. Click **Convert Database**.

**Result:** A status bar displays the progress of the conversion. Upon completion, the message **Secure Perfect Database successfully converted** displays.

7. Click **OK**.



## 9. License Your Secure Perfect 6.1 System

At this time, you must license SP 6.1. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 10. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step moves the SP3.1 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP3.1 computer into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP3.1 computer into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP3.1 computer into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP3.1 computer into the Signature folder on the SP 6.1 Server computer.

## 11. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [12. "Upgrade Client Computers" on page 66](#).
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.

3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).

OR

  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**
5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**
6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 12. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 13. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 3.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the

appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## 14. Uninstall SP3.1 from the Original Computer

Once SP 6.1 is installed, configured, and running on the new computer, you may uninstall SP3.1 from the original computer.

### ► To uninstall SP3.1:

1. Click **Start, Settings, Control Panel**, then **Add/Remove Programs**.
2. Click **SP 3.1**. You may need to scroll down.
3. Click **Change/Remove**.

**Result:** The **Select Uninstall Method** window displays.

4. Select **Automatic** or **Custom** and click **Next**. If you select **Custom**, you will be prompted to select which files to delete.

**Result:** The **Perform Uninstall** window displays.

5. Click **Finish**.

**Result:** The SP3.1 uninstall begins. The **Remove Shared Component** window may display. Click **Yes to all** to continue.

6. Click **OK** to reboot the computer and complete the uninstall.

## 15. Uninstall Imaging Software from the Original Computer

Imaging may now be uninstalled from your original computer.

### ► To uninstall Imaging software:

1. Log in as the local administrator user.
2. Click **Start**, select **Settings, Control Panel**, and then **Add/Remove Programs**.
3. On the **Add/Remove Program Properties** page, select **Imaging Option 1.2**.
4. Click **Change/Remove**.
5. On the **Choose Setup Language** page, select **English**.

6. Click **OK**.

**Result:** The **Install Shield Wizard** progress screen displays.

7. You will receive a **Confirm File Deletion** popup. When asked, **Do you want to completely remove the selected application and all of its components?** click **OK**.
8. You will receive a **Maintenance Complete** screen, **Install Shield Wizard has finished performing maintenance operations on Imaging Option 1.2**. Select **Yes** to reboot your computer at this time. Click **Finish**.

**Result:** You are returned to the **Add/Remove Programs** screen. Your system reboots at this time.

## 16. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer

MSDE may now be uninstalled from your original computer.

### ► To uninstall MSDE software:

1. Log in as the local administrator user.
2. Refer to [“Removing Microsoft SQL Server Desktop Engine \(MSDE\) - Secure Perfect 6.1 Professional” on page 15.9](#) of the *Secure Perfect 6.1 Installation Manual*.

## SP 4.0 to Secure Perfect 6.1

Follow one of two scenarios when converting to SP 6.1:

**Note:** If your SP 6.1 Server computer will be the same computer as your existing Secure Perfect system, refer to Scenario 1. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.

**Scenario 1:** The SP 6.1 Server computer will be the same as the existing SP 4.0 computer.

**Scenario 1 begins on [page 69](#).**

**Note:** If you plan on using a new or different computer for your SP 6.1 Server, refer to Scenario 2. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.

**Scenario 2:** The SP 6.1 Server computer will be a different computer than the existing SP 4.0 computer.

**Scenario 2 begins on [page 76](#).**

## Scenario 1 - Same Computer

If your SP 6.1 Enterprise Server computer will be the same computer as your existing SP 4.0 system, then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using the same computer:**

“Before You Begin” on page 69

1. Note all Secure Perfect Operator Passwords (page 69)
2. Stop Secure Perfect Services on Secure Perfect 4.0 Server (page 70)
3. Back Up Secure Perfect Folder (page 70)
4. Back Up Secure Perfect 4.0 Databases (page 71)
5. OPTIONAL: Run Database Maintenance Plan Wizard (page 72)
6. Back Up Clean Secure Perfect 4.0 Databases (page 73)
7. Install Secure Perfect 6.1 and License Your System (page 73)
8. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 74)
9. Activate Enable Unique & Required Employee Number (page 74)
10. Upgrade Client Computers (page 75)
11. Put Micros Online and Flash Micros with Application Code (page 75)

### Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in ‘Master’ and not ‘master.’*

## 2. Stop Secure Perfect Services on Secure Perfect 4.0 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or SP 4.0 as long as the services are set for automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 4.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

➤ **To stop services on the 4.0 Server computer and all clients:**

1. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

2. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
- If the **Status** columns display **Started**, then the services are running and need to be stopped.

3. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

4. If the **Secure Perfect API** service is running, stop that service now.
5. Exit the **Services** application.

## 3. Back Up Secure Perfect Folder

Everything in your existing SP 4.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility or Microsoft Enterprise Manager which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

## 4. Back Up Secure Perfect 4.0 Databases

Back up the SecurePerfect, SecurePerfectArchive, and SecurePerfectHistory databases on your SP 4.0 Server computer.

**Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.

If you are:

- Not familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- Familiar with Microsoft SQL Enterprise Manager, back up the three databases and then continue with 5. “OPTIONAL: Run Database Maintenance Plan Wizard” on page 72.

### ► To back up your Secure Perfect databases using Microsoft SQL Enterprise Manager:

1. Click **Start, Programs, Microsoft SQL Server, then Enterprise Manager.**
2. Click **Microsoft SQL Servers.**
3. Click **SQL Server Group.**
4. Click the name of your server.
5. Click **Databases.**

6. Right-click **SecurePerfect.**

**Result:** The **SQL Server Enterprise Manager - Secure Perfect Shortcut** menu displays.

7. Click **All Tasks, then Backup Database.**

**Result:** The **SQL Server Backup** dialog box displays.

8. In the **Name** field, you can keep the default or choose a different name.

9. Select the **Database - complete** option button.

10. Under the **Destination**, you can choose either a file name or a device, such as a tape. (The first time you perform this function, you will be required to create the device by clicking **Add.**) We recommend that you select the device or a file on a network.

11. You may select either **Overwrite existing media** or **Append to media**. The latter option is useful when using a tape that can hold a large quantity of data.

12. You can schedule the backup by selecting the **Schedule** check box. The button with the three dots is now enabled, which allows you to edit the schedule. We recommend that you refer to the SQL Online Help for more information.

13. Click **OK** to start the backup.

**Result:** A **Backup Progress** dialog box will display.

14. When the **Backup operation has been completed successfully** screen displays, click **OK.**

15. Repeat steps 6 through 14 for the other two databases: SecurePerfectHistory and SecurePerfectArchive.
16. Exit the SQL Server Enterprise Manager.

## 5. OPTIONAL: Run Database Maintenance Plan Wizard

If the integrity of your SP 4.0 Server computer database becomes questionable, you can run the **Database Maintenance Plan Wizard** which will attempt to correct the suspect data and shrink the size of your database.

### ► To run the Database Maintenance Plan Wizard:

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Navigate to each Secure Perfect database folder.
7. Select a database, then right-click.
8. Select **All Tasks** on the shortcut menu, then **Maintenance Plan**.  
**Result:** The **Database Maintenance Plan Wizard** displays.
9. Click **Next**.
10. Select specific databases from the list on the **Select Databases for which to create the maintenance plan**. Click **Next**.
11. Select **Update Data Optimization Information** options. Click **Next**.
12. Select **Check database integrity options** choices. Click **Next**.
13. Select the where and when options on the **Specify the Database Backup Plan** screen. Click **Next**.
14. Select the where and when options on the **Specify Backup Disk Directory**. Click **Next**.
15. Select the where and when options on the **Specify the Transaction Log Backup Plan** screen. Click **Next**.
16. Select the where and when options on the **Reports to Generate** screen. Click **Next**.
17. Specify how you want to store the maintenance plan records on the **Maintenance Plan History** screen. Click **Next**.



18. When **Completing the Database Maintenance Plan Wizard** screen displays, review your selections by scrolling through the list. Click **Finish** if you are satisfied with the selections you have made.
19. Exit the application.

## 6. Back Up Clean Secure Perfect 4.0 Databases

If you elected to run the database maintenance plan wizard, a backup of the cleaned database files would be appropriate at this time. Refer to instructions in step 4. [“Back Up Secure Perfect 4.0 Databases” on page 71.](#)

## 7. Install Secure Perfect 6.1 and License Your System

### ► To install the SP 6.1 application:

1. You MUST be logged in as the local administrator user. If not, log out and log back in as a user with these permissions.
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - SP 4.0 is automatically uninstalled.
  - The ‘Create SP Database’ utility automatically launches.

**NOTE DURING DATABASE CONVERSION:** *During a conversion, if a database already exists:*

*a. You must select the Secure Perfect edition that you want to install.*

*b. You are prompted for your SQL ‘sa’ password. Your previously assigned and encrypted SQL password displays. (If you purchased your Secure Perfect 6.1 system from GE, a temporary password of master was assigned for you.)*

*c. A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect. Click **Yes**, you want to convert.*

*d. A window displays your current Secure Perfect version. Click **Convert Database** to accept the required version and begin the database creation.*

- The license application automatically launches. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 8. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step restores the SP 4.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 4.0 backup source into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 4.0 backup source into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 4.0 backup source into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 4.0 backup source into the Signature folder on the SP 6.1 Server computer.

## 9. Activate Enable Unique & Required Employee Number

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [10. "Upgrade Client Computers" on page 75.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).

OR

- Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.  
  
**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**
  5. Click **Yes**.  
  
**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**
  6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
  7. Navigate to the Secure Perfect\Logs\DuplicateEmployeeNumbers.txt file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
  8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
  9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
  10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 10. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 11. Put Micros Online and Flash Micros with Application Code

SP 6.1 software will communicate with micros flashed with 4.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## Scenario 2 - Different Computer (Using Two Computers)

If your Server computer will be a different computer than your existing Secure Perfect computer, then follow the instructions in this section.

- This scenario follows a specific sequence of steps. **FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW.** Each one of these steps is explained in more detail in the sections that follow. To upgrade using a second computer:

“Before You Begin” on page 76

1. Note all Secure Perfect Operator Passwords (page 76)
2. Set Up Secure Perfect 6.1 Server (page 77)
3. Stop Secure Perfect Services on Secure Perfect 4.0 Server (page 77)
4. Back Up Secure Perfect Folder (page 78)
5. OPTIONAL: Run Database Maintenance Plan Wizard (page 78)
6. Back Up Secure Perfect 4.0 Databases (page 79)
7. Restore Secure Perfect 4.0 Database to Secure Perfect 6.1 Server (page 80)
8. Run Create SP Database (page 83)
9. License Your Secure Perfect 6.1 System (page 84)
10. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server (page 84)
11. Activate Enable Unique & Required Employee Number (page 84)
12. Upgrade Client Computers (page 85)
13. Put Micros Online and Flash Application Code (page 86)
14. Uninstall Secure Perfect 4.0 from the Original Computer (page 86)
15. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer (page 86)

### Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience*

*a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

## 2. Set Up Secure Perfect 6.1 Server

### ► To set up your SP 6.1 Server computer:

1. Since your new SP 6.1 database Server will be a different computer than your current SP 4.0 Server, you will need to configure the computer now. This includes setting up:
  - Hardware (such as the monitor, network board, and Digi board, if one is used)
  - Software
    - Windows 2000 or Windows 2003 Server operating system
    - SQL Server 2000 with appropriate Service Pack (At this time, Service Pack 3a is required and auto installs with SP 6.1.)
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - The 'Create SP Database' utility automatically launches.
  - The license application automatically launches. **DO NOT license at this time (as instructed in the sequence).** You will license your system after the database is converted.
3. Return to this point and continue.

## 3. Stop Secure Perfect Services on Secure Perfect 4.0 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or Secure Perfect as long as services are set to Automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 4.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

### ► To stop services on the 4.0 Server computer and all clients:

1. Set all micros offline in Secure Perfect.
2. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

3. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
4. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

5. If the **Secure Perfect API** service is running, stop that service now.
6. Exit the **Services** application.

## 4. Back Up Secure Perfect Folder

Everything in your existing SP 4.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility or Microsoft Enterprise Manager which will be explained in a following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

## 5. OPTIONAL: Run Database Maintenance Plan Wizard

If the integrity of your SP 4.0 Server computer database becomes questionable, you can run the **Database Maintenance Plan Wizard** which will attempt to correct the suspect data and shrink the size of your database.

### ► To run the Database Maintenance Plan Wizard:

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.

6. Navigate to each Secure Perfect database folder.
7. Select a database, then right-click.
8. Select **All Tasks** on the shortcut menu, then **Maintenance Plan**.  
**Result:** The **Database Maintenance Plan Wizard** displays.
9. Select all or specific databases from the list on the **Select Databases for which to create the maintenance plan** screen. Click **Next**.
10. Select **Update Data Optimization Information** options. Click **Next**.
11. Select **Database Integrity Check** options. Click **Next**.
12. Select the where and when options on the **Specify the Database Backup Plan** screen. Click **Next**.
13. Select the where and when options on the **Specify Backup Disk Directory**. Click **Next**.
14. Select the where and when options on the **Specify the Transaction Log Backup Plan** screen. Click **Next**.
15. Select the where and when options on the **Reports to Generate** screen. Click **Next**.
16. Specify how you want to store the maintenance plan records on the **Maintenance Plan History** screen. Click **Next**.
17. When **Completing the Database Maintenance Plan Wizard** screen displays, scroll and review your selections. Click **Finish** if you are satisfied with the selections you have made.

## 6. Back Up Secure Perfect 4.0 Databases

Back up the SecurePerfect, SecurePerfectArchive, and SecurePerfectHistory databases on your SP 4.0 Server computer. These databases will be restored onto the new SP 6.1 Server computer.

**Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.

If you are:

- Not familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- Familiar with Microsoft SQL Enterprise Manager, back up the three databases and then continue with 7. “Restore Secure Perfect 4.0 Database to Secure Perfect 6.1 Server” on page 80.

### ► To back up your Secure Perfect databases using Microsoft SQL Enterprise Manager:

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.

4. Click the name of your server.
5. Click **Databases**.
6. Right-click **SecurePerfect**.

**Result:** The **SQL Server Enterprise Manager - Secure Perfect Shortcut** menu displays.

7. Click **All Tasks**, then **Backup Database**.

**Result:** The **SQL Server Backup** dialog box displays.

8. In the **Name** field, you can keep the default or choose a different name.
9. Select the **Database - complete** option button.
10. Under the **Destination**, you can choose either a file name or a device, such as a tape. (The first time you perform this function, you will be required to create the device by clicking **Add**.) We recommend that you select the device or a file on a network.
11. You may select either **Overwrite existing media** or **Append to media**. The latter option is useful when using a tape that can hold a large quantity of data.
12. You can schedule the backup by selecting the **Schedule** check box. The button with the three dots is now enabled, which allows you to edit the schedule. We recommend that you refer to the SQL Online Help for more information.
13. Click **OK** to start the backup.  
**Result:** A **Backup Progress** dialog box will display.
14. When the **Backup operation has been completed successfully** screen displays, click **OK**.
15. Repeat steps 6 through 14 for the other two databases: SecurePerfectHistory and SecurePerfectArchive.
16. Exit the Microsoft SQL Server Enterprise Manager application.

## 7. Restore Secure Perfect 4.0 Database to Secure Perfect 6.1 Server

These restore procedures are guidelines only.

**Note:** When you are restoring the SP 4.0 databases, you will replace the databases that were created during the SP 6.1 installation.

If you are:

- NOT familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- FAMILIAR with Microsoft SQL Enterprise Manager, restore the three databases and then proceed with 8. “Run Create SP Database” on page 83.



► **To restore the SP 4.0 databases backup:**

1. Verify that all SP 6.1 network clients other than the Enterprise Server computer have logged out and that the SP 6.1 services are shut down.
2. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
3. Navigate to <Server Name>SPSQL where <Server Name> is the name of the server computer.
4. Open the Databases folder for your Secure Perfect server.

The database was backed up using one of two options: disk or tape. Refer to the list below for the appropriate restore procedures.

- From disk, see page 81.
- From tape, see page 82.

## Restoring from Disk

If the databases were backed up onto disk, follow the procedures below.

If the databases were backed up onto tape, refer to [page 82](#).

► **To restore the SP 4.0 databases backup from disk:**

1. Select **SecurePerfect**.
2. From the **Tools** menu, select **Restore Database**.  
**Result:** The **Restore database** window displays.
3. In the **Restore as database** field, verify that **SecurePerfect** displays.
4. In the **Restore** category, select **From device**.
5. On the **Parameters** pane, verify that **Restore backup set** and **Database - complete** are selected.
6. Click **Select Devices**.  
**Result:** The **Choose Restore Devices** window displays.
7. In the **Restore from** area, select **Disk** and click **Add**.  
**Result:** The **Choose Restore Destination** window displays.
8. Select **File name**, click **Browse**, and navigate to where the backup file is stored. When the path and file name display in the **File name** field, click **OK** in the **Backup Device Location** window.
9. Click **OK** to close the **Choose Restore Destination** window.
10. Click **OK** to close the **Choose Restore Devices** window.

11. Click **Options**.
12. Check **Force restore over existing database**.
13. In the **Move to physical file name** field, confirm that the path to the Secure Perfect databases displays. If the correct path does not display, enter it by typing over the existing path.
14. Click **OK**.
15. Click **OK** to begin the restore process.

**Result:** The **Restore Progress** dialog displays. Upon completion, you should receive a message stating that the restore was successful. Depending on the size of your database, this can take from a few minutes to a few hours.

16. Repeat steps 1 through 15 for the SecurePerfectArchive and SecurePerfectHistory databases.
17. Exit the Microsoft SQL Server Enterprise Manager application.

At this time, go to [8. “Run Create SP Database” on page 83](#) to continue with the upgrade.

## Restoring from Tape

If the databases were backed up onto tape, follow the procedures below.

### ► To restore the SP 4.0 databases from tape:

1. Select **SecurePerfect**.
2. From the **Tools** menu, select **Restore Database**.  
**Result:** The **Restore database** window displays.
3. In the **Restore as database** field, verify that SecurePerfect displays.
4. At the **Restore:** category, select the **From device** option button.
5. In the **Parameters Devices** area, verify that **Restore backup set** and **Database - complete** are selected.
6. Click **Select Devices**.
7. In the window that displays, select **Tape**, then click **Add**.  
**Result:** The tape drive displays as the default in the **Choose Restore Destination** dialog box.
8. Click **OK** two times.
9. Click **Options**.
10. Check **Force restore over existing database**.

11. In the **Move to physical file name** field, confirm that the path to the Secure Perfect databases displays. If the correct path does not display, enter it by typing over the existing path.
12. Click **OK**.

***Note:** If you get an error message or if you have multiple files to restore, click View Contents. A list of files will display with the contents of the tape. Select which file or files you want to restore from the list.*

**Result:** An SQL Server Enterprise Manager window will display stating, **Restore of database 'Secure Perfect' completed successfully**. Depending on the size of your database, this can take from a few minutes to a few hours.

13. Repeat steps 1 through 12 for the SecurePerfectArchive and SecurePerfectHistory databases.
14. Exit the Microsoft SQL Server Enterprise Manager application.

## 8. Run Create SP Database



*The database Server computer **MUST** be the computer on which you run the database conversion.*

The 'Create SP Database' utility converts the SP 4.0 database format to SP 6.1 database format.

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

### ► To run 'Create SP Database' on your SP 6.1 Server computer:

1. Click **Programs, Secure Perfect, then Create SP Database**.

**Result:** The **Select Secure Perfect Edition** window displays.

2. Select **Enterprise Edition** and click **Next**.

**Result:** The **Create/Convert Database** window displays.

3. Enter your sa password.

4. Click **Create/Convert Database**.

**Result:** A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect.

5. Click **Yes** to proceed.

**Result:** The **Convert Database** window displays.

6. Click **Convert Database**.

**Result:** A status bar displays the progress of the conversion. Upon completion, the message **Secure Perfect Database successfully converted!** displays.

7. Click **OK**.

## 9. License Your Secure Perfect 6.1 System

At this time, you must license SP 6.1. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 10. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step moves the SP 4.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 4.0 computer into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 4.0 computer into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 4.0 computer into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 4.0 computer into the Signature folder on the SP 6.1 Server computer.

## 11. Activate Enable Unique & Required Employee Number

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [12. "Upgrade Client Computers" on page 85.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).
  - OR
  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.  
  
**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**
5. Click **Yes**.  
  
**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**
6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 12. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to ["Upgrading Client Computers" on page 112.](#)

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

### 13. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 4.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

### 14. Uninstall Secure Perfect 4.0 from the Original Computer

Once SP 6.1 is installed, configured, and running on the new computer, you may uninstall SP 4.0 from the original computer.

► **To uninstall SP 4.0:**

1. Click **Start, Settings, Control Panel**, then **Add/Remove Programs**.
2. Click **Secure Perfect 4.0**. You may need to scroll down.
3. Click **Remove**.

**Result:** The message **Are you sure you want to remove Secure Perfect 4.0 from your computer?** displays.

4. Click **Yes**.

**Result:** The SP 4.0 application will be removed.

### 15. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer

MSDE may now be uninstalled from your original computer.

► **To uninstall MSDE software:**

1. Log in as the local administrator user.
2. Refer to [“Removing Microsoft SQL Server Desktop Engine \(MSDE\) - Secure Perfect 6.1 Professional” on page 15.9](#) of the *Secure Perfect 6.1 Installation Manual*.

## SP 5.0 to Secure Perfect 6.1

Follow one of two scenarios when converting to SP 6.1:

**Note:** If your SP 6.1 Server computer will be the same computer as your existing Secure Perfect system, refer to Scenario 1. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.

**Scenario 1:** The SP 6.1 Server computer will be the **same** as the existing SP 5.0 computer.

**Scenario 1 begins on [page 87](#).**

**Note:** If you plan on using a new or different computer for your SP 6.1 Server, refer to Scenario 2. Throughout this chapter, we refer to the new computer as the SP 6.1 Server computer.

**Scenario 2:** The SP 6.1 Server computer will be a **different** computer than the existing SP 5.0 computer.

**Scenario 2 begins on [page 94](#).**

### Scenario 1 - Same Computer

If your SP 6.1 Enterprise Server computer will be the same computer as your existing SP 5.0 system, then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using the same computer:**

[“Before You Begin” on page 88](#)

1. [Note all Secure Perfect Operator Passwords \(page 88\)](#)
2. [Stop Secure Perfect Services on Secure Perfect 5.0 Server \(page 88\)](#)
3. [Back Up Secure Perfect Folder \(page 89\)](#)
4. [Back Up Secure Perfect 5.0 Databases \(page 89\)](#)
5. [OPTIONAL: Run Database Maintenance Plan Wizard \(page 90\)](#)
6. [Back Up Clean Secure Perfect 5.0 Databases \(page 91\)](#)
7. [Install Secure Perfect 6.1 and License Your System \(page 91\)](#)
8. [Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server \(page 92\)](#)
9. [Activate Enable Unique & Required Employee Number \(page 92\)](#)
10. [Upgrade Client Computers \(page 93\)](#)
11. [Put Micros Online and Flash Micros with Application Code \(page 93\)](#)

## Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

## 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

## 2. Stop Secure Perfect Services on Secure Perfect 5.0 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or SP 5.0 as long as the services are set for automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 5.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

### ➤ To stop services on the 5.0 Server computer and all clients:

1. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

2. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
3. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

4. If the **Secure Perfect API** service is running, stop that service now.
5. Exit the **Services** application.



### 3. Back Up Secure Perfect Folder

Everything in your existing SP 5.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility or Microsoft Enterprise Manager which will be explained in the following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

### 4. Back Up Secure Perfect 5.0 Databases

Back up the SecurePerfect, SecurePerfectArchive, and SecurePerfectHistory databases on your SP 5.0 Server computer.

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

If you are:

- Not familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- Familiar with Microsoft SQL Enterprise Manager, back up the three databases and then continue with 5. “OPTIONAL: Run Database Maintenance Plan Wizard” on page 72.

► **To back up your Secure Perfect databases using Microsoft SQL Enterprise Manager:**

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Right-click **SecurePerfect**.

**Result:** The **SQL Server Enterprise Manager - Secure Perfect Shortcut** menu displays.

7. Click **All Tasks**, then **Backup Database**.

**Result:** The **SQL Server Backup** dialog box displays.

8. In the **Name** field, you can keep the default or choose a different name.
9. Select the **Database - complete** option button.
10. Under the **Destination**, you can choose either a file name or a device, such as a tape. (The first time you perform this function, you will be required to create the device by clicking **Add**.) We recommend that you select the device or a file on a network.

11. You may select either **Overwrite existing media** or **Append to media**. The latter option is useful when using a tape that can hold a large quantity of data.
12. You can schedule the backup by selecting the **Schedule** check box. The button with the three dots is now enabled, which allows you to edit the schedule. We recommend that you refer to the SQL Online Help for more information.
13. Click **OK** to start the backup.  
**Result:** A **Backup Progress** dialog box will display.
14. When the **Backup operation has been completed successfully** screen displays, click **OK**.
15. Repeat steps 6 through 14 for the other two databases: SecurePerfectHistory and SecurePerfectArchive.
16. Exit the SQL Server Enterprise Manager.

## 5. OPTIONAL: Run Database Maintenance Plan Wizard

If the integrity of your SP 5.0 Server computer database becomes questionable, you can run the **Database Maintenance Plan Wizard** which will attempt to correct the suspect data and shrink the size of your database.

### ► To run the Database Maintenance Plan Wizard:

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Navigate to each Secure Perfect database folder.
7. Select a database, then right-click.
8. Select **All Tasks** on the shortcut menu, then **Maintenance Plan**.

**Result:** The **Database Maintenance Plan Wizard** displays.

9. Click **Next**.
10. Select specific databases from the list on the **Select Databases for which to create the maintenance plan**. Click **Next**.
11. Select **Update Data Optimization Information** options. Click **Next**.
12. Select **Check database integrity options** choices. Click **Next**.

13. Select the where and when options on the **Specify the Database Backup Plan** screen. Click **Next**.
14. Select the where and when options on the **Specify Backup Disk Directory**. Click **Next**.
15. Select the where and when options on the **Specify the Transaction Log Backup Plan** screen. Click **Next**.
16. Select the where and when options on the **Reports to Generate** screen. Click **Next**.
17. Specify how you want to store the maintenance plan records on the **Maintenance Plan History** screen. Click **Next**.
18. When **Completing the Database Maintenance Plan Wizard** screen displays, review your selections by scrolling through the list. Click **Finish** if you are satisfied with the selections you have made.
19. Exit the application.

## 6. Back Up Clean Secure Perfect 5.0 Databases

If you elected to run the database maintenance plan wizard, a backup of the cleaned database files would be appropriate at this time. Refer to instructions in step 4. [“Back Up Secure Perfect 5.0 Databases” on page 89.](#)

## 7. Install Secure Perfect 6.1 and License Your System

### ► To install the SP 6.1 application:

1. You **MUST** be logged in as the local administrator user. If not, log out and log back in as a user with these permissions.
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - SP 5.0 is automatically uninstalled.
  - The ‘Create SP Database’ utility automatically launches.

**NOTE DURING DATABASE CONVERSION:** *During a conversion, if a database already exists:*

*a. You must select the Secure Perfect edition that you want to install.*

*b. You are prompted for your SQL ‘sa’ password. Your previously assigned and encrypted SQL password displays. (If you purchased your Secure Perfect 6.1 system from GE, a temporary password of master was assigned for you.)*

c. A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect. Click **Yes**, you want to convert.

d. A window displays your current Secure Perfect version. Click **Convert Database** to accept the required version and begin the database creation.

- The license application automatically launches. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 8. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step restores the SP 5.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

**Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 5.0 backup source into the Designs folder on the SP 6.1 Server computer.

**Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.

2. Copy the graphics from the SP 5.0 backup source into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 5.0 backup source into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 5.0 backup source into the Signature folder on the SP 6.1 Server computer.

## 9. Activate Enable Unique & Required Employee Number

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [10. "Upgrade Client Computers" on page 93](#).
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.

3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).

OR

  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**
5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**
6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).
10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 10. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 11. Put Micros Online and Flash Micros with Application Code

SP 6.1 software will communicate with micros flashed with 5.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the

appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## ***Scenario 2 - Different Computer (Using Two Computers)***

**If your Server computer will be a different computer than your existing Secure Perfect computer,** then follow the instructions in this section.

- **This scenario follows a specific sequence of steps. FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade using a second computer:**

[“Before You Begin” on page 94](#)

1. [Note all Secure Perfect Operator Passwords \(page 95\)](#)
2. [Set Up Secure Perfect 6.1 Server \(page 95\)](#)
3. [Stop Secure Perfect Services on Secure Perfect 5.0 Server \(page 95\)](#)
4. [Back Up Secure Perfect Folder \(page 96\)](#)
5. [OPTIONAL: Run Database Maintenance Plan Wizard \(page 96\)](#)
6. [Back Up Secure Perfect 5.0 Databases \(page 97\)](#)
7. [Restore Secure Perfect 5.0 Database to Secure Perfect 6.1 Server \(page 98\)](#)
8. [Run Create SP Database \(page 101\)](#)
9. [License Your Secure Perfect 6.1 System \(page 102\)](#)
10. [Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server \(page 102\)](#)
11. [Activate Enable Unique & Required Employee Number \(page 102\)](#)
12. [Upgrade Client Computers \(page 103\)](#)
13. [Put Micros Online and Flash Application Code \(page 103\)](#)
14. [Uninstall Secure Perfect 5.0 from the Original Computer \(page 104\)](#)
15. [Uninstall Microsoft SQL Server Desktop Engine from the Original Computer \(page 104\)](#)

### **Before You Begin**

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

## 1. Note all Secure Perfect Operator Passwords

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

## 2. Set Up Secure Perfect 6.1 Server

### ► To set up your SP 6.1 Server computer:

1. Since your new SP 6.1 database Server will be a different computer than your current SP 5.0 Server, you will need to configure the computer now. This includes setting up:
  - Hardware (such as the monitor, network board, and Digi board, if one is used)
  - Software
    - Windows 2000 or Windows 2003 Server operating system
    - SQL Server 2000 with appropriate Service Pack (At this time, Service Pack 3a is required and auto installs with SP 6.1.)
2. Install SP 6.1. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Some items to note:
  - If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
  - The 'Create SP Database' utility automatically launches.
  - The license application automatically launches. **DO NOT license at this time (as instructed in the sequence).** You will license your system after the database is converted.
3. Return to this point and continue.

## 3. Stop Secure Perfect Services on Secure Perfect 5.0 Server

The Secure Perfect services run regardless of whether anyone is logged into Windows or Secure Perfect as long as services are set to Automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on all SP 5.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

### ► To stop services on the 5.0 Server computer and all clients:

1. Set all micros offline in Secure Perfect.
2. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

3. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
4. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.

**Result:** The **Status** columns should now be blank.

5. If the **Secure Perfect API** service is running, stop that service now.
6. Exit the **Services** application.

#### 4. Back Up Secure Perfect Folder

Everything in your existing SP 5.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Back up the Database folder using the Backup and Restore Maintenance Utility or Microsoft Enterprise Manager which will be explained in a following section. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

#### 5. OPTIONAL: Run Database Maintenance Plan Wizard

If the integrity of your SP 5.0 Server computer database becomes questionable, you can run the **Database Maintenance Plan Wizard** which will attempt to correct the suspect data and shrink the size of your database.

➤ **To run the Database Maintenance Plan Wizard:**

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.



6. Navigate to each Secure Perfect database folder.
7. Select a database, then right-click.
8. Select **All Tasks** on the shortcut menu, then **Maintenance Plan**.  
**Result:** The **Database Maintenance Plan Wizard** displays.
9. Select all or specific databases from the list on the **Select Databases for which to create the maintenance plan** screen. Click **Next**.
10. Select **Update Data Optimization Information** options. Click **Next**.
11. Select **Database Integrity Check** options. Click **Next**.
12. Select the where and when options on the **Specify the Database Backup Plan** screen. Click **Next**.
13. Select the where and when options on the **Specify Backup Disk Directory**. Click **Next**.
14. Select the where and when options on the **Specify the Transaction Log Backup Plan** screen. Click **Next**.
15. Select the where and when options on the **Reports to Generate** screen. Click **Next**.
16. Specify how you want to store the maintenance plan records on the **Maintenance Plan History** screen. Click **Next**.
17. When **Completing the Database Maintenance Plan Wizard** screen displays, scroll and review your selections. Click **Finish** if you are satisfied with the selections you have made.

## 6. Back Up Secure Perfect 5.0 Databases

Back up the SecurePerfect, SecurePerfectArchive, and SecurePerfectHistory databases on your SP 5.0 Server computer. These databases will be restored onto the new SP 6.1 Server computer.

**Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.

If you are:

- Not familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- Familiar with Microsoft SQL Enterprise Manager, back up the three databases and then continue with 7. “Restore Secure Perfect 5.0 Database to Secure Perfect 6.1 Server” on page 98.

### ► To back up your Secure Perfect databases using Microsoft SQL Enterprise Manager:

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.

4. Click the name of your server.
5. Click **Databases**.
6. Right-click **SecurePerfect**.

**Result:** The **SQL Server Enterprise Manager - Secure Perfect Shortcut** menu displays.

7. Click **All Tasks**, then **Backup Database**.

**Result:** The **SQL Server Backup** dialog box displays.

8. In the **Name** field, you can keep the default or choose a different name.
9. Select the **Database - complete** option button.
10. Under the **Destination**, you can choose either a file name or a device, such as a tape. (The first time you perform this function, you will be required to create the device by clicking **Add**.) We recommend that you select the device or a file on a network.
11. You may select either **Overwrite existing media** or **Append to media**. The latter option is useful when using a tape that can hold a large quantity of data.
12. You can schedule the backup by selecting the **Schedule** check box. The button with the three dots is now enabled, which allows you to edit the schedule. We recommend that you refer to the SQL Online Help for more information.
13. Click **OK** to start the backup.  
**Result:** A **Backup Progress** dialog box will display.
14. When the **Backup operation has been completed successfully** screen displays, click **OK**.
15. Repeat steps 6 through 14 for the other two databases: SecurePerfectHistory and SecurePerfectArchive.
16. Exit the Microsoft SQL Server Enterprise Manager application.

## 7. Restore Secure Perfect 5.0 Database to Secure Perfect 6.1 Server

These restore procedures are guidelines only.

**Note:** When you are restoring the SP 5.0 databases, you will replace the databases that were created during the SP 6.1 installation.

If you are:

- NOT familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- FAMILIAR with Microsoft SQL Enterprise Manager, restore the three databases and then proceed with 8. “Run Create SP Database” on page 101.

► **To restore the SP 5.0 databases backup:**

1. Verify that all SP 6.1 network clients other than the Enterprise Server computer have logged out and that the SP 6.1 services are shut down.
2. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
3. Navigate to <Server Name>SPSQL where <Server Name> is the name of the server computer.
4. Open the Databases folder for your Secure Perfect server.

The database was backed up using one of two options: disk or tape. Refer to the list below for the appropriate restore procedures.

- From disk, see page 99.
- From tape, see page 100.

## Restoring from Disk

If the databases were backed up onto disk, follow the procedures below.

If the databases were backed up onto tape, refer to [page 100](#).

► **To restore the SP 5.0 databases backup from disk:**

1. Select **SecurePerfect**.
2. From the **Tools** menu, select **Restore Database**.  
**Result:** The **Restore database** window displays.
3. In the **Restore as database** field, verify that **SecurePerfect** displays.
4. In the **Restore** category, select **From device**.
5. On the **Parameters** pane, verify that **Restore backup set** and **Database - complete** are selected.
6. Click **Select Devices**.  
**Result:** The **Choose Restore Devices** window displays.
7. In the **Restore from** area, select **Disk** and click **Add**.  
**Result:** The **Choose Restore Destination** window displays.
8. Select **File name**, click **Browse**, and navigate to where the backup file is stored. When the path and file name display in the **File name** field, click **OK** in the **Backup Device Location** window.
9. Click **OK** to close the **Choose Restore Destination** window.
10. Click **OK** to close the **Choose Restore Devices** window.

11. Click **Options**.
12. Check **Force restore over existing database**.
13. In the **Move to physical file name** field, confirm that the path to the Secure Perfect databases displays. If the correct path does not display, enter it by typing over the existing path.
14. Click **OK**.
15. Click **OK** to begin the restore process.

**Result:** The **Restore Progress** dialog displays. Upon completion, you should receive a message stating that the restore was successful. Depending on the size of your database, this can take from a few minutes to a few hours.

16. Repeat steps 1 through 15 for the SecurePerfectArchive and SecurePerfectHistory databases.
17. Exit the Microsoft SQL Server Enterprise Manager application.

At this time, go to 8. [“Run Create SP Database” on page 101](#) to continue with the upgrade.

## Restoring from Tape

If the databases were backed up onto tape, follow the procedures below.

### ► To restore the SP 5.0 databases from tape:

1. Select **SecurePerfect**.
2. From the **Tools** menu, select **Restore Database**.  
**Result:** The **Restore database** window displays.
3. In the **Restore as database** field, verify that SecurePerfect displays.
4. At the **Restore:** category, select the **From device** option button.
5. In the **Parameters Devices** area, verify that **Restore backup set** and **Database - complete** are selected.
6. Click **Select Devices**.
7. In the window that displays, select **Tape**, then click **Add**.  
**Result:** The tape drive displays as the default in the **Choose Restore Destination** dialog box.
8. Click **OK** two times.
9. Click **Options**.
10. Check **Force restore over existing database**.

11. In the **Move to physical file name** field, confirm that the path to the Secure Perfect databases displays. If the correct path does not display, enter it by typing over the existing path.
12. Click **OK**.

***Note:** If you get an error message or if you have multiple files to restore, click View Contents. A list of files will display with the contents of the tape. Select which file or files you want to restore from the list.*

**Result:** An SQL Server Enterprise Manager window will display stating, **Restore of database 'Secure Perfect' completed successfully**. Depending on the size of your database, this can take from a few minutes to a few hours.

13. Repeat steps 1 through 12 for the SecurePerfectArchive and SecurePerfectHistory databases.
14. Exit the Microsoft SQL Server Enterprise Manager application.

## 8. Run Create SP Database



*The database Server computer **MUST** be the computer on which you run the database conversion.*

The 'Create SP Database' utility converts the SP 5.0 database format to SP 6.1 database format.

***Note:** Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

### ► To run 'Create SP Database' on your SP 6.1 Server computer:

1. Click **Programs, Secure Perfect, then Create SP Database**.

**Result:** The **Select Secure Perfect Edition** window displays.

2. Select **Enterprise Edition** and click **Next**.

**Result:** The **Create/Convert Database** window displays.

3. Enter your sa password.

4. Click **Create/Convert Database**.

**Result:** A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect.

5. Click **Yes** to proceed.

**Result:** The **Convert Database** window displays.

6. Click **Convert Database**.

**Result:** A status bar displays the progress of the conversion. Upon completion, the message **Secure Perfect Database successfully converted!** displays.

7. Click **OK**.

## 9. License Your Secure Perfect 6.1 System

At this time, you must license SP 6.1. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 10. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 Server

This step moves the SP 5.0 designs, graphics, images, and signatures to the SP 6.1 Server computer.

***Note:** If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 5.0 computer into the Designs folder on the SP 6.1 Server computer.

***Note:** If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 5.0 computer into the Graphics folder on the SP 6.1 Server computer.
3. Copy the images from the SP 5.0 computer into the Images folder on the SP 6.1 Server computer.
4. Copy the signatures from the SP 5.0 computer into the Signature folder on the SP 6.1 Server computer.

## 11. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log in and open the Parameter Form to display the Settings tab:

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [12. "Upgrade Client Computers" on page 103](#).
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:

- Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).
- OR
- Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.  
  
**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**
  5. Click **Yes**.  
  
**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**
  6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
  7. Navigate to the `Secure Perfect\Logs\DuplicateEmployeeNumbers.txt` file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
  8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
  9. If you cannot save and again receive additional messages, you must repeat the process, steps 5 through 8.
  10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 12. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 13. Put Micros Online and Flash Application Code

SP 6.1 software will communicate with micros flashed with 5.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.x firmware to minimize data loss. The duration of time that the upload will take is

dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## 14. Uninstall Secure Perfect 5.0 from the Original Computer

Once SP 6.1 is installed, configured, and running on the new computer, you may uninstall SP 5.0 from the original computer.

### ► To uninstall SP 5.0:

1. Click **Start, Settings, Control Panel**, then **Add/Remove Programs**.
2. Click **Secure Perfect 5.0**. You may need to scroll down.
3. Click **Remove**.

**Result:** The message **Are you sure you want to remove Secure Perfect 5.0 from your computer?** displays.

4. Click **Yes**.

**Result:** The SP 5.0 application will be removed.

## 15. Uninstall Microsoft SQL Server Desktop Engine from the Original Computer

MSDE may now be uninstalled from your original computer.

### ► To uninstall MSDE software:

1. Log in as the local administrator user.
2. Refer to [“Removing Microsoft SQL Server Desktop Engine \(MSDE\) - Secure Perfect 6.1 Professional” on page 15.9](#) of the *Secure Perfect 6.1 Installation Manual*.



## Upgrading Custom Split Installations - SP 5.0 to SP 6.1 ONLY

The Secure Perfect 6.1 Enterprise Server computer runs on Windows 2000 or Windows 2003 Server Standard operating system. Client computers run on Windows 2000 Professional, Windows XP Professional, Windows 2000 Server or Windows 2003 Server operating systems.

Since the split installation option allows you to install the three Secure Perfect components (Database Server, File Server, and Application) separately, the upgrade will need to proceed in the same order in which they were installed.

**Note:** *The steps below assume each application is on a separate computer. If you used only two, simply go to the computer where that component is located.*

After you have upgraded the Server computer, you will need to upgrade your client computers. This will be discussed following the Server upgrade, in [“Upgrading Client Computers” on page 112](#).

- **FOLLOW THESE STEPS IN THE ORDER PRESENTED BELOW. Each one of these steps is explained in more detail in the sections that follow. To upgrade a custom split installation:**

[“Before You Begin” on page 106](#)

- **On the Secure Perfect Application:**

1. [Note all Secure Perfect Operator Passwords on the Application Computer \(page 106\)](#)
2. [Stop Secure Perfect Services on Secure Perfect 5.0 Server on the Application Computer \(page 106\)](#)

- **On the File Server:**

3. [Back Up Secure Perfect Folder on the File Server Computer \(page 107\)](#)

- **On the Database Server:**

4. [Back Up Secure Perfect 5.0 Databases Using Microsoft SQL Server Enterprise Manager \(page 107\)](#)
5. [OPTIONAL: Run Database Maintenance Plan Wizard \(page 108\)](#)
6. [Back Up Clean Secure Perfect 5.0 Databases \(page 109\)](#)

- **On All Computers:**

7. [Install Secure Perfect 6.1 and License Your System \(page 109\)](#)

- **On the File Server:**

8. [Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 File Server Computer \(page 110\)](#)

➤ **On the Secure Perfect Application:**

9. [Activate Enable Unique & Required Employee Number \(page 111\)](#)

➤ **On Completion of the Upgrade:**

10. [Upgrade Client Computers \(page 112\)](#)

11. [Put Micros Online and Flash Micros with Application Code \(page 112\)](#)

## Before You Begin

Before you upgrade Secure Perfect, make sure that:

- All clients are logged off and client services are stopped.
- All Secure Perfect applications, such as DiagView, are closed.

### 1. Note all Secure Perfect Operator Passwords on the Application Computer

Secure Perfect operator login passwords are case sensitive in SP 6.1. Before you upgrade, note the **exact case** used in all of your Secure Perfect operator login passwords.

### 2. Stop Secure Perfect Services on Secure Perfect 5.0 Server on the Application Computer

The Secure Perfect services run regardless of whether anyone is logged into Windows or SP 5.0 as long as the services are set for automatic startup. In other words, if the computer is turned on, then the services are running.

To continue this upgrade, the services must be stopped on any SP 5.0 computers.



*Shutting down the Secure Perfect services shuts down any clients currently connected to the Server without saving any work in progress!*

➤ **To stop services on the 5.0 Application computer and all clients:**

1. Set all micros offline in Secure Perfect.
2. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

3. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.

- If the **Status** columns display **Started**, then the services are running and need to be stopped.
4. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.  
  
**Result:** The **Status** columns should now be blank.
  5. If the Secure Perfect API service is running, stop that service now.
  6. Exit the **Services** application.

### 3. Back Up Secure Perfect Folder on the File Server Computer

Everything in your existing SP 5.0 Secure Perfect folder except the Database folder should be backed up. This includes the Designs, Graphics, Images, and Signature folders. Use any backup program you want. **You should back up to an external media device such as a tape, zipdisk, CD, or a network folder. Verify that your backups work correctly.** All designs, graphics, images, and signatures will need to be restored after SP 6.1 is installed.

### 4. Back Up Secure Perfect 5.0 Databases Using Microsoft SQL Server Enterprise Manager

Back up the SecurePerfect, SecurePerfectArchive, and SecurePerfectHistory databases on your SP 5.0 Database Server computer. These databases will be restored onto the new SP 6.1 Database Server computer.

**Note:** *Custom stored procedures or triggers added to the Secure Perfect databases need to be removed. You can re-create custom procedures or triggers after the conversion is complete.*

If you are:

- Not familiar with Microsoft SQL Enterprise Manager, use the instructions below.
- Familiar with Microsoft SQL Enterprise Manager, back up the three databases and then continue with [5. "OPTIONAL: Run Database Maintenance Plan Wizard" on page 108.](#)

#### ➤ To back up your Secure Perfect databases using Microsoft SQL Enterprise Manager:

1. Click **Start, Programs, Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Right-click **SecurePerfect**.

**Result:** The SQL Server Enterprise Manager - Secure Perfect Shortcut menu displays.

7. Click **All Tasks**, then **Backup Database**.

**Result:** The **SQL Server Backup** dialog box displays.

8. In the **Name** field, you can keep the default or choose a different name.
9. Select the **Database - complete** option button.
10. Under the **Destination**, you can choose either a file name or a device, such as a tape. (The first time you perform this function, you will be required to create the device by clicking **Add**.) We recommend that you select the device or a file on a network.
11. You may select either **Overwrite existing media** or **Append to media**. The latter option is useful when using a tape that can hold a large quantity of data.
12. You can schedule the backup by selecting the **Schedule** check box. The button with the three dots is now enabled, which allows you to edit the schedule. We recommend that you refer to the SQL Online Help for more information.
13. Click **OK** to start the backup.

**Result:** A **Backup Progress** dialog box will display.

14. When the **Backup operation has been completed successfully** screen displays, click **OK**.
15. Repeat steps 3 through 11 for the other two databases: SecurePerfectHistory and SecurePerfectArchive.
16. Exit the SQL Server Enterprise Manager.

## 5. OPTIONAL: Run Database Maintenance Plan Wizard

On your SP 5.0 Database Server computer, if the integrity of your database becomes questionable, you can run the **Database Maintenance Plan Wizard**, which will attempt to correct the suspect data and shrink the size of your database.

### ► To run the Database Maintenance Plan Wizard:

1. Click **Start**, **Programs**, **Microsoft SQL Server**, then **Enterprise Manager**.
2. Click **Microsoft SQL Servers**.
3. Click **SQL Server Group**.
4. Click the name of your server.
5. Click **Databases**.
6. Navigate to each Secure Perfect database folder.
7. Select a database, then right-click.

8. Select **All Tasks** on the shortcut menu, then **Maintenance Plan**.  
**Result:** The **Database Maintenance Plan Wizard** displays.
9. Click **Next**.
10. Select specific databases from the list on the **Select Databases for which to create the maintenance plan**. Click **Next**.
11. Select **Update Data Optimization Information** options. Click **Next**.
12. Select **Check database integrity options** choices. Click **Next**.
13. Select the where and when options on the **Specify the Database Backup Plan** screen. Click **Next**.
14. Select the where and when options on the **Specify Backup Disk Directory**. Click **Next**.
15. Select the where and when options on the **Specify the Transaction Log Backup Plan** screen. Click **Next**.
16. Select the where and when options on the **Reports to Generate** screen. Click **Next**.
17. Specify how you want to store the maintenance plan records on the **Maintenance Plan History** screen. Click **Next**.
18. When **Completing the Database Maintenance Plan Wizard** screen displays, review your selections by scrolling through the list. Click **Finish** if you are satisfied with the selections you have made.
19. Exit the application.

## 6. Back Up Clean Secure Perfect 5.0 Databases

If you elected to run the database maintenance plan wizard, a backup of the cleaned database files would be appropriate at this time. Refer to instructions in step 4, [“Back Up Secure Perfect 5.0 Databases Using Microsoft SQL Server Enterprise Manager”](#) on page 107.

## 7. Install Secure Perfect 6.1 and License Your System

### ► To install the Secure Perfect 6.1 application:

1. You **MUST** be logged in as the local administrator user. If not, log off and log back on as a user with these permissions.
2. Follow the instructions as listed in the appropriate chapter of the *Secure Perfect 6.1 Installation Manual* for the Secure Perfect Edition that you are installing. Install in this order:
  - Database Server
  - File Server
  - Application

Some items to note:

- If SQL Server 2000 Service Pack 3a is not installed, the service pack installation will automatically run.
- Secure Perfect 5.0 is automatically uninstalled.
- The 'Create SP Database' utility automatically launches.

**NOTE DURING DATABASE CONVERSION:** *During a conversion, if a database already exists:*

*a. You must select the Secure Perfect edition that you want to install.*

*b. You are prompted for your SQL 'sa' password. Your previously assigned and encrypted SQL password displays. (If you purchased your Secure Perfect 6.1 system from GE, a temporary password of `master` was assigned for you.)*

*c. A warning message displays stating that this application is currently operating with an earlier version of Secure Perfect. Click **Yes**, you want to convert.*

*d. A window displays your current Secure Perfect version. Click **Convert Database** to accept the required version and begin the database creation.*

**Note:** *If the Application resides on the same computer as either the Database Server or File Server, DO NOT license the application until both the Database Server and File Server are installed and the database has been converted.*

- The license application automatically launches. Follow the steps as detailed in [Chapter 10 - Licensing the Secure Perfect System](#) of the *Secure Perfect 6.1 Installation Manual*.

## 8. Restore Designs, Graphics, Images, and Signatures to Secure Perfect 6.1 File Server Computer

This step restores the SP 5.0 designs, graphics, images, and signatures to the SP 6.1 File Server computer.

**Note:** *If you backed up to a CD, you will need to change the attribute from read-only after you restore.*

### ► To restore designs, graphics, images, and signatures:

1. Copy the designs from the SP 5.0 backup source into the Designs folder on the SP 6.1 File Server computer.

**Note:** *If you had a previous version of badge designer that created files with a .gdr extension, you will be prompted to save the file as a .dgn when you edit a badge design for the first time.*

2. Copy the graphics from the SP 5.0 backup source into the Graphics folder on the SP 6.1 File Server computer.
3. Copy the images from the SP 5.0 backup source into the Images folder on the SP 6.1 File Server computer.

4. Copy the signatures from the SP 5.0 backup source into the Signatures folder on the SP 6.1 File Server computer.

## 9. Activate *Enable Unique & Required Employee Number*

During the process of converting a database, the system checks for possible blank or duplicate employee numbers in the database.

### ► Log on and open the Parameter Form to display the Settings tab:

1. If the **Enable unique & required Employee Number** check box is selected and unavailable, all converted Person records have unique employee numbers. All future Person records must have a unique employee number before the record can be saved. Proceed to [10. "Upgrade Client Computers" on page 112.](#)
2. If the **Enable unique & required Employee Number** check box is NOT selected, this is an indication that duplicate or blank employee number records exist in the database.
3. At this time, you have the option to choose one of two preferences:
  - Do nothing and continue to allow blank or duplicate employee numbers in Person records (the **Enable unique & required Employee Number** check box remains clear).OR
  - Set a control that requires all Person records to have an entry in the **Employee number** field.
4. If you choose to require all Person records to have a unique employee number, select **Enable unique & required Employee Number** and click **Save**.

**Result:** A message displays informing you: **The Employee number field on the Person Form will be required and unique. Once this is enabled, it cannot be changed back. Do you want to continue with this change?**

5. Click **Yes**.

**Result:** A second message displays: **Could not enable unique and required Employee number. Duplicates already exist or field is empty in the database. Refer to the Diagnostic Logfile.**

6. Navigate to the logfile. The message in the logfile informs you that Secure Perfect generated a text file and placed the file in the Logs folder of the Secure Perfect Server computer.
7. Navigate to the Secure Perfect\Logs\DuplicateEmployeeNumbers.txt file, consult the list of duplicate or blank employee numbers, locate those Person records, and assign a unique employee number to each.
8. When all records on the .TXT file list have a unique employee number, return to the **Parameter Form**, select the **Enable unique & required Employee Number** check box, and **Save**.
9. If you cannot save and again receive additional messages, you must repeat the process, steps [5](#) through [8](#).

10. The selection to require all Person records to have a unique employee number cannot be reversed and all newly added Person records must have a unique employee number.

## 10. Upgrade Client Computers

Now that you have upgraded your Server computer, you will need to upgrade all networked client computers (those that are running as client to the database Server computer.) Refer to [“Upgrading Client Computers” on page 112](#).

Once you have finished upgrading your client computer, you will need to identify and flash your micros with application code.

## 11. Put Micros Online and Flash Micros with Application Code

SP 6.1 software will communicate with micros flashed with 5.x firmware. All offline badge and alarm transactions will be uploaded to the Server after the conversion process and stored in the appropriate history table. Allow all the offline transactions to be processed **before** flashing micros to the 6.1 firmware to minimize data loss. The duration of time that the upload will take is dependent on the number of transactions stored and the length of time that the Server was not communicating with the micros. This might be a few minutes or several hours.

Refer to the Secure Perfect Online Help, Micro Utility Toolbar for instructions to flash your micros with eFlash.

## Upgrading Client Computers

If you have networked computers running as SP3.1, SP 4.0, or SP 5.0 clients, you will need to upgrade the client computers now. SP 6.1 supports client computers running Windows 2000 Professional, Windows XP Professional, Windows 2000 Server or Windows 2003 Server. You may want to review your Secure Perfect 6.1 architecture for the options available. Refer to [“What’s New in Secure Perfect 6.1?” on page 1.7](#) of the *Secure Perfect 6.1 Installation Manual* for a description of the new architecture.



*You MUST have the SP 6.1 Database Server computer set up and running before you attempt to install SP 6.1 on the client computers!*

The process of upgrading client computers observes a specific sequence of steps. Each step is detailed in the sections that follow.

1. [Stop Services on Client Computer \(page 113\)](#)
2. [Uninstall Imaging Software - SP3.1 Clients Only \(page 113\)](#)
3. [Install Secure Perfect 6.1 Software \(page 114\)](#)



## 1. Stop Services on Client Computer

Before proceeding, the Secure Perfect services must be stopped.

➤ **To stop services on the client computer:**

1. Click **Start, Settings, Control Panel, Administrative Tools**, then **Services**.

**Result:** The **Services** window displays.

2. Locate the three **Secure Perfect** services:

Secure Perfect Diagnostics  
Secure Perfect Manager  
Secure Perfect System Manager

You will need to scroll down.

- If the **Status** columns are blank, then the services are not running and do not need to be stopped.
  - If the **Status** columns display **Started**, then the services are running and need to be stopped.
3. Select **Secure Perfect Diagnostics** service and click **Stop**. Stopping the **Diagnostic** service will stop the **Manager** and **System Manager** services as well, if **Yes** is clicked on the **Stop Other Services Window**.
- Result:** The **Status** columns should now be blank.
4. If the **Secure Perfect API** service is running, stop that service now.
  5. Exit the **Services** application.

## 2. Uninstall Imaging Software - SP3.1 Clients Only

➤ **To uninstall the Imaging Software on an SP3.1 Client:**

1. Click **Start, Settings, Control Panel**, then **Add/Remove Programs**.
2. On the **Add/Remove Program Properties** page, select **Imaging Option 1.2**.
3. Click **Change/Remove**.
4. On the **Choose Setup Language** page, select **English**.
5. Click **OK**.

**Result:** The **Install Shield Wizard** progress screen displays.

6. You will receive a **Confirm File Deletion** popup. When asked, **Do you want to completely remove the selected application and all of its components?** click **OK**.

7. You will receive a **Maintenance Complete** screen, **Install Shield Wizard has finished performing maintenance operations on Imaging Option 1.2**. Select **Yes** to reboot your computer at this time. Click **Finish**.

**Result:** You are returned to the **Add/Remove Programs** screen. Your system reboots at this time.

### 3. Install Secure Perfect 6.1 Software

► **To install SP 6.1 software:**

1. You **MUST** be logged in as the local administrator user. If not, log out and log back in as an administrator with full permissions.
2. Insert the SP 6.1 CD into the CD-ROM drive.
3. If using the typical installation procedure, review [Chapter 9 - Installing Secure Perfect 6.1 Software on Additional Clients](#) of the *Secure Perfect 6.1 Installation Manual*. Then follow the instructions in the order listed.

If taking advantage of the SP 6.1 features, review your selection of options for installing the Secure Perfect components.

4. Open and log in to the SP 6.1 client program.

***Note:** Versions of Secure Perfect 4.0 and earlier did not require case-sensitive default login passwords. When upgrading from a version of Secure Perfect 4.0 or earlier, you may experience a problem logging in. If you have never changed it, your Secure Perfect default password may be set to initial caps, as in 'Master' and not 'master.'*

## Configuration Notes - Ensuring Success

Here are a few pointers for a most efficient transition to SP 6.1:

- ☐ When your SP 6.1 system is fully converted and upgraded, log in to the Secure Perfect application as one of your previously defined operators.
- ☐ If you need to change the host for each micro, you will need to change this assignment by taking the micros offline and selecting **Micro** from the **Device** menu, then completing the change on the **Micro Form, Micro Definition** tab. Select a **Host Computer** from the drop-down list.
- ☐ If you are changing a Micro/5-PX to a Micro/5-PXN, follow these steps:
  1. Select **Devices**, then **Micro**. The **Micro Form** opens with the **Micro Definition** tab displayed.
  2. Click **Search** for a list of previously defined micros.
  3. From the list of records, select the micro that you are replacing with a Micro/5-PXN.

4. Select the **Micro Type** as **Micro/5PXN**.
  5. Select **Connection type** from the drop-down list as either **Network** or **Network + Dial-up**.
  6. Change the **PC Name**, if applicable.
  7. On the **Port Settings** tab, enter the **IP Address** of your network micro.
  8. **Save** the micro record.
  9. Repeat steps 2 through 8 for all micros that will be replaced by a Micro/5-PXN CPU.
- ☐ Downstream micros do not require reconfiguration since they will automatically inherit the connection type and port settings from the head-of-line micro.
- ☐ If you need to reconfigure the layout of your system where you are breaking a line of micros and creating multiple head-of-line Micro/5-PXN micros, you must do the following:
1. Change the **Micro Type** to **Micro/5PXN** and back to **Micro/5PX** so the Head of Line option becomes enabled.
  2. In the **Head of Line**, select **Yes**, then **Micro Type** as **Micro/5PXN**.
  3. Select **Connection type** from the drop-down list as either **Network** or **Network + Dial-up**.

**Save** the micro record, then repeat steps 1 through 3 for each micro that requires a change in configuration.

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**NOTES:**