POS 6.3 OCS Migration Rules for devices currently using Coordination Services

Background

This document applies to sites with multiple devices connected using Coordination Services. Coordination Services allow bins across multiple devices to sync, making manifesting from one device possible.

One exciting new feature in POS 6.3 is Online Coordination Services (OCS).

This new feature moves the coordination services function from being hosted locally by a Windows host machine, to being hosted on a cloud (internet) database (OCS). This means you will no longer need a Windows host machine following the upgrade to POS 6.3. This also means your bin data will be stored securely on cloud and removes the chances of data loss if your POS device is damaged or lost.

It is important that Operators follow these instructions to ensure migration success and minimise interruptions.

Pre-requisites

Before starting the upgrade to POS 6.3 please ensure you have the following:

1. Choose a time outside of trading hours to complete the upgrade to all devices.

2. All POS devices must be connected to the internet during the upgrade and migration process.

3. Do not enter transactions or print manifests during the upgrade to any device. All POS devices should be upgraded before normal Bin Management can resume.

4. The first POS device to migrate (ideally the most frequently used) will become the 'Source of Truth' for your OCS database. Before you start the update, make sure this device is properly synchronized and showing all the current bins in the "Bin" tab, as all other devices will defer to this device to source their data for migration. Once Migration has completed the OCS Database itself becomes the 'Source of Truth' not a particular device.

5. We recommend taking photos or taking notes of your current bins in the "bins" tab (including the containers count) before starting the update so

you can make sure no data was lost during the upgrade.

Steps to migrate bin information to the online database

1. Download the latest POS version on your first POS device.
   - In-App upgrade from the POS home screen (for devices on version 6.1), or
   - Business Portal Download (for new devices only or Devices with POS version 5)
2. Run the POS upgrade process. Refer to the **POS 6.3 installation Guide** for detailed installation steps.
3. Upgrade completes
4. OCS should be automatically enabled for your device & site.
5. Repeat steps 1- 4 for all other devices.

Things to look out for following install

1. OCS will attempt to upload everything it can from a device once it is upgraded. If it finds a duplicate bin on a device that already exists in OCS database, it will ignore it.
2. After the first device is migrated all remaining devices for a site will attempt to upload their bins, ignoring ones that have already been uploaded.
   a. Bin Asset ID is the defining factor, if this is changed prior to migration it may result in duplicate bins.
3. Pre-existing Duplicate bins will still exist after OCS Migration. These bins will need to be manually moved to their appropriate status to resolve.
   a. e.g. 2 Active Glass Bins in same Bay with different Asset IDs.
4. Any transactions completed on devices that have not yet migrated will result in lost transaction quantity in the bins.
   a. The transaction itself will still be successful, but the quantity in the Bin will be lost when it does eventually migrate, which could result in your manifest being incorrect.
5. Changes to the status or details of a Bin on secondary device will be lost if that site has already migrated a device.
6. If there is a conflict in status, it will always take OCS as source of truth.
7. If there are 2 bins of the same material type in the same bay, transactions will usually go to the first bin shown in the list.
   a. You're better off moving one of the duplicate Bins to Full/Closed before doing a transaction if you are unsure where the quantity will go.
8. Usually hitting the refresh button on all devices will sync the Bins Screen. If this does not work as expected, you can modify the details of a Bin and save, it should then upload to OCS.