

Whitepaper



Upgrade Data to EngineerOffice 2015

Power Your Office. Empower Yourself.



Upgrading Data to EngineerOffice 2015

The following information walks you through the steps of converting your EngineerOffice data from previous versions to EngineerOffice 2015 and provides recommendations for post-conversion procedures to ensure data integrity.



The following information is for users who have already installed EngineerOffice 2015. If you haven't installed the software, see the [EngineerOffice Getting Started Guide 2015](#). Mac users should start with the [Set up Mac for EngineerOffice](#) whitepaper.

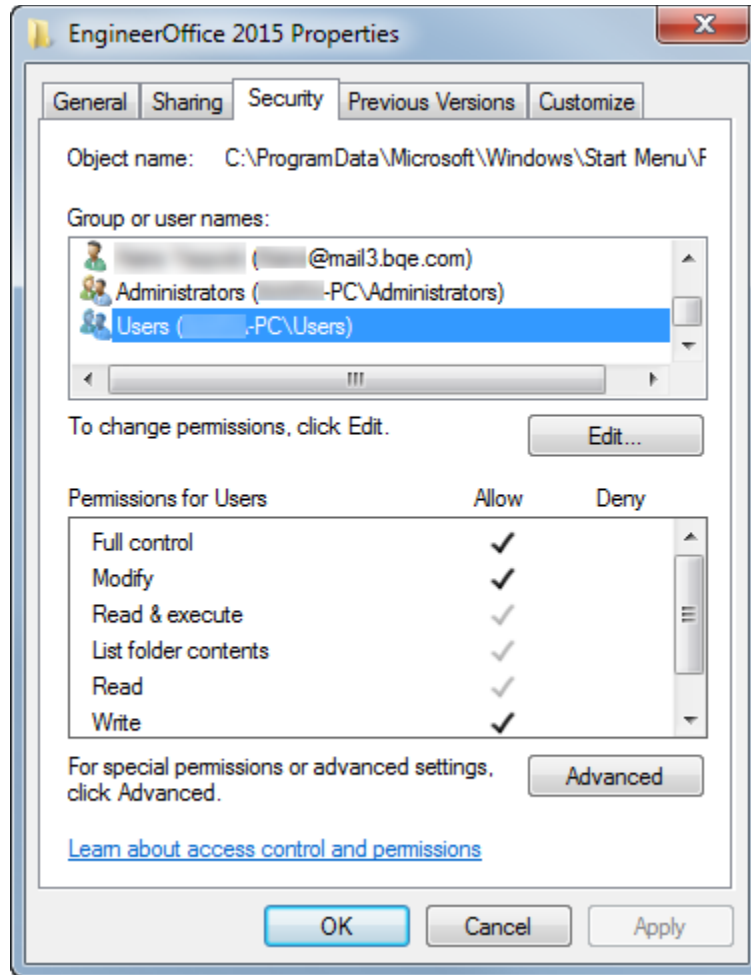
Points to Remember Before Upgrading to 2015

- 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 2015 version can reside and run on the same server as your 2010-2014 installation. We recommend the EngineerOffice 2015 upgrade be installed on the same server as the 2010-2014 installation.
- The EngineerOffice 2015 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.



Your EngineerOffice data is stored in an SQL database using either Microsoft SQL Server or SQL Express. We highly recommend you to back up your database regularly and store multiple backup files on appropriate storage devices. You can back up the database using either Microsoft SQL Server Management Studio or a third-party program.

- 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 2015 version.
- Do not stop your current EngineerOffice server. The 2015 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 2015\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 2015 format by our report writers. Please contact [BQE Technical Support](#) for assistance.
- Release security permissions to **X:\Program Files (x86)\BQE Software\EngineerOffice 2015** for the *Users* group giving it Full Control–Allow. In addition, add Domain Users, if applicable.



Upgrading Data to EngineerOffice 2015

You need the following information to convert your old EngineerOffice data to 2015:

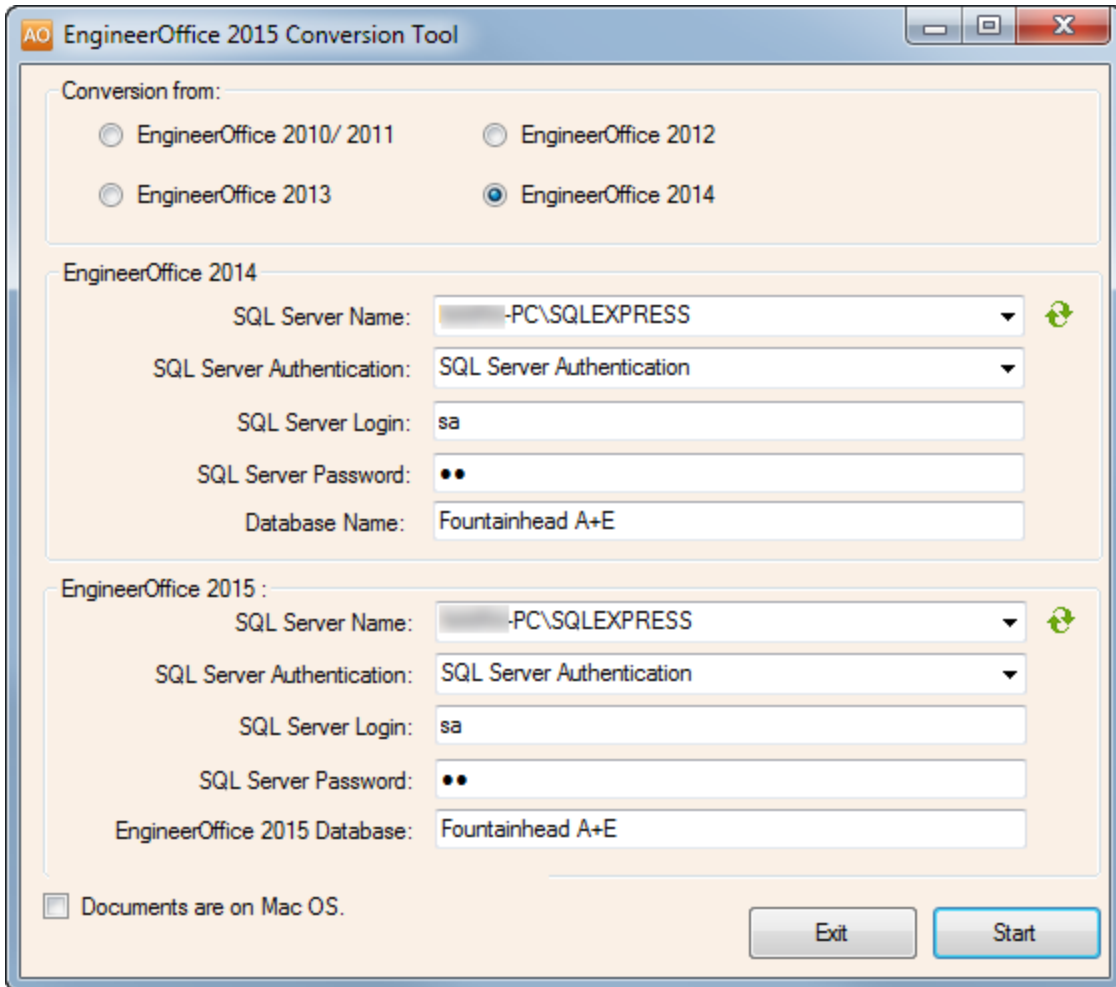
- SQL Server Name
- SQL Server login credentials (The login ID is always **sa** and that user's associated password)
- EngineerOffice Database Name

Do the following to convert your data from EngineerOffice versions 2010-2014 to 2015:



1. After you have completed the EngineerOffice installation, run the conversion tool. On the EngineerOffice server, select Start menu > All Programs > EngineerOffice 2015 > EngineerOffice 2015 Converter. The EngineerOffice 2015 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. 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 2012-2014 user, enter the name of the SQL server where your data is located, its login ID and password.
4. In the EngineerOffice 2015 section, enter the name, login ID and password of the SQL server to be used for the EngineerOffice 2015 database.

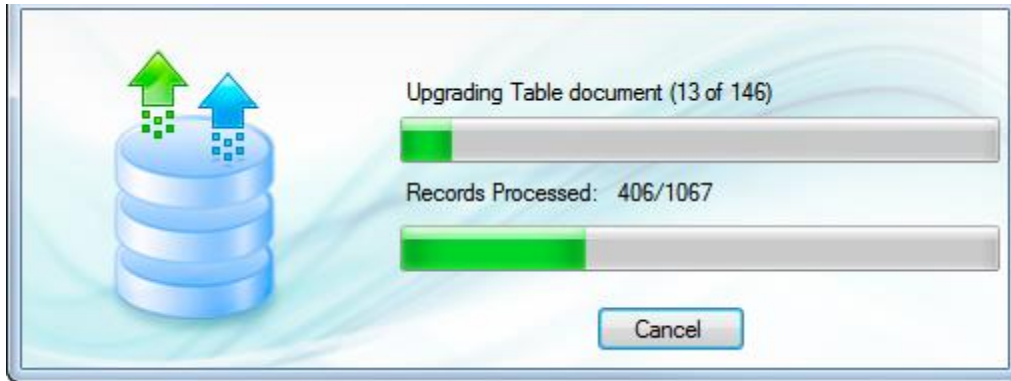
 If you forgot the SQL server name, click the *Refresh* icon  next to the SQL Server Name field. It will populate the drop-down field with a list of detected SQL servers.


5. Enter the name for the new database.


 Write the name down; you'll need it to open the company database in EngineerOffice 2015.

6. If your EngineerOffice-managed documents are stored on a Mac server, select the *Documents are on Mac OS* check box.

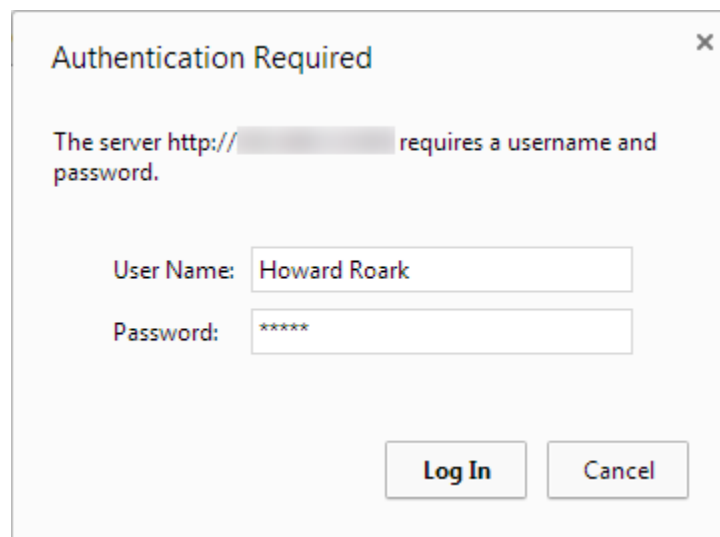
7. Click Start. You can see the progress of the data conversion.



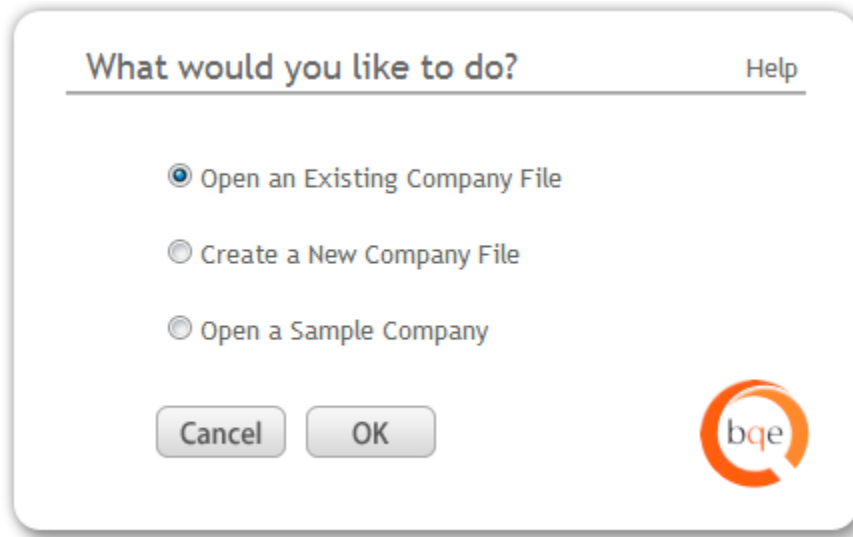
 EngineerOffice creates a log file containing details of the conversion process. When the conversion is completed, you'll be shown the path to the log file for viewing.

 If you need further guidance in setting up EngineerOffice 2015, [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.

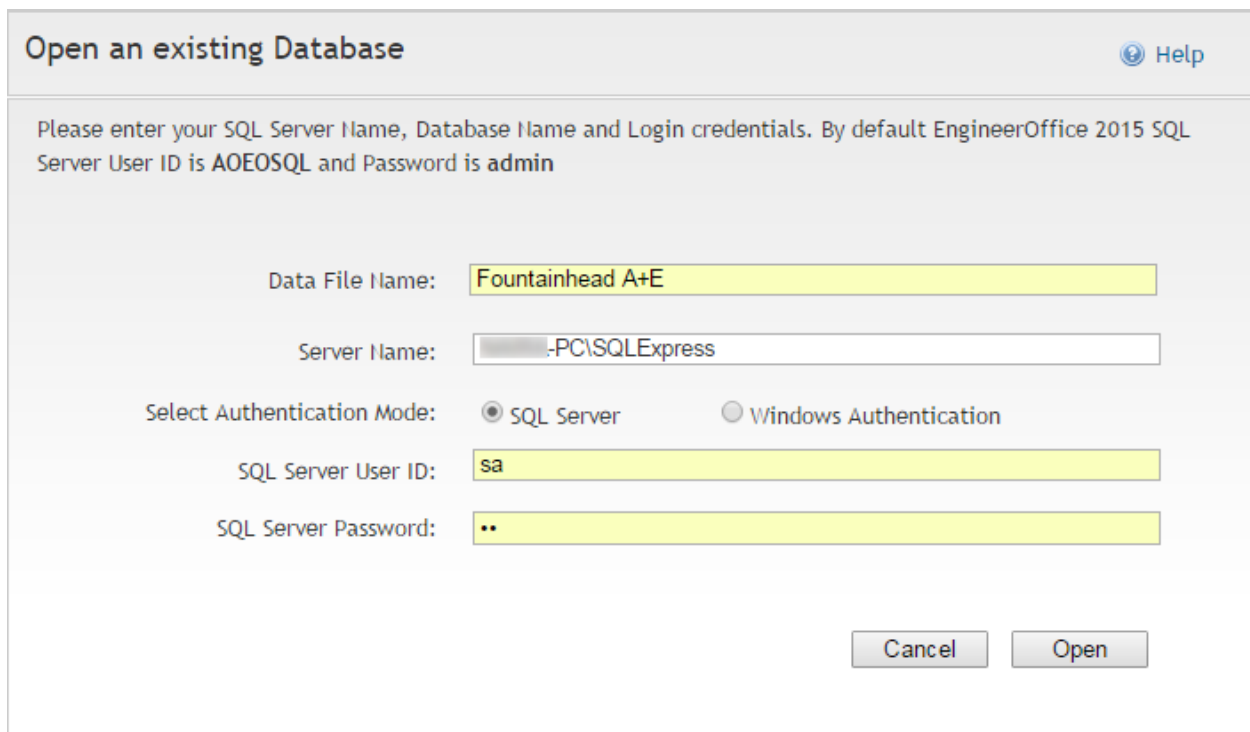
8. After the data conversion is completed, start EngineerOffice 2015 and click Admin Options on the login page. You might be prompted with a Windows Administrative login; if so, enter it.




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:\EngineerOfficeData\2015

By default, the EngineerOffice installer sets the path as: X:\EngineerOfficeData\2015\ 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 (\\Server\IPAddress\sharedfolder\ or \\192.168.4.5\EO2015_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 20xx Stop EngineerOffice Application Server.

EngineerOffice V8 Users

EngineerOffice V8 users cannot upgrade directly to the 2015 version. For a pain-free transition to EngineerOffice 2015, 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 2015 format.



To get more information on [BQE Conversion Services](#) for upgrading from EngineerOffice v8 to EngineerOffice 2015, please contact us at (310) 602-4030 or support@EngineerOffice.com.



BQE Software, Inc.

World Headquarters

NORTH & SOUTH AMERICA

3825 Del Amo Blvd.

Torrance, CA 90503

USA

Tel: (866) 945-1595 (toll-free) | +1 (310) 602-4010

Email: sales@bqe.com | support@bqe.com

AUSTRALIA, NEW ZEALAND & ASIA

Suite 7 255 Broadway

Glebe, New South Wales 2037

Australia

Tel: 1300 245 566 (toll-free) | +61 (02) 9249 7327

Email: aus-sales@bqe.com

EUROPE, MIDDLE EAST & AFRICA

Crosshaven Co. Cork

Ireland

Tel: +44 2034119852

Email: uk-sales@bqe.com

For more information, visit: www.bqe.com