

Whitepaper



Upgrade Data to EngineerOffice 2014

Built With Your Industry Knowledge

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Upgrading Data to EngineerOffice 2014

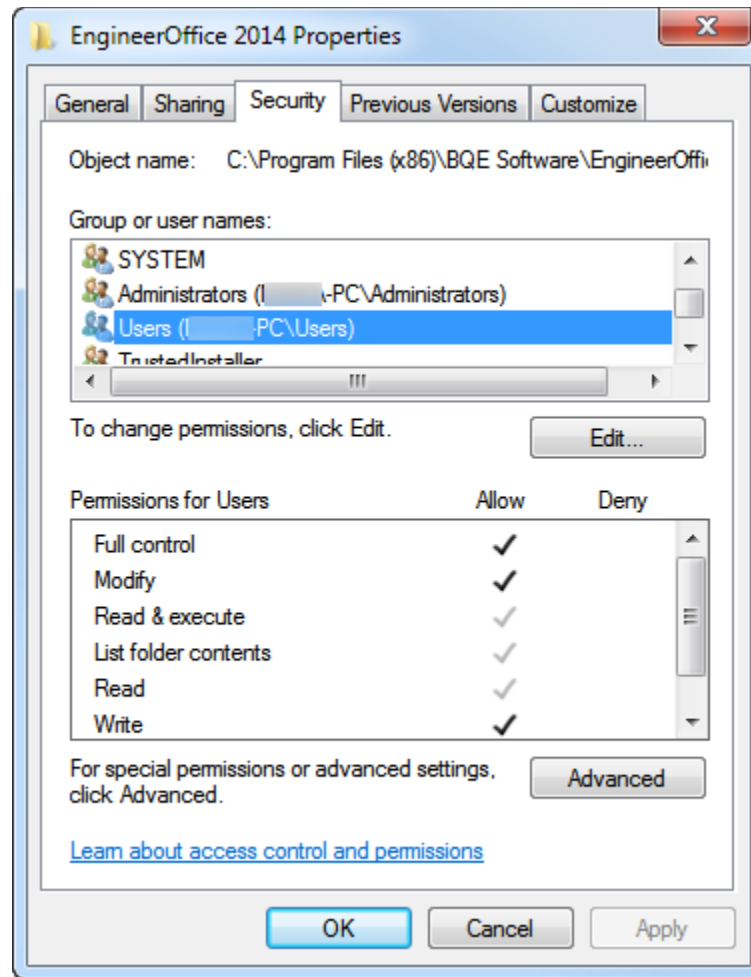
The following information walks you through the steps of converting your EngineerOffice data from previous versions to EngineerOffice 2014 and provides recommendations for post-conversion procedures to ensure data integrity.



The following information is for users who have already installed EngineerOffice 2014. If you haven't installed the software, see the [EngineerOffice Getting Started Guide 2014](#). Mac users should start with the [Set Up Mac for EngineerOffice](#) whitepaper.

Points to Remember Before Upgrading to 2014

- You must identify which version of EngineerOffice you are using. You can find that on the bottom-right of the home page in EngineerOffice v8 and bottom-center of the home page in v2010-2011. In the newer versions, this information is displayed on the top-center of the home page.
- Uninstalling previous EngineerOffice versions is not required. The 2014 version can reside and run on the same server as your 2010-2013 installation. We recommend the EngineerOffice 2014 upgrade be installed on the same server as the 2010-2013 installation.
- The EngineerOffice 2014 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.
- During the data conversion process, your previous settings are migrated to the current version.
- Make sure all EngineerOffice users have logged out of the system prior to installing the 2014 version.
- Do not stop your current EngineerOffice server. The 2014 upgrade requires that to be running to locate the data for conversion.
- If you have older EngineerOffice custom reports (*.rpt) or invoices (*.rpc), they must be manually copied to the **X:\Program Files (x86)\BQE Software\EngineerOffice 2014\public\Reports\Custom** folder (where X = your drive letter).
- If you have EngineerOffice 2010/2011 custom invoices or reports, they must first be converted to the 2014 format by our report writers. Please contact [BQE Technical Support](#) for assistance.
- Release security permissions to **X:\Program Files (x86)\BQE Software\EngineerOffice 2014** for the *Users* group giving it Full Control–Allow. In addition, add Domain Users, if applicable.



Upgrading Data to EngineerOffice 2014

You need the following information to convert your old EngineerOffice data to 2014:

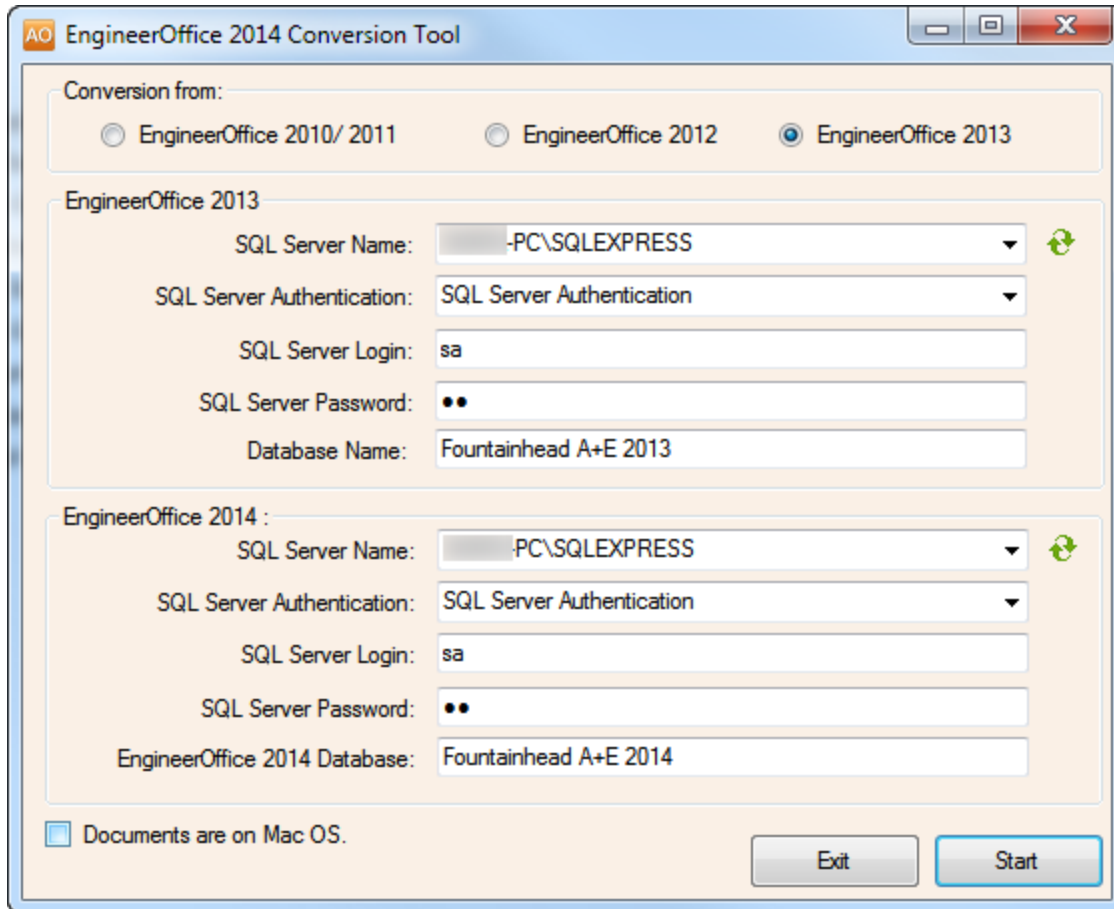
- SQL Server Name
- SQL Server login credentials (The login ID is always **sa** and that user's associated password)
- EngineerOffice Database Name

Do the following to convert your data from EngineerOffice versions 2010-2013 to 2014:

1. After you have completed the EngineerOffice installation, run the conversion tool. On the EngineerOffice server, select Start menu > All Programs > EngineerOffice 2014 > EngineerOffice 2014 Converter. The EngineerOffice 2014 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.




EngineerOffice 2014 Conversion Tool

Conversion from:

☐ EngineerOffice 2010/ 2011 ☐ EngineerOffice 2012 ☒ EngineerOffice 2013

EngineerOffice 2013

SQL Server Name: PC\SQLEXPRESS 


SQL Server Authentication: SQL Server Authentication

SQL Server Login: sa

SQL Server Password: ••

Database Name: Fountainhead A+E 2013

EngineerOffice 2014 :

SQL Server Name: PC\SQLEXPRESS 

SQL Server Authentication: SQL Server Authentication

SQL Server Login: sa

SQL Server Password: ••


EngineerOffice 2014 Database: Fountainhead A+E 2014

☐ Documents are on Mac OS.

Exit Start

2. Choose the version from which you are converting data.
3. EngineerOffice 2010-2011 users can skip to the next step. If you are an EngineerOffice 2012/2013 user, enter the name of the SQL server where your data is located, its login ID and password.
4. In the EngineerOffice 2014 section, enter the name, login ID and password of the SQL server to be used for the EngineerOffice 2014 database.



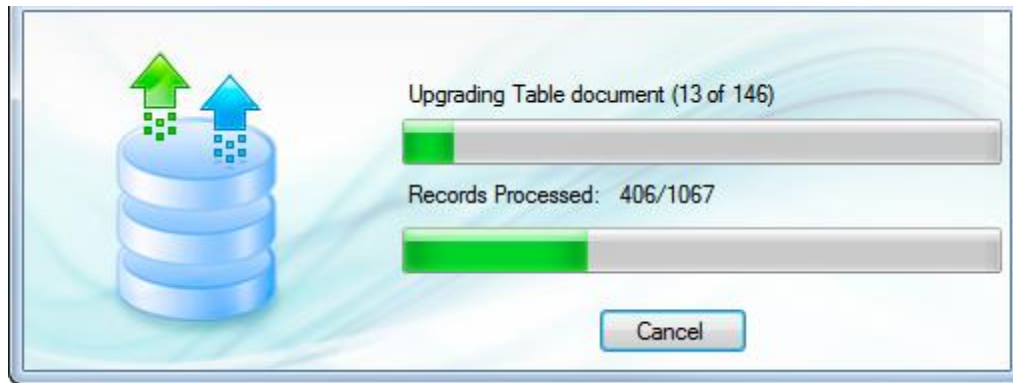
If you forgot the SQL server name, click the *Refresh* icon  next to the SQL Server Name field. It will populate the drop-down field with a list of detected SQL servers.


5. Enter the name for the new database.




Write the name down; you'll need it to open the company database in EngineerOffice 2014.

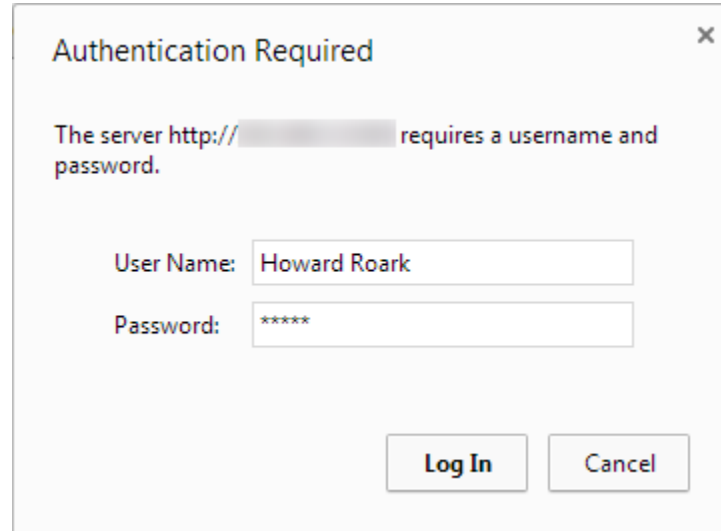
6. If your EngineerOffice-managed documents are stored on a Mac server, select the *Documents are on Mac OS* check box.
7. Click Start. You can see the progress of the data conversion.



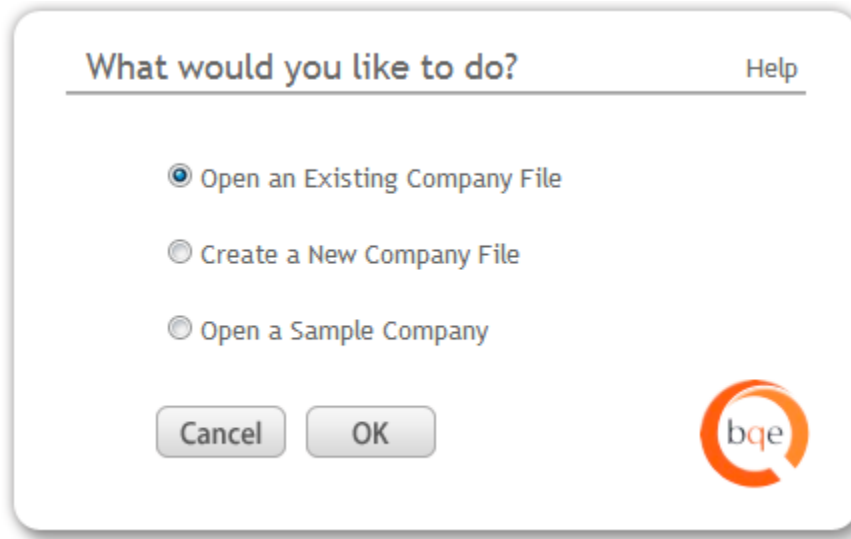
 EngineerOffice creates a log file containing details of the conversion process. When the conversion is completed, you'll be shown the path to the log file for viewing.

 If you need further guidance in setting up EngineerOffice 2014, [please visit our website's 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.

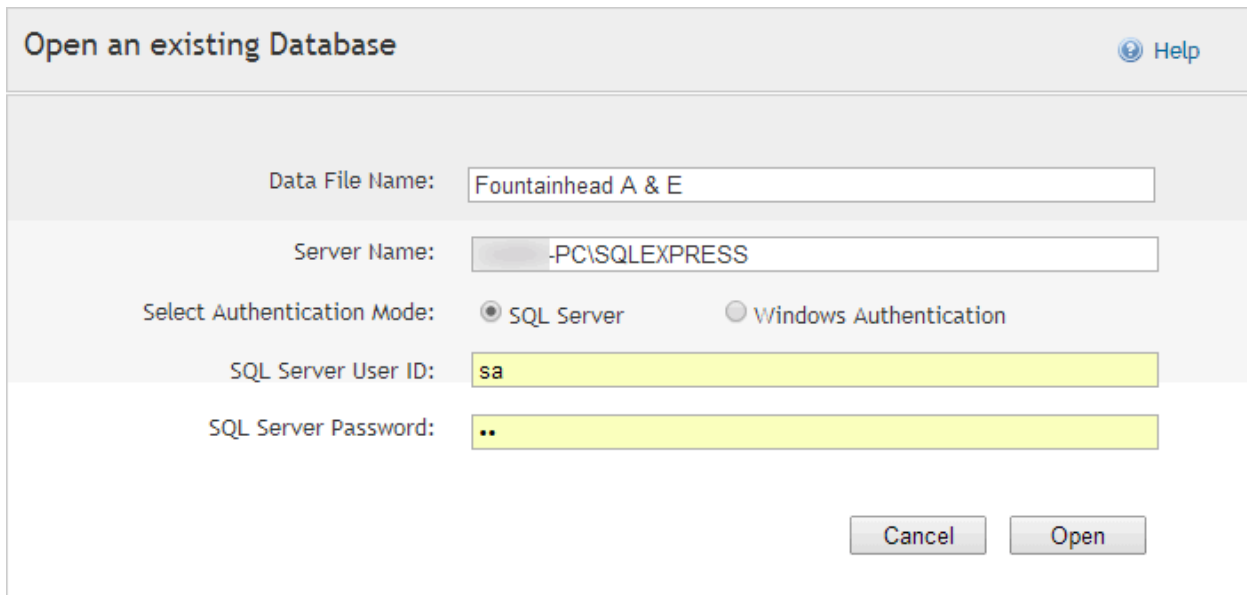
8. After the data conversion is completed, start EngineerOffice 2014 and click Admin Options on the login page. You might be prompted with a Windows Administrative login; if so, enter it.



9. Next, you will be prompted with the 'What would you like to do?' dialog box.
10. Select Open an Existing Company File. *Make sure your web server is able to connect to your SQL Express or SQL Server database program.*




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




We recommend using the SQL Server option. If you must use the Windows Authentication option, have your IT/System Administrator handle it for you.


12. Next, you have to provide the path in the Preferences screen where your project templates and documents are stored.

Preferences: Documents: Path Help

Location of templates: 

Project/ Contact document location: 

☐ Update existing Project and Contact document location.

Legacy Invoices location: 

e.g. \\server\sharedfolder or C:\ArchiOfficeData\2014

By default, the EngineerOffice installer sets the path as: X:\EngineerOfficeData\2014\ where X: is the physical drive on which IIS is installed. However, you must enter the specific path or location of these shared folders in the UNC format (\\ServerIPAddress\sharedfolder\ or \\192.168.4.5\EO2014_Docs).



See the KB article on [How Do I Set the UNC Path for EngineerOffice Documents](#). If your documents are on a Mac file server, check the [Knowledge Base article](#) on how to handle that.

You can also specify the path of your old invoice folder in the Legacy Invoices field. This is used to view a converted invoice in the original PDF layout instead of rendering it in the Crystal Reports window. Click Save.

Next, you will be prompted to [log in](#).

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

EngineerOffice V8 Users

EngineerOffice V8 users cannot upgrade directly to the 2014 version. For a pain-free transition to EngineerOffice 2014, we highly recommend using our Data Conversion Services. Our Conversion Team will migrate or convert your v8 data files and return them to you in the EngineerOffice 2014 format.



To get more information on [BQE Conversion Services](#) for upgrading from EngineerOffice v8 to EngineerOffice 2014, please contact us at (800) 371-0130 (ext#0) or support@EngineerOffice.com.