

Upgrade Data to EngineerOffice 2012

A Whitepaper

The following information walks you through the steps of converting your EngineerOffice 2010/2011 data to EngineerOffice 2012 and provides recommendations for post-conversion procedures to ensure data integrity.



The following information is for users who have already installed EngineerOffice 2012. If you haven't installed the software, see the [EngineerOffice 2012 Getting Started Guide](#). Mac users should start with the [Set Up Mac for EngineerOffice 2012](#) whitepaper.

Points to Remember Before Upgrading to 2012

- Uninstalling previous EngineerOffice versions is not required. The 2012 version can reside and run on the same server as your 2010/2011 installation.
- We recommend the EngineerOffice 2012 upgrade be installed on the same server as the 2010/2011 installation but this is not necessary.
- The EngineerOffice 2012 installer doesn't modify the database files of the previous versions during the upgrade process; however, we do recommend backing them up prior to the upgrade.
- Make sure all EngineerOffice users have logged out of the system prior to installing the 2012 version.
- Do not stop your current EngineerOffice server. The 2012 upgrade requires that to be running to locate the data for conversion.
- In some situations, the default contact communication types (i.e., phone number, email address, etc.) do not convert correctly from EngineerOffice 2010/2011. You can set them up again using the Contact > Defaults screen in Preferences.


Upgrade Data to EngineerOffice 2012

You need the following information to convert your old EngineerOffice data to 2012:

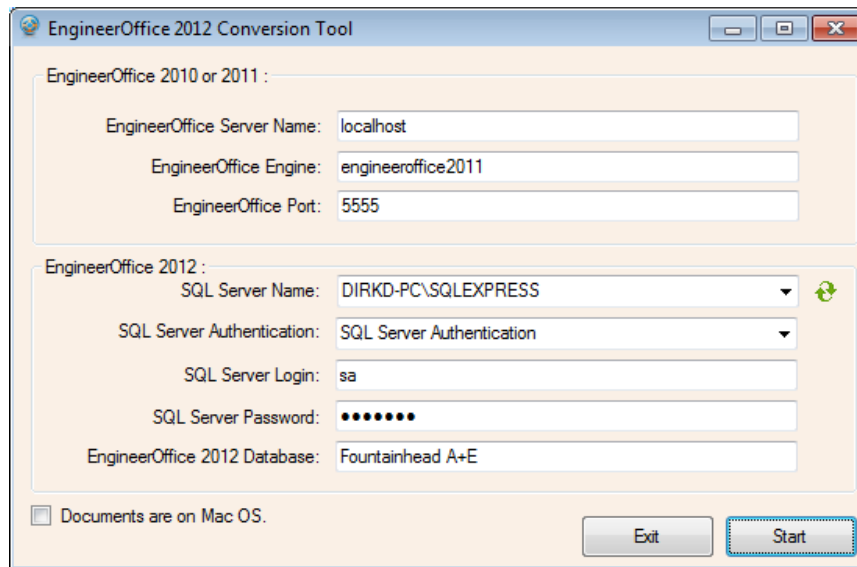
- SQL Server Name.
- SQL Server login credentials (The login ID is always **sa** and that user's associated password).
- EngineerOffice 2012 Database Name.



Do the following to convert your data from EngineerOffice 2010/2011 to 2012.

1. After you have completed the EngineerOffice installation, run the conversion tool. On the EngineerOffice server, select Start menu>All Programs>EngineerOffice 2012>EngineerOffice 2012 Conversion Tool. The EngineerOffice 2012 Conversion Tool displays.


 Run the EngineerOffice conversion tool as a Windows Administrator. Right-click the tool's shortcut and select *Run as administrator*. Click Yes on the confirmation screen.

2. Enter the SQL server name, login ID and password.





 If you forgot the SQL server name, click the *Refresh* icon  next to the SQL Server Name field. It will populate the drop-down field with a list of detected SQL servers.

3. Enter the name of the EngineerOffice 2012 database.

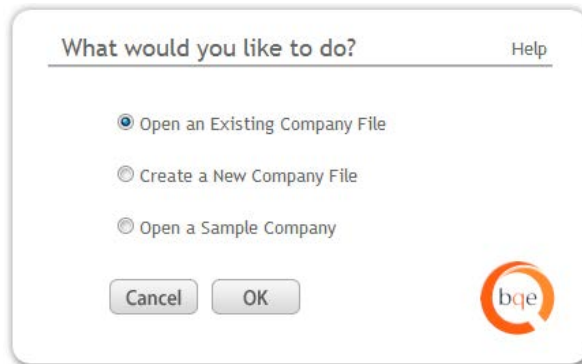
 If this is a new company database, write the name down; you'll need it to open the company database in EngineerOffice 2012.

4. If your EngineerOffice-managed documents are stored on a Mac server, select the *Documents are on Mac OS* checkbox.
5. Click Start.

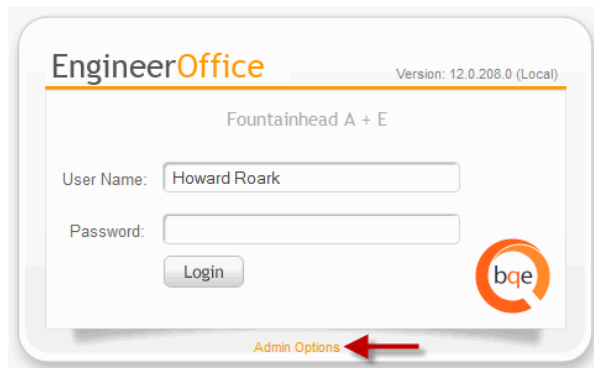
 EngineerOffice creates a log file containing details of the conversion process. When the conversion is completed, you'll be shown the path to the log file for viewing.

 If you need further guidance in setting up EngineerOffice 2012, [please visit our web site Support page](#). If you are experiencing any issues we will be glad to schedule a call and help you resolve them. For technical Support, please call (310) 602-4030 or email support@EngineerOffice.com.


6. Once the data conversion is completed, launch EngineerOffice 2012 and click Admin Options on the login page. You may be prompted with a Windows Administrative login; if so, enter it.
7. Select Open an Existing Company File.



8. Enter the login details for your new company database and click Open.



9. If you want to prevent users from accessing your previous EngineerOffice installation, select Start menu>All Programs>EngineerOffice 2010/2011 | Stop EngineerOffice Application Server.

 If you need further information or troubleshooting tips, you can go to the [BQE Knowledge Base](#).

EngineerOffice V8 Users

EngineerOffice V8 users cannot upgrade directly to the 2012 version. For a pain-free transition to EngineerOffice 2012, we highly recommend using our Data Conversion Services. Our Conversion Team will migrate your v8 data files and return them to you in the EngineerOffice 2012 format.



To get more information on BQE's Conversion Services for upgrading from EngineerOffice v8 to EngineerOffice 2012, please contact us at (800) 371-0130 (ext#0) or support@EngineerOffice.com.