Importing Data from easyjob® 3.0 to 4.0

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Getting Started

Over 100 new features/improvements have been added to easyjob 4.0. For a detailed description of what's new, go to www.protonic-software.com

We developed a data import tool to facilitate a seamless transition to easyjob 4.0.

We recommend importing data in two steps

1. First, import the data. Then test the functionality and verify that the data imported properly.
2. Once you've established that the functionality works to your satisfaction, import the data again and begin working live with easyjob 4.0.

System Requirements for easyjob 4.0

Upgrading older hardware may be required to take advantage of easyjob 4.0's advanced and wide-ranging features.

easyjob 4.0 upgrade procedure

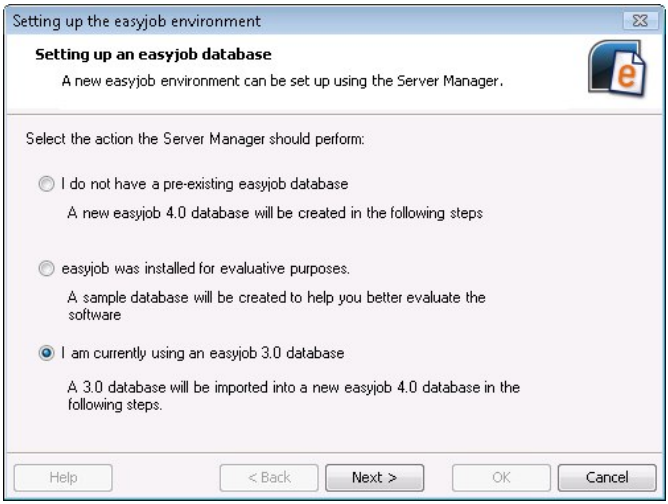
For the best possible upgrade experience, follow these steps in the order they appear.

Install easyjob 4.0 on the Server and Workstations

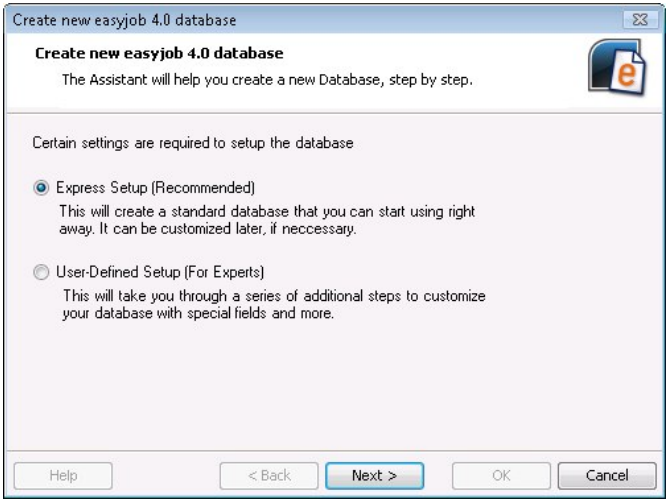
easyjob 4.0 can be installed while easyjob 3.0 is still running, so that your operation is not interrupted during the upgrade. Install easyjob 4.0 on the server and workstations. You may have to temporarily deactivate your firewall. Follow the Installation Assistant's instructions. The latest database version (Microsoft SQL Server 2005 Express Edition) will be installed on the server computer.

Importing Data from easyjob 3.0

The easyjob 3.0 database will be imported into easyjob 4.0 via the Server Manager. Start the easyjob Server Manager on the Server Computer.
Upon the first start, you will be asked about your environment. Select import easyjob 3.0 database.

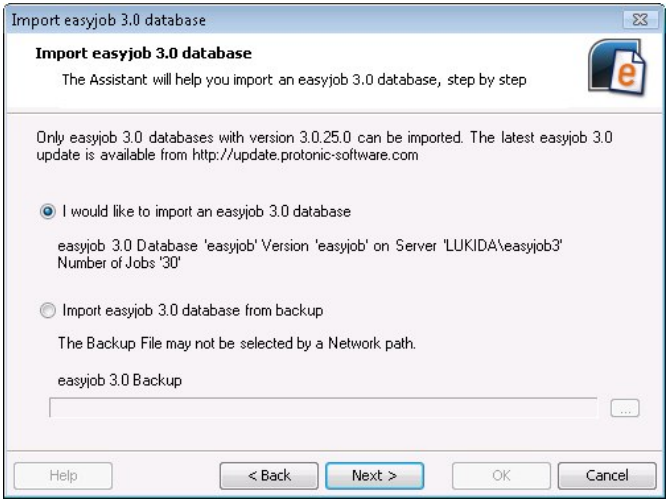


In the first step, the Server Manager will create a new database. Proceed with the default settings.

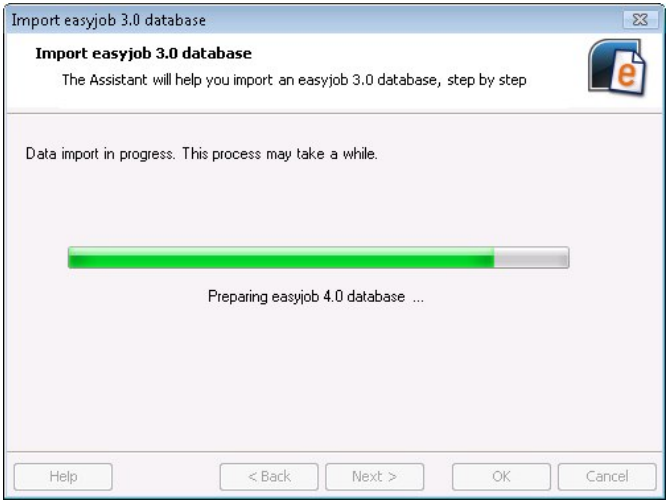


After creation of the database, an existing database will be imported. The assistant will recognize If an easyjob 3.0 database is installed on the server and you can proceed directly with the data import process.
easyjob will create a backup of the easyjob 3.0 database and will import it along with the report files.

If the database is installed on another computer, you must manually create an easyjob 3.0 backup. Copy the backup on the new computer and select it when prompted by the Assistant.



The Assistant may take some time to import the data.



During the data import, the database will be updated to the latest format and the latest database updates will be installed automatically. The report files will be imported as well.

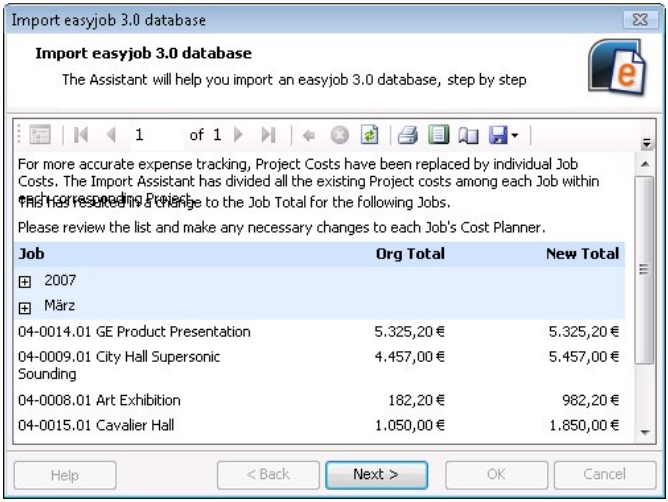
Checking the update

Test your reports after the data import to ensure that they still meet your requirements. The addition of several new fields in easyjob 4.0 may cause some reports to print differently. In particular, check the last line of each report.
If you plan on taking advantage of new features such as "entering-items-as-you-go" in the Bill of Items, a report customization may be required.

Due to the new job costing structure, adjustments will automatically be made to the report files. The variables "TotalCustomerProjectCosts" and "TotalActualProjectCosts" will be replaced with the variables "TotalJobCostsInvoiced" and "TotalJobCostsActual". Since these costs are included in the Job Total, the variable "TotalCustomerProjectCosts" will be replaced with "0" in the formulas to prevent duplicate calculations in the reports.

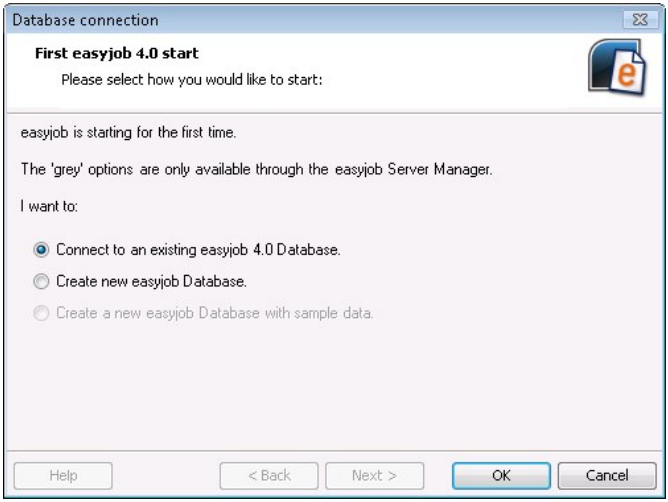
In easyjob 4.0 project costs are assigned to individual jobs. The Import Assistant will automatically assign project costs in the following status type order: Confirmed, Proposed, Canceled and Job Total.
Since easyjob 4.0 takes job costs into account when calculating the job total, the Import Assistant will add the Job Costs to the Job Total.

The Assistant will create a list of Jobs in which the Job Total was adjusted. This list can be saved as a PDF. Check the accuracy of the Job Totals and make any neccessary changes.



In easyjob 3.0 it was possible to create Jobs on the same day leaving the default timeframe at 0:00 to 0:00. Since the difference between these two timeframes is zero, it created some availability conflicts. In easyjob 4.0, you must select an actual timeframe. All same-day Jobs from easyjob 3.0 with this default setting will automatically be extended by one day.

After successfully completing the database import, you can connect the individual workstations to the easyjob 4.0 database.



Verifying success of Data Import

Since easyjob 4.0 can be installed parallel to easyjob 3.0, you have ample opportunity to verify the successful import of your data.

Going live with easyjob 4.0

Once you are satisfied with the results of the data import, you can activate the easyjob 4.0 database and start working with it right away.
After going live, it is imperative that you delete the old easyjob 3.0 database to prevent users from accidently making changes to the wrong database. Changes to the easyjob 3.0 database cannot be imported after the fact.

Uninstall any remaining easyjob 3.0 versions from your workstations.

We wish you great success with easyjob 4.0!