



ExFlow Upgrade

This document covers some of the questions that needs to be solved and discussed during an ExFlow upgrade with and without a simultaneous NAV upgrade. It also provides a framework for discussing price/cost for that.

To download updated scripts and/or Object sets. Download from [SignUp Partner Portal](#).

The upgrade steps from various combinations of NAV and ExFlow versions are covered in the below matrix. It shows:

- If the current versions has a standardized ExFlow upgrade process.
- Steps involved in the upgrade you are about to do.
- If there is a requirement to go through certain settings after the upgrade.

Latest current version of ExFlow is **ExFlow 5.1**. Consult table below to identify which setups/configurations that are required to upgrade to latest.

	ExFlow Versions			
	346 or earlier	350	4.X	5
NAV5 or earlier	Contact SignUp	Contact SignUp	NA	NA
NAV 2009	Contact SignUp	A + 1,2	NA	NA
NAV 2013	Contact SignUp	A + 1,2	B + 2	NA
NAV2013 R2	Contact SignUp	A + 1,2	B + 2	NA
NAV 2015	NA	A + 1,2	B + 2	B + 2
NAV 2016	NA	NA	B + 2	B + 2
NAV 2017	NA	NA	B + 2	B + 2
NAV 2018	NA	NA	B + 2	B + 2

Letters A/B identify Upgrade Scripts (Page 3+). Number identify required setup (Page 2)

Please use the matrix to analyze what parts of the upgrade process that requires SignUps assistance.

- Code-merge
- Setups in test environment *)
- Upgrade of ExFlow web for test environment
- Data upgrade
- Setups in the production environment *)
- Education of end users in the upgraded environment.
- Support during testing and Go-Live
- Project management

ExFlow Upgrade

In most upgrades, Signup does all or most the above steps, but this varies between upgrades and NAV partners. In many cases, Signups work is in the range of 3-5 days for an upgrade. However, if you define what kind of help you need we can also provide an estimate for Signups work involved.

Setup 1.

In ExFlow 5 run the Wizard Setup in the Default Company to perform the following actions.

- **Activating the company for ExFlow Web functionality**
- **Publishing the Web service**
- **Download ExFlow Components**
- **Setting Up default ExFlow e-mails (SSO Login and Inbox Remainder)**
- **Installing ExFlow NAV Add-ins**
- **Creating and updating Permission roles**

Additional required configurations:

- **Setting up a NAV account for ExFlow Web**
- **Configuring the NAV Service Tier for ExFlow Web**
- **Configuring NAV for SMTP E-mail**
- **Configuring Dynamics NAV Job Queue**

Setup 2.

In ExFlow 5 run the Wizard Setup in the Default Company to perform the following actions.

- **Activating the company for ExFlow Web functionality**
- **Publishing the Web service**
- **Download ExFlow Components**
- **Setting Up default ExFlow e-mails (SSO Login and Inbox Remainder)**
- **Installing ExFlow NAV Add-ins**
- **Creating and updating Permission roles**

ExFlow 5 has two Web options, On Premise and Azure hosted.

- **Migrate Images/files into the database.***
- **For the Azure option the NST needs to be setup/reconfigured. Consult Configuration Manual.****

*Attachments and XML-files are required to be migrated into the database if they are to be access in ExFlow 5. Invoices is optional but however recommended to be migrated into the database. This task is not done automatically as it is in most scenarios not required to do a full migration in a test database.

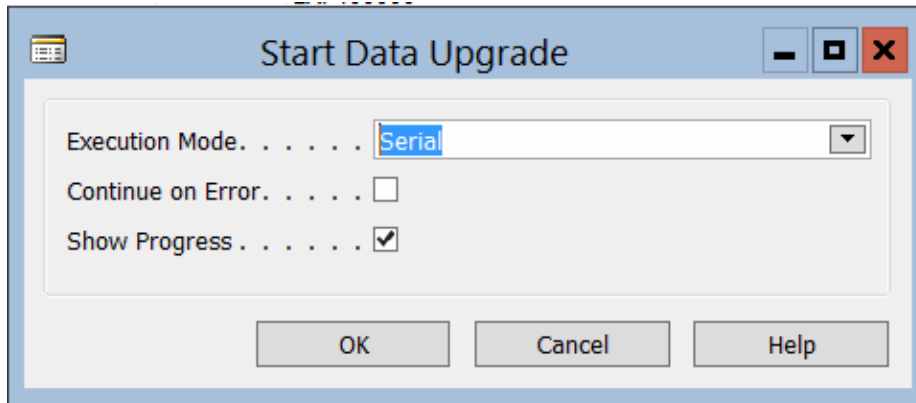
** For information regarding the Azure option send a request to support@signupsoftware.com.

Script A 3.5x to latest release

1. The import document worksheet must be empty in ExFlow for all companies.
2. Before starting the ExFlow upgrade the following tables must be empty in all companies.
 - 12013587 - ExFlow Purch. Document Header
 - 12013588 - ExFlow Purchase Document Line
 - 12013592 - ExFlow Import Attachment
 - 12013648 - ExFlow Purch. Import Header
 - 12013649 - ExFlow Purch. Import Line
 - 12013591 - ExFlow BLOB
 - 12013615 - EX Proposals
3. Import upgrade STEP1 fob
4. Run the Exflow upgrade codeunit
5. Delete all ExFlow-related stored procedures (and views) in SQL server:

1	xf_GetAttachmentPath
2	xf_GetColumnValues
3	xf_GetDocument
4	xf_GetDocumentLineApprovers
5	xf_GetDocumentLines
6	xf_GetLog
7	xf_InsertAttachment
8	xf_InsertDocLine
9	xf_InsertDocLineApprover
10	xf_InsertDocument
11	xf_InsertDocumentLineDimension
12	xf_UpdateDocLine
13	xf_UpdateDocLineApprover
14	xf_UpdateDocLineDimension
15	xf_UpdateDocument
16	xf_SearchDocument
17	xf_ErrorReport
18	xf_v_vendors
19	xf_GetVendorsForAutoComplete
20	xf_Diagnostics
21	xf_UpdateReqStatus
22	xf_GetDocumentLineDimensions
23	EX Document Line\$VSIFT\$8
24	xf_DeleteDocLineApprover
25	xf_DeleteDocLineDimension
26	xf_DeleteDocLines

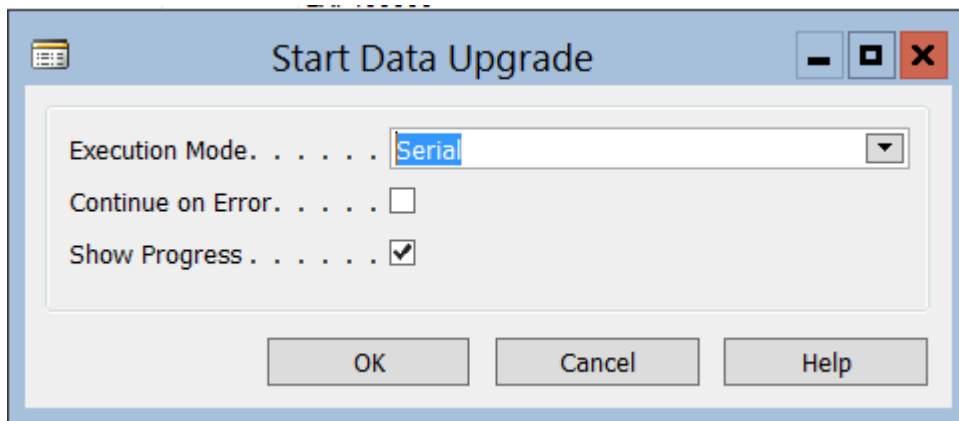
6. Upgrade Dynamics NAV version
7. Merge the new ExFlow objects with the new Dynamics NAV objects
8. Import the new merged ExFlow objects into the upgraded Dynamics NAV environment
9. Import ExFlow STEP2 upgrade fob into the upgraded Dynamics NAV environment
10. Select Tool|Dataupgrade with follow settings



11. The data upgrade is now complete.
12. Validate the ExFlow data
13. Migrate files, instruction found [Here](#)
14. For further steps see document called **ExFlow 5 Configuration Guide.docx** found in the Partner Portal

Script B 4.X to latest release

1. Upgrade Dynamics NAV version
2. Merge the new ExFlow objects with the new Dynamics NAV objects
3. Import the new merged ExFlow objects into the upgraded Dynamics NAV environment
4. Import ExFlow STEP1 upgrade fob into the upgraded Dynamics NAV environment
5. Select Tool|Dataupgrade with follow settings



6. The data upgrade is now complete.
7. Validate the ExFlow data
8. Migrate files, instruction found [Here](#)
9. For further steps see document called **ExFlow 5 Configuration Guide.docx** found in the Partner Portal

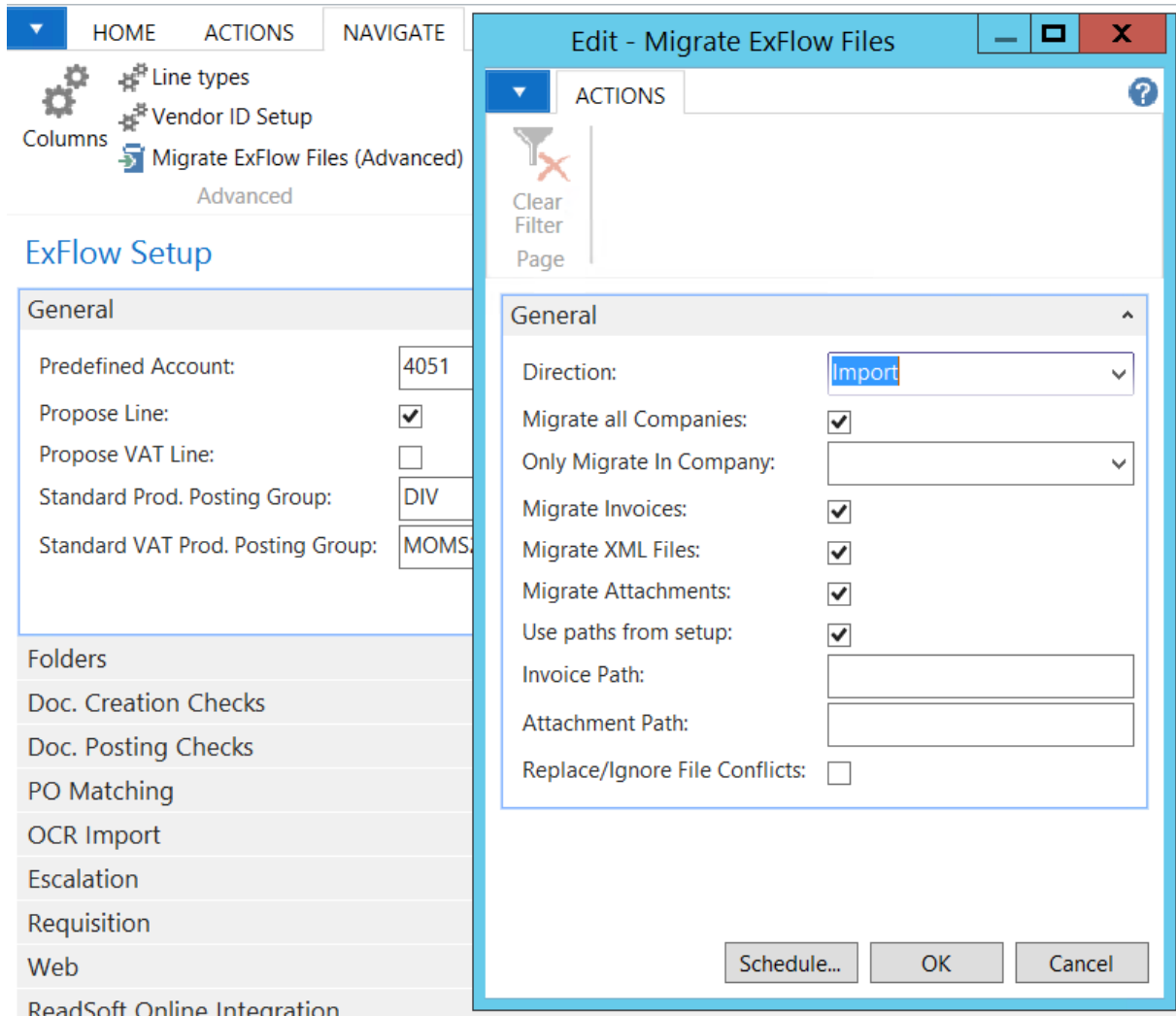
FILE MIGRATION

Migrates Invoice Images, Attachments, and OCR Data files.

Go Company/Departments/ExFlow/Setup -> ExFlow Setup

Tab Navigate

Migrate ExFlow Files.



Options:

Directon: Import/Export

Migrate in All Companies: All ExFlow Companies will be migrated

Only Migrate in One Company: Only the selected company will be migrated.

Migrate Invoices: Invoice Images will be migrated into the system (recommended).

Migrate XML Files: Required for the XML files to be accessible in NAV/Web. However, in many scenarios the OCR XML files are not relevant after the invoice has been posted.

Migrate Attachments: Required if you want the attachments to be accessible in Web/NAV.

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Invoice Path*: Select an Invoice (and XML) root path manually to import files from

Attachment Path*: Import root path for attached files.

**If the setting is left blank it will import according to your ExFlow setup folder settings. Selecting a path manually is often therefore only viable when migrating one company at a time.*

Replace/Ignore Conflicts: If this setting is unticked the migration will be stopped if the system detects missing files or that files/data already exists.