



Dave Yost • Auditor of State

TO: UAN Cemetery Users
FROM: UAN Support
DATE: March 7, 2016
SUBJECT: Cemetery Update Instructions

Overview

This document will guide you through updating your existing UAN cemetery data for use in the new UAN cemetery software, or installing the software to start a new blank cemetery. The steps are:

- 1) **Cemetery Upgrade Key from the UAN Software** (Version 2015.3 or Newer)
- 2) **Cemetery Reports** (Old Software)
- 3) **Cemetery Upgrade Installation disc**
- 4) **AutoPlay and/or User Account Control**
- 5) **Upgrade and/or installation process**
- 6) **Cemetery InstallShield Wizard**
- 7) **Cemetery Setup Wizard**
- 8) **Cemetery Reports** (New Software)
- 9) **Optional – Networking**

Important

Step 1 requires access to your entity's UAN Accounting and Payroll software, version 2015.3 or newer. A user set to the Administrator role must perform Step 1 before the new cemetery software can be used.

Also, the computer on which you will be installing the *new* cemetery software must meet the minimum system requirements listed below. In particular, the computer must have Windows 7 or newer installed.

If you currently use the cemetery software on a computer running Windows XP or Vista, you will move the existing cemetery data to another computer with Windows 7 or newer as instructed during Step 5.

All support for the old cemetery software, including upgrades of any existing data, ends July 1, 2016.

Minimum System Requirements

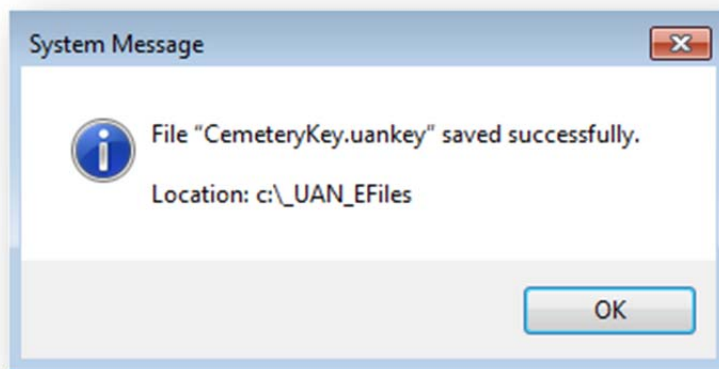
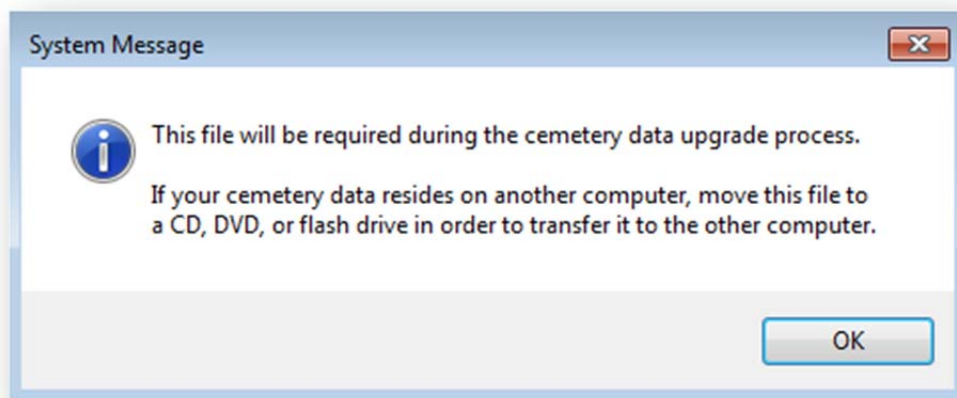
- Windows 7 or newer (XP and Vista are **NOT** supported)
- 2GB RAM or greater
- SQL Express 2012 or newer if SQL is already installed
- 5GB HDD free

1) Cemetery Upgrade Key from the UAN Software (Version 2015.3 or Newer)

In the UAN Accounting & Payroll Software, go to **General > Maintenance > Entity Setup**. Note that only users set to the Administrator role have access to the Entity Setup area.

Click the **Modules** tab, then click **Generate Upgrade Key** near the center of the screen. The Generate Upgrade Key button is only available in UAN version 2015.3 or newer.

You will see the following messages. Click **OK** on both.




2) Cemetery Reports (Old Software)

If you will be upgrading existing cemetery data, save the following reports to PDF for later verification. You may elect to print rather than saving as PDF, but if you encounter conversion errors in **Step 5** of these Cemetery Update Instructions you will have to print the reports again after correcting the errors.

Report List

- 1) Cemetery Summary
- 2) Grave Listing
- 3) Occupied Graves
- 4) Grave Sales
- 5) Bequest - Detail
- 6) Military Veterans

Steps to Quickly Save Old Reports to PDF

- 1) Select all listed items and click **Process**
- 2) Click the **Screen** button and click **Ok**
- 3) Click the  icon (top left of the report viewer)
- 4) Type the report name in the Save As box
- 5) Click **Process**, then close the report when finished

3) Cemetery Upgrade Installation disc

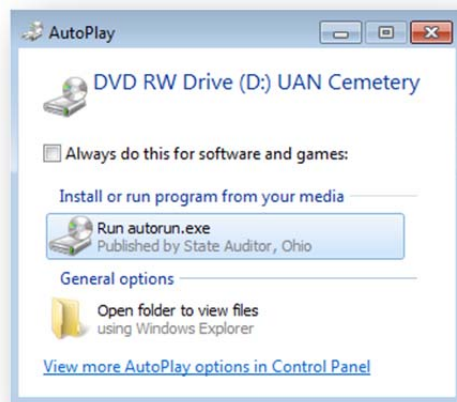
To convert existing cemetery data for use on the same computer or for use on another computer, insert the Cemetery Upgrade Installation disc into the computer on which your cemetery data resides.

To start from scratch with a new blank cemetery instead, insert the Cemetery Upgrade Installation disc into the computer you will be using for the new cemetery software.

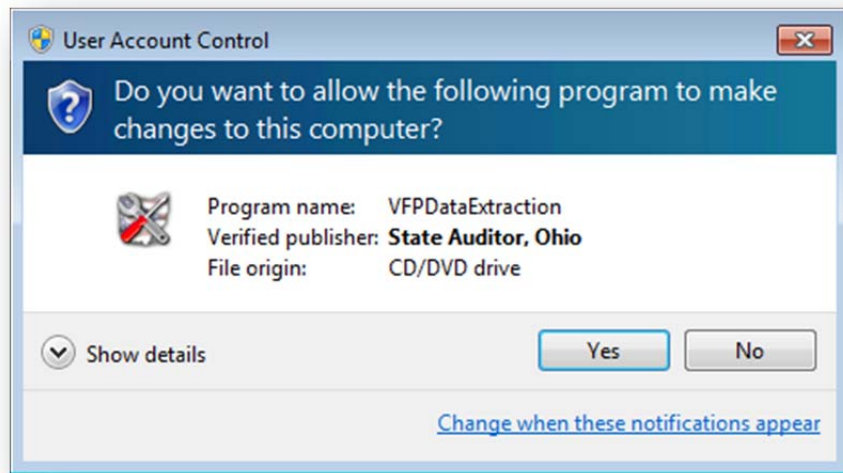
4) AutoPlay and/or User Account Control

After a moment, if the Cemetery Upgrade Installation disc was inserted into a computer running Windows Vista or newer, you may see the following AutoPlay and/or User Account Control messages. If the computer is running Windows XP, you may not see any of the following messages.

WINDOWS VISTA OR WINDOWS 7

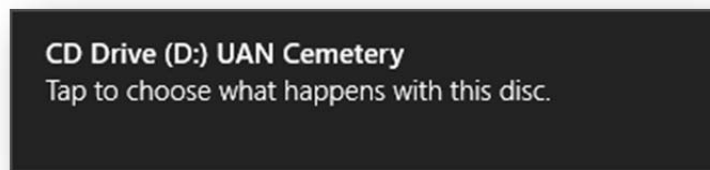


Click **Run autorun.exe** and the following message may appear.

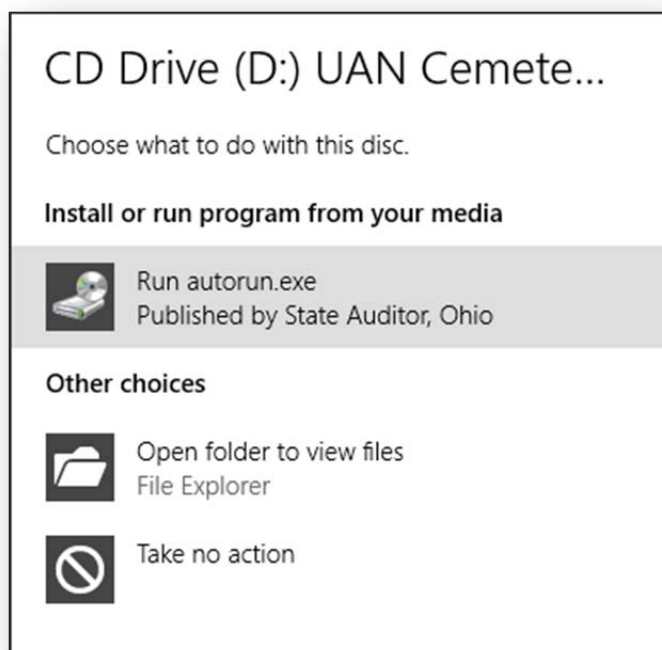


Click **Yes**.

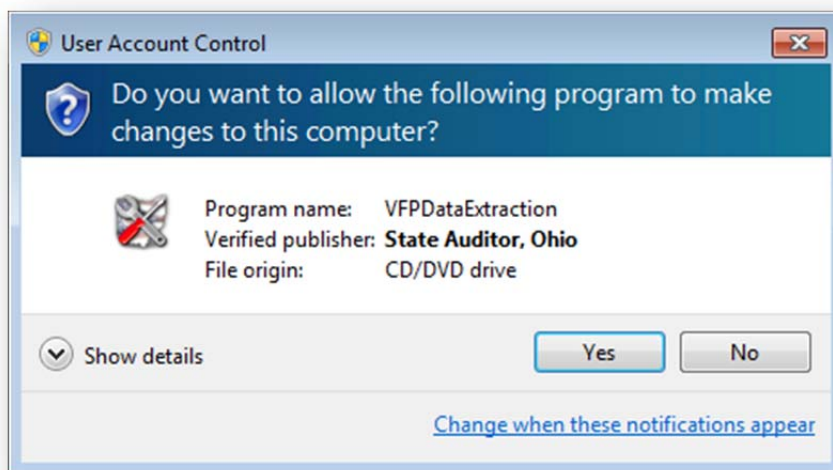
WINDOWS 8



Quickly click the **Tap to choose...** box and the following message will appear.



Click **Run autorun.exe** and the following message may appear.



Click **Yes**.

After a moment, a UAN Cemetery Installation window should appear.

To convert existing cemetery data for continued use on the same computer, select option **A**.

To convert existing cemetery data for use on another computer, select option **B**.

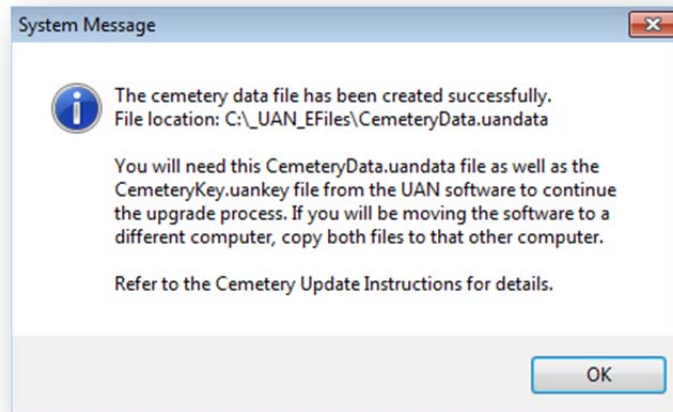
To start from scratch with a new blank cemetery, select option **C**.

5) Upgrade and/or installation process

Click the **Start** button at the bottom right of the UAN Cemetery Installation window.

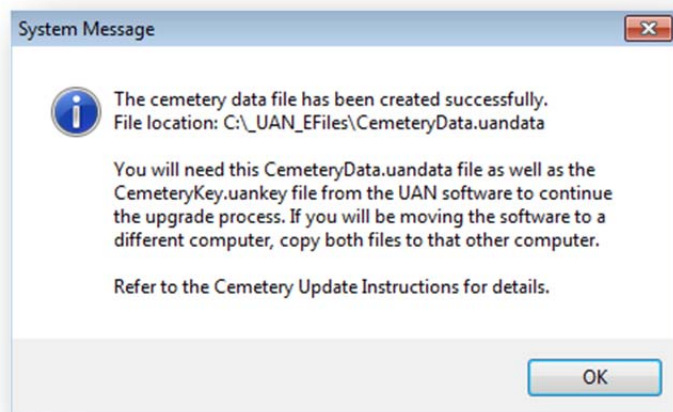
To convert existing cemetery data for continued use on the same computer, follow step **5A**.
To convert existing cemetery data for use on another computer, follow step **5B**.
To start from scratch with a new blank cemetery, follow step **5C** (page 8).

- 5A) Convert existing cemetery data for continued use on the same computer**
After a while you will see the following message. Click **OK**.



You may then see various other Microsoft installation messages. Continue to **Step 6** (page 8).

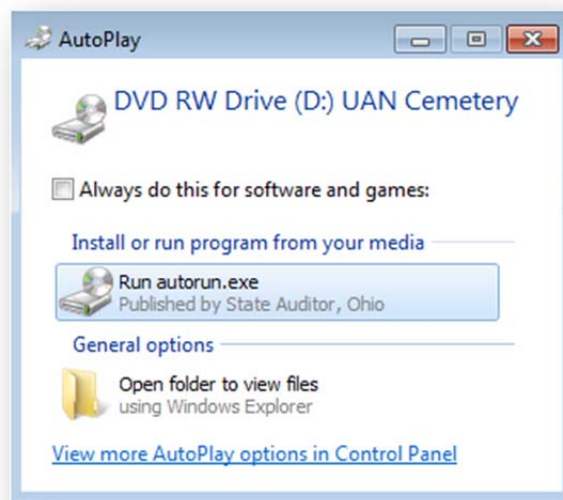
- 5B) Convert existing cemetery data for use on another computer**
After a while you will see the following message. Click **OK**.



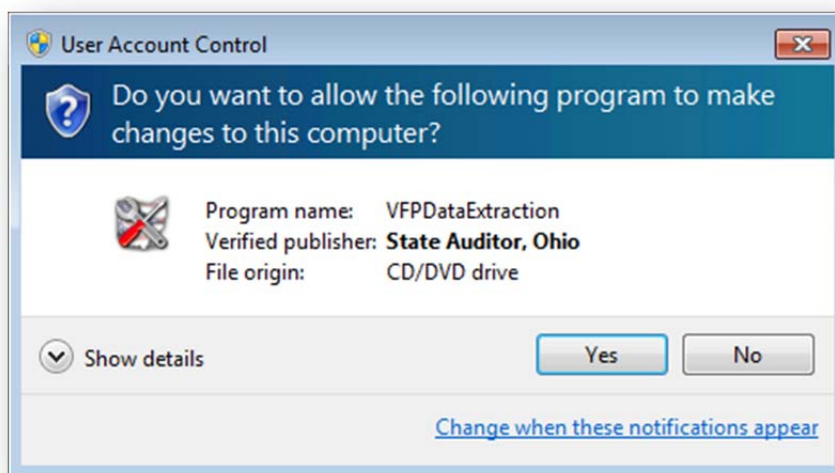
Copy CemeteryKey.uankey and CemeteryData.uandata to the computer you will use for the new cemetery software, and insert the Cemetery Upgrade Installation disc into that computer.

After a moment, you may see the following AutoPlay and/or User Account Control messages.

WINDOWS VISTA OR WINDOWS 7

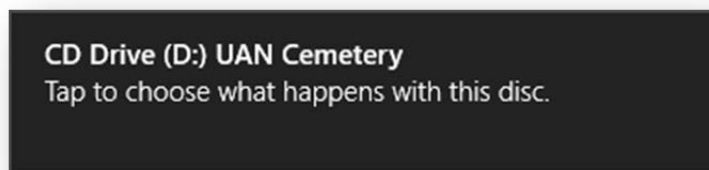


Click **Run autorun.exe** and the following message may appear.

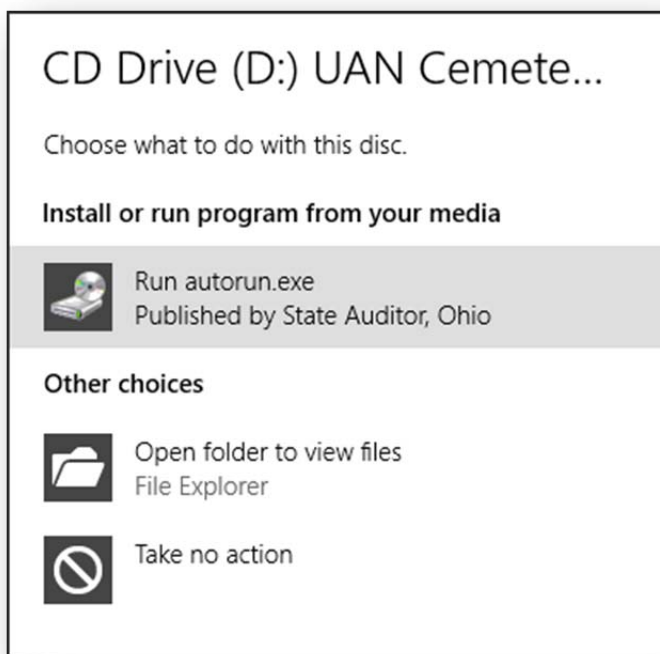


Click **Yes**.

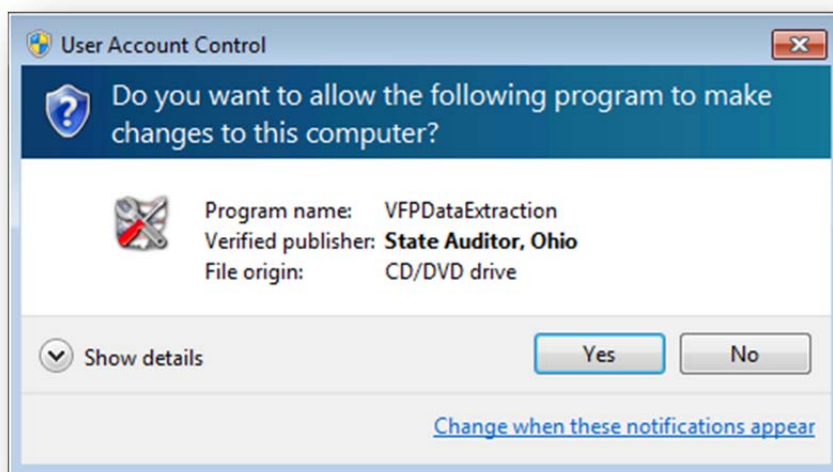
WINDOWS 8



Quickly click the **Tap to choose...** box and the following message will appear.



Click **Run autorun.exe** and the following message may appear.



Click **Yes**.

After a moment, a UAN Cemetery Installation window should appear.

Select option **C** and click the **Start** button at the bottom right of the window.
You may then see various Microsoft installation messages. Continue to **Step 6**.

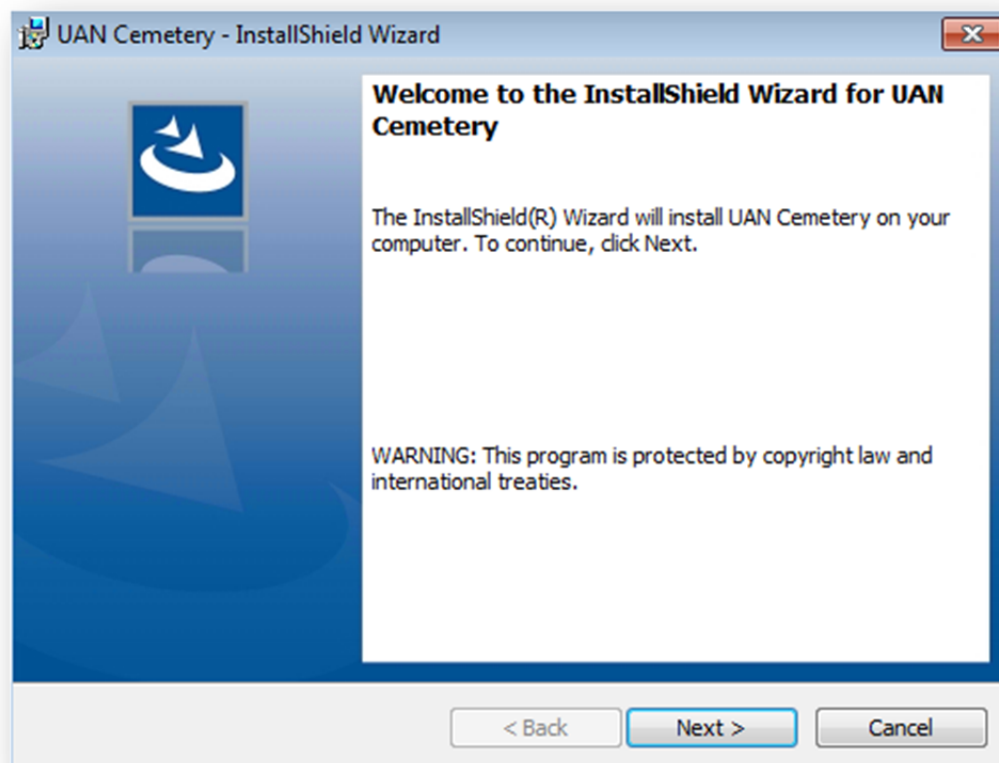
5C) Starting from scratch with a new blank cemetery

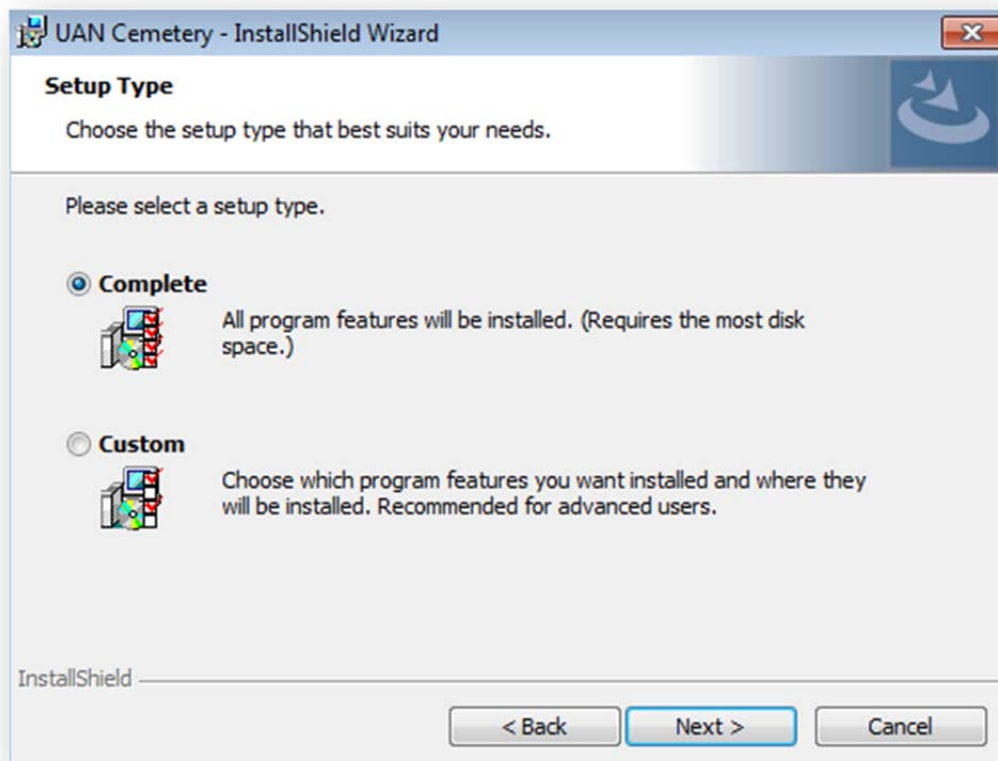
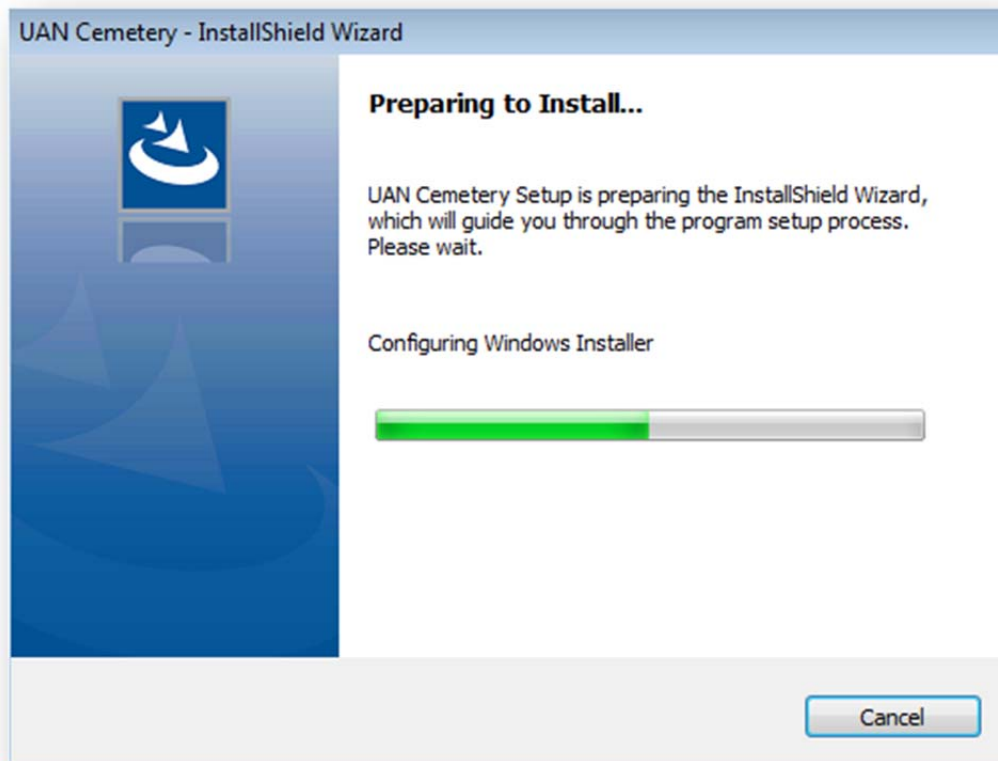
You may see various Microsoft installation messages. Continue to **Step 6**.

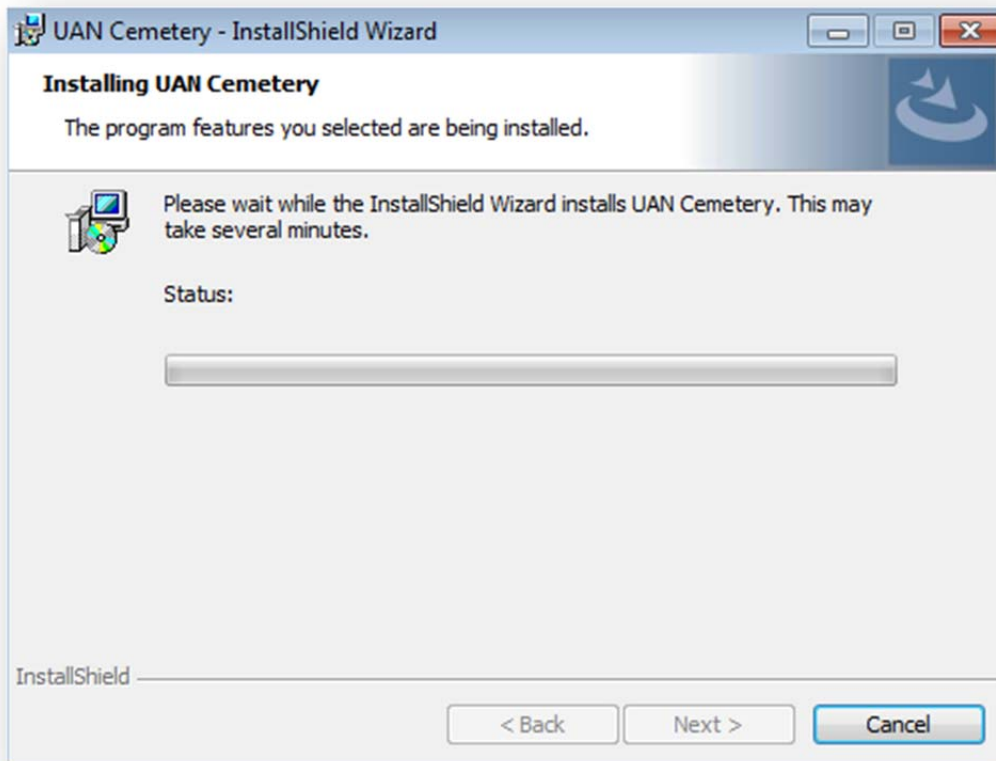
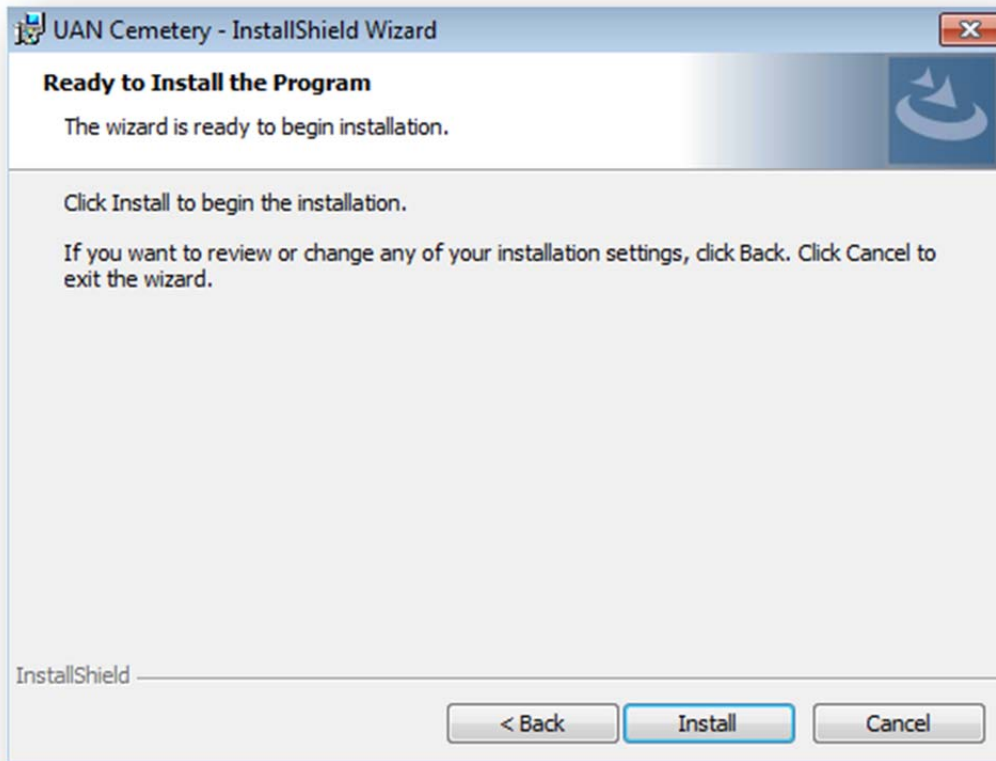
6) Cemetery InstallShield Wizard

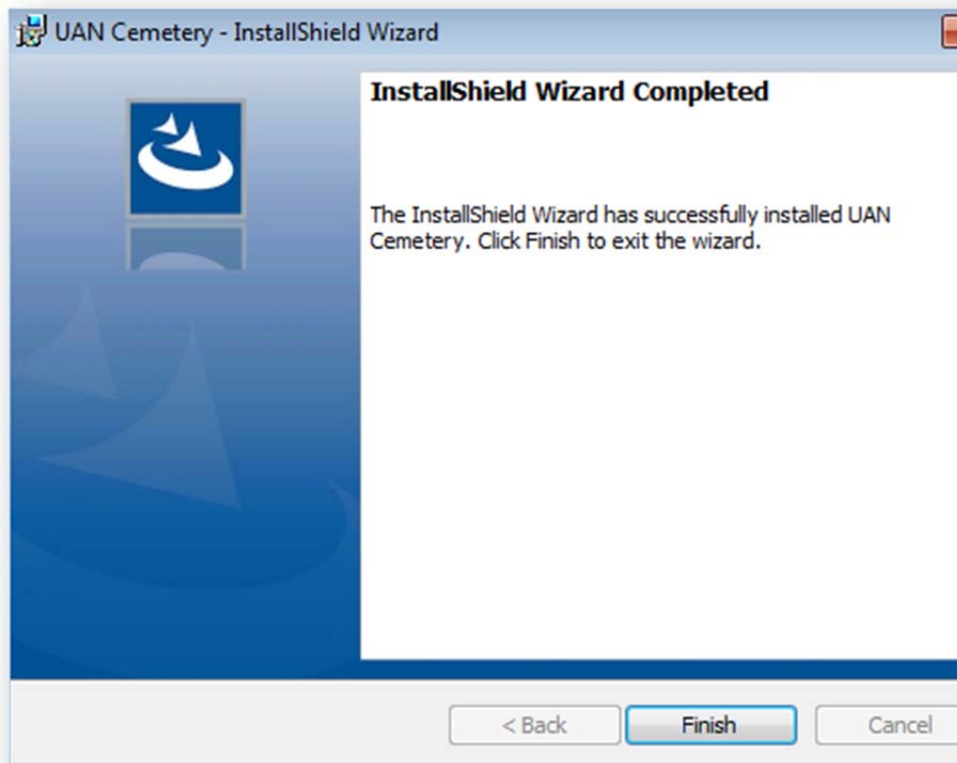
You will see a series of UAN Cemetery – InstallShield Wizard prompts.

Click **Next**, **Next**, **Install**, and eventually **Finish**, as shown on the following pages.









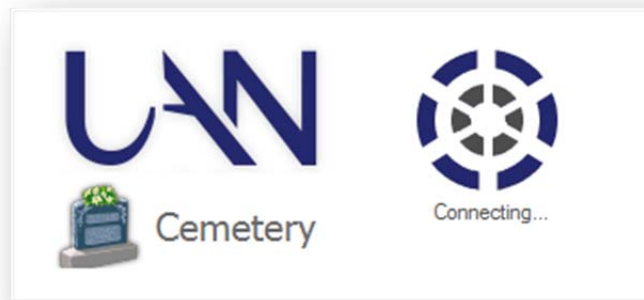
7) Cemetery Setup Wizard

A shortcut labeled Cemetery will be placed on your Windows desktop, as pictured:

Double click this shortcut to initiate the cemetery setup wizard. *Note that this is the same icon you will use to open the cemetery software after setup is completed.*



The cemetery setup wizard will appear after the following "Connecting" window.



Follow the instructions at the top of the Cemetery Setup Wizard window, clicking Next after each step.

Step 1 of the setup wizard will require the key file CemeteryKey.uankey generated from the UAN Accounting and Payroll software during **Step 1** of these Cemetery Update Instructions. If you are not using the new cemetery software on the same computer as the UAN Accounting and Payroll software, you will need to retrieve that file from C:_UAN_EFiles on the UAN computer. Copy or move the key file to the cemetery computer, then click **Browse** to locate and select the file.

Step 2 will request the data file CemeteryData.uandata generated during **Step 5** of these Cemetery Update Instructions **if you are converting existing cemetery data** – click **Browse** to locate and select the data file. **If you are starting with a new blank cemetery**, you will *not* need a data file for Step 2 – instead, switch the selection on this step to “Empty cemetery (no grave or burial data)”.

Step 3 allows you to verify your entity information. This includes adding, editing, or deleting cemetery officials, setting default deed formatting, and choosing whether to enforce periodic data backups. These settings can also be modified later, in **Maintenance > System > Entity Setup**.

Step 4 allows you to merge wars that have unnecessary duplicates in the system. This is important for accurate reporting of veteran service. Refer to the instructions at the top of the screen for assistance.

Step 5 requires you to select a user name for the cemetery software administrator. Every time you open the cemetery software to log in, you will type this exact name. Choose a user name that uniquely identifies you, AND that will be easy to remember and type correctly! If desired, additional users may be added after the setup process is complete, in **Maintenance > System > Users**.

After entering your user name, click **Finish**.

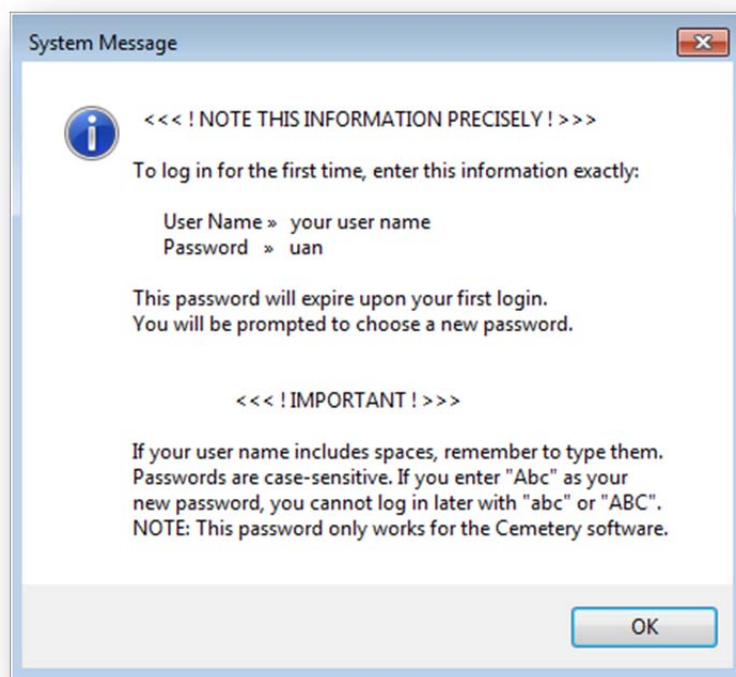
If you are converting existing cemetery data, you will see the following message on the bottom left of the setup wizard. This may take a while if you have thousands of graves – please be patient.

If you are starting with a new blank cemetery, you will *not* see this message.



Converting Plots and Burials, Please Wait...

The following prompt will appear.



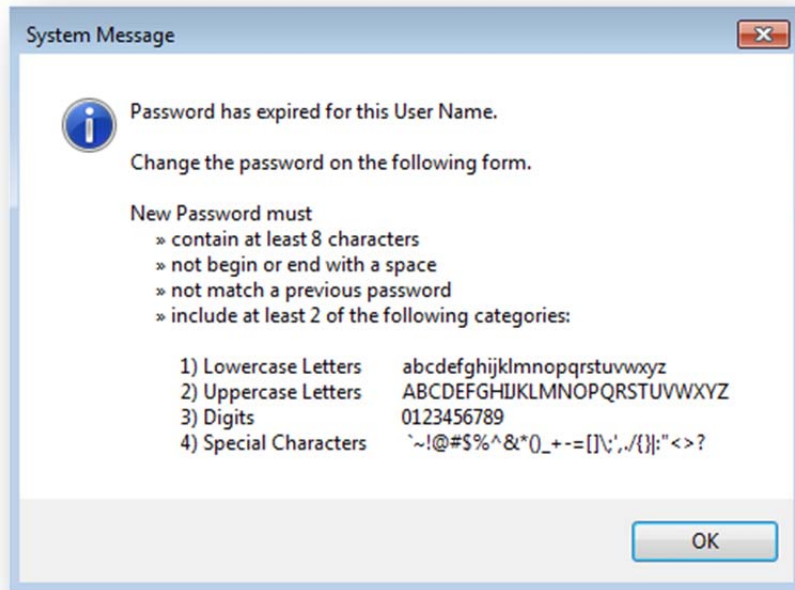
Click **OK**.

The login form will then appear. (You will see this form every time you open the cemetery software)

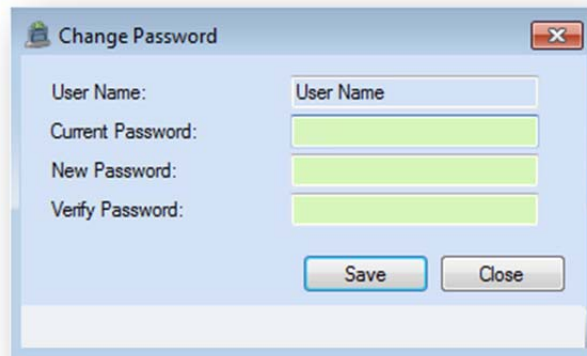


Enter the user name you created in Step 5 and the password “**uan**” (without quotes), then click **OK**.

Next you will see a message explaining the requirements for choosing a new password, as follows.



Click **OK**. The Change Password form will appear.



Enter **“uan”** in the Current Password box (without quotes), then enter your new password in both the New Password and Verify Password boxes. Your password will be case sensitive (i.e. “cat” is *not* the same as “Cat”) but your user name is not. After entering your new password, click **Save**.

The user name and password you establish for the UAN Cemetery software are entirely independent of any user names and passwords you may be using in the UAN Accounting and Payroll software. Therefore if you establish a new user or change a password in one of these applications, it will have no effect on the users and passwords in the other application.

After you have saved your new password successfully, setup is complete and the new UAN Cemetery software will open automatically. In the future, every time you open the Cemetery

icon you will use the same User Login form that you saw previously during the setup process.

8) Cemetery Reports (New Software)

If you upgraded existing cemetery data in **Step 5** of these Cemetery Update Instructions, save the following reports from the new cemetery software to PDF. You may elect to print rather than saving as PDF, but some of the reports may require large amounts of paper.

NEW Software Report Path	NEW Software Report Name	OLD Software Report Name	Notes
Bequest Reports	Bequests	Bequest - Detail	Verify all information.
Cemetery Summary Report	Cemetery Summary	Cemetery Summary	Verify all information. ("Sold" is now "Purchased")
Grave Reports	Graves Listing	Grave Listing	Verify total graves per cemetery listed at bottom.
Grave Reports	Graves Occupied Summary	Occupied Graves	Verify total occupants per cemetery listed at bottom*.
Sales and Fees Reports	Sales	Grave Sales	Verify total graves and sales per cemetery listed at bottom.
Veteran Reports	All Veterans	Military Veterans	Verify occupants and wars.

Compare the new reports to those you saved or printed from the old cemetery software as shown above to ensure that the data conversion was successful. If any of the information does not match from the old reports to the new, contact UAN Support for assistance at 800-833-8261.

** Some entities may have received a message during **Step 5** of these Cemetery Update Instructions stating that one or more occupied graves were structured in such a way that the Occupied Graves report in the old cemetery software was not properly including them. If you received that message, the total occupants on the old Occupied Graves report will be less than on the new Graves Occupied Summary. This is not a problem.*

9) Optional – Networking

If you plan to use the cemetery software on a new or existing network, please contact UAN Support for technical setup assistance at UAN_Support@OhioAuditor.gov or 800-833-8261.