

Overview

Use the TRAVERSE Data Migration Utility to convert and append OSAS 6.1x, 6.5x or 7.0x data to TRAVERSE data. Follow these steps to import OSAS 6.1x, 6.5x or 7.0x data into TRAVERSE:

1. Make sure there is enough free disk space. To import a single company from OSAS, you need approximately as much free disk-space as the original OSAS company files occupy for the data. You will also approximately need 16 MB more for the programs TRAVERSE loads into the SQL database for each company. You will need approximately 3 to 5 times more space for the intermediate steps. For example, a single-company OSAS installation of 94 MB requires 94 MB for the temporary SQL database, 94 MB for log files, 94 MB for DTS packages, if you are saving them, and 110 MB for TRAVERSE tables and SQL programs.
2. Set up a System Data Source Name(DSN) using your operating system's ODBC Data Source Administrator.
3. Convert OSAS data to the temporary SQL database.
4. Install TRAVERSE 10.2 and set up a company to import data into. Start the import process in a company without data in the application you are importing whenever possible.
5. Run the TRAVERSE Data Migration Utility into TRAVERSE 10.2.
6. The TRAVERSE Data Migration Utility converts the OSAS 6.1x, 6.5x or 7.0x temporary SQL database to TRAVERSE 10.2.
7. Run the TRAVERSE Data Migration Utility from TRAVERSE 10.2 into TRAVERSE 10.5.

Typical Import

The typical import method is recommended for most users.

The Data Migration Utility uses predefined field and file definitions to convert the OSAS 6.1x, 6.5x or 7.0x temporary SQL database to TRAVERSE tables and fields.

Converting OSAS Data to Temp SQL

You must convert OSAS 6.1x, 6.5x or 7.0x data to a temporary SQL database before the Data Migration Utility can convert the data to temporary tables.

Complete these tasks in OSAS 6.1x, 6.5x or 7.0x before you convert your OSAS 6.1x, 6.5x or 7.0x data files:

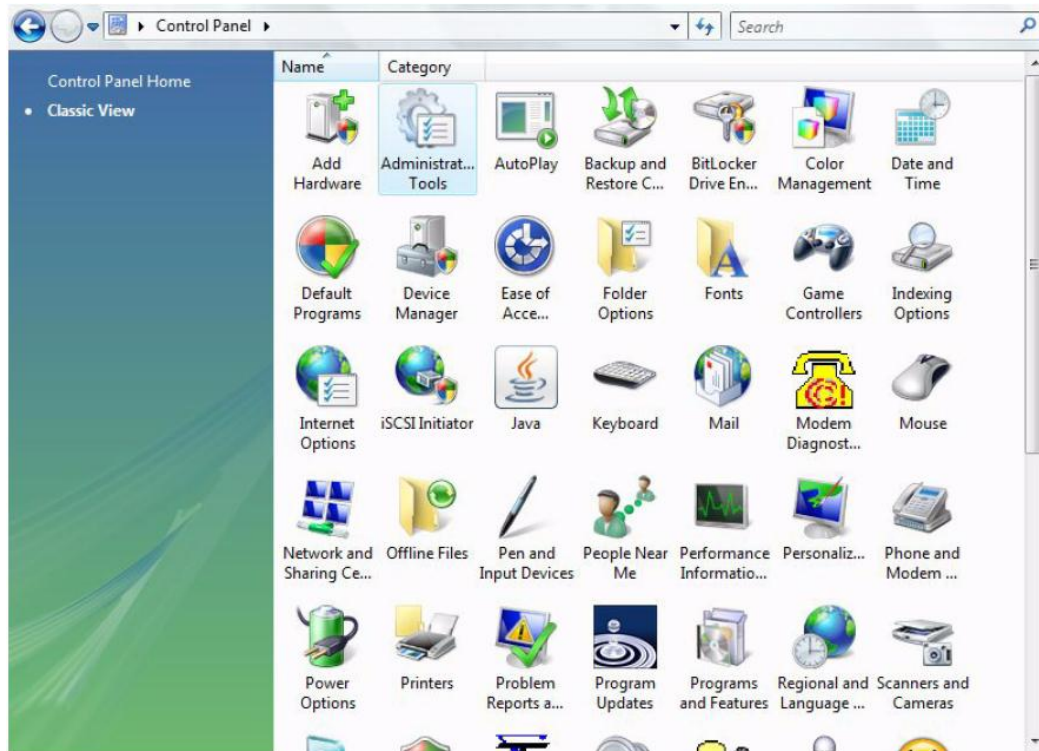
- Write the GL transaction work files to journal files.
- Post transactions in the applications you convert.
- If you have Inventory, use the OSAS Quantity Cross Verification function in Periodic Processing before exporting OSAS to the temporary SQL database.

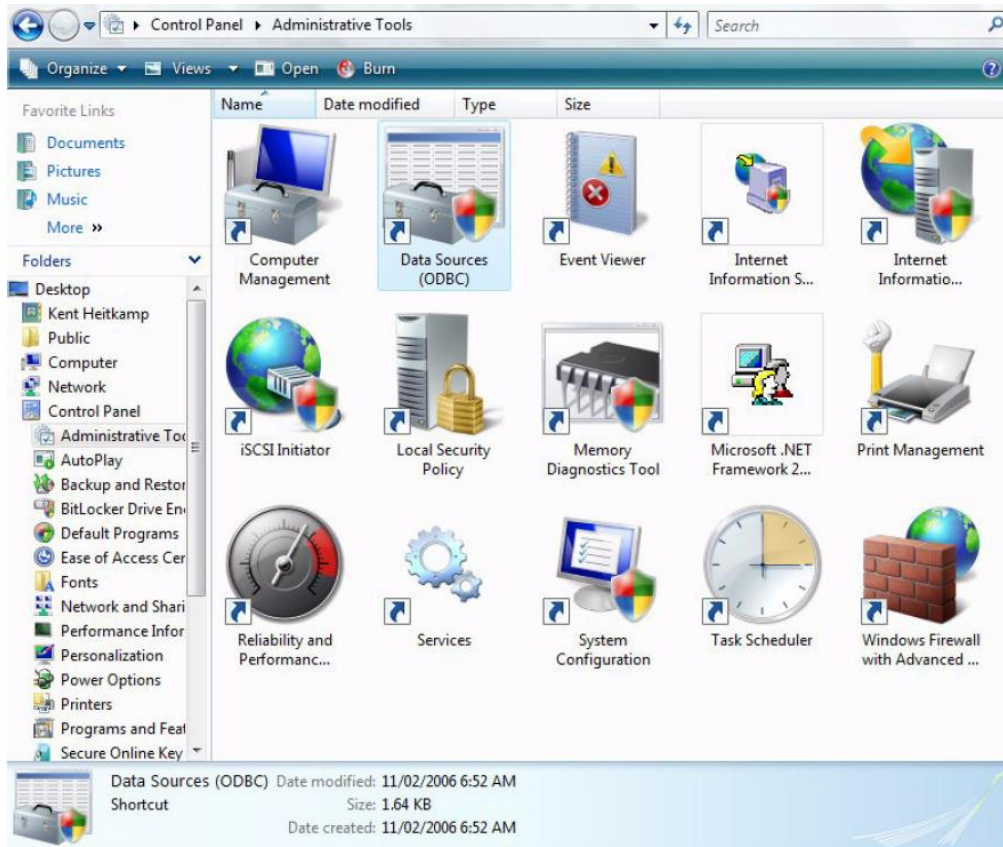
- Assign valid account types to each GL account.
- Print or have available OSAS master file lists for determining default conversion values.

To convert your OSAS 6.1x, 6.5x or 7.0x data files for use with TRAVERSE, follow these steps:

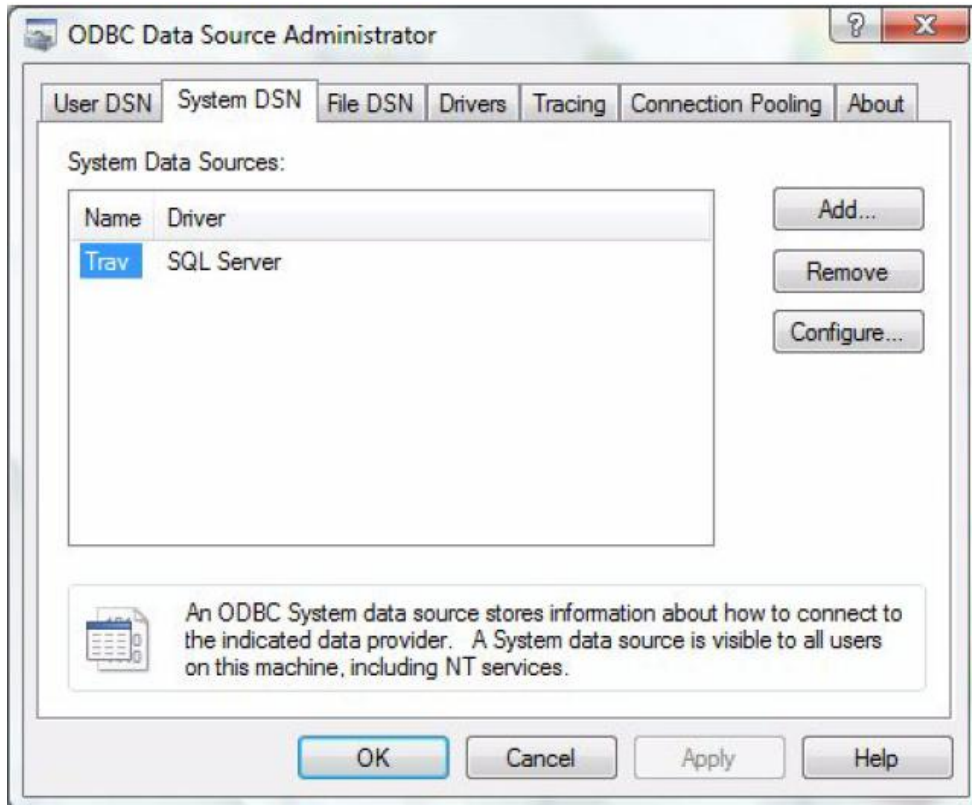
Setting up the DSN

1. Open your Data Sources function from Start, Settings, Control Panel, Administrative Tools menu.

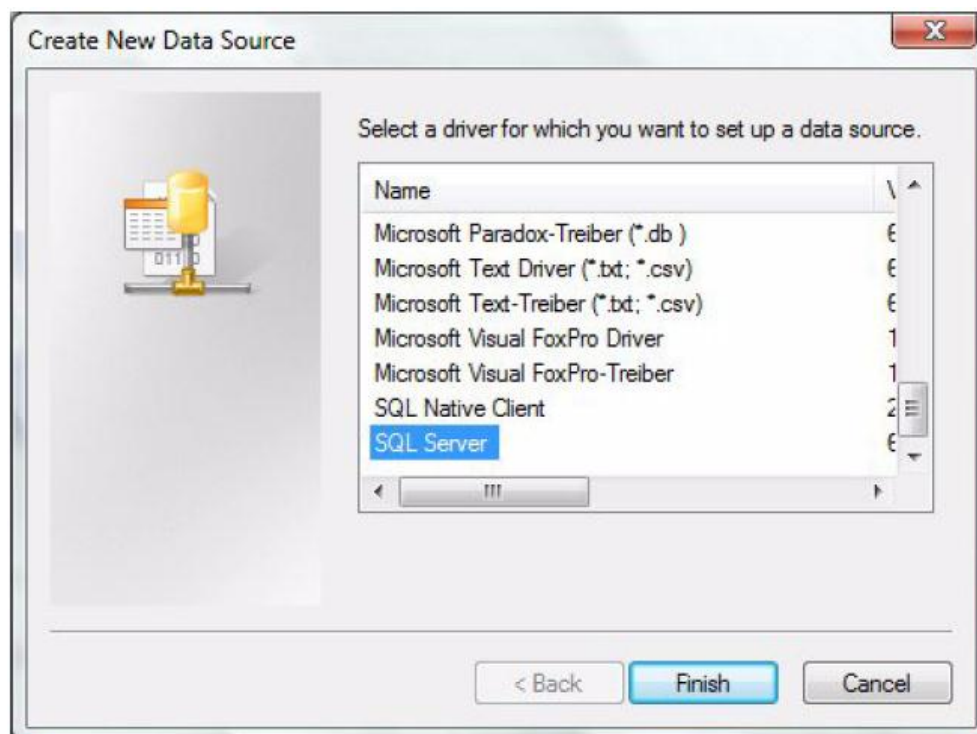




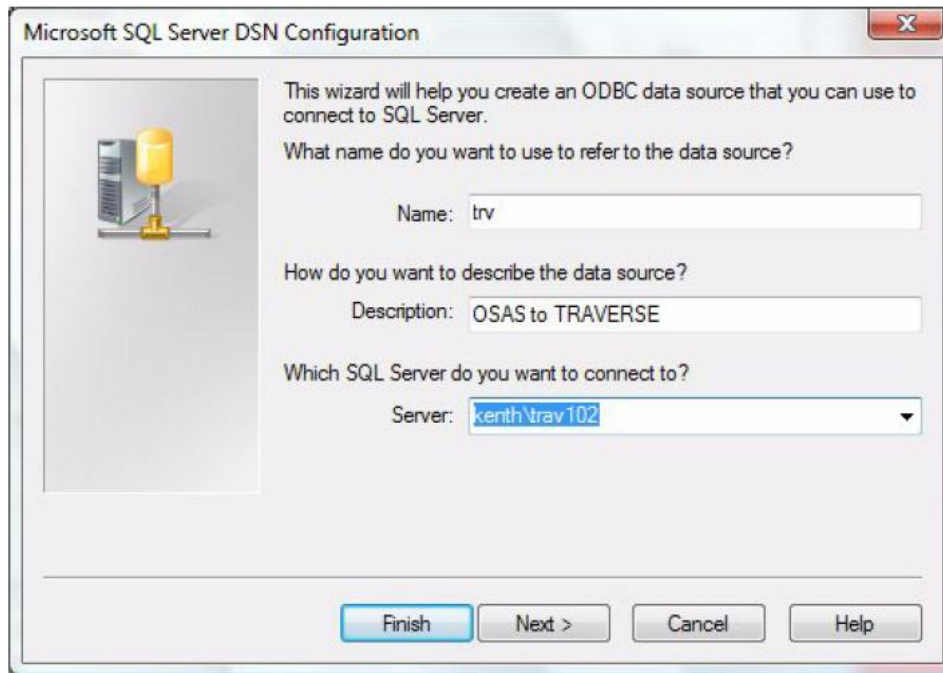
2. When you double click on Data Sources(ODBC) your ODBC Data Sources Administrator screen appears. Click on the System DNS tab.



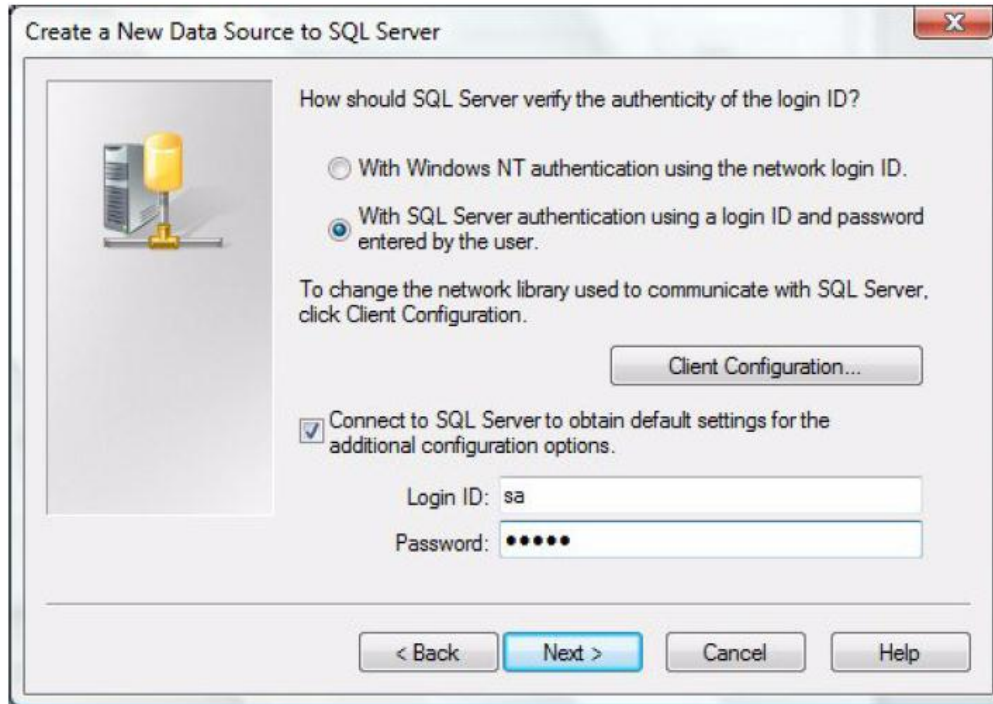
3. Click on the Add button and the Create New Data Source screen appears.



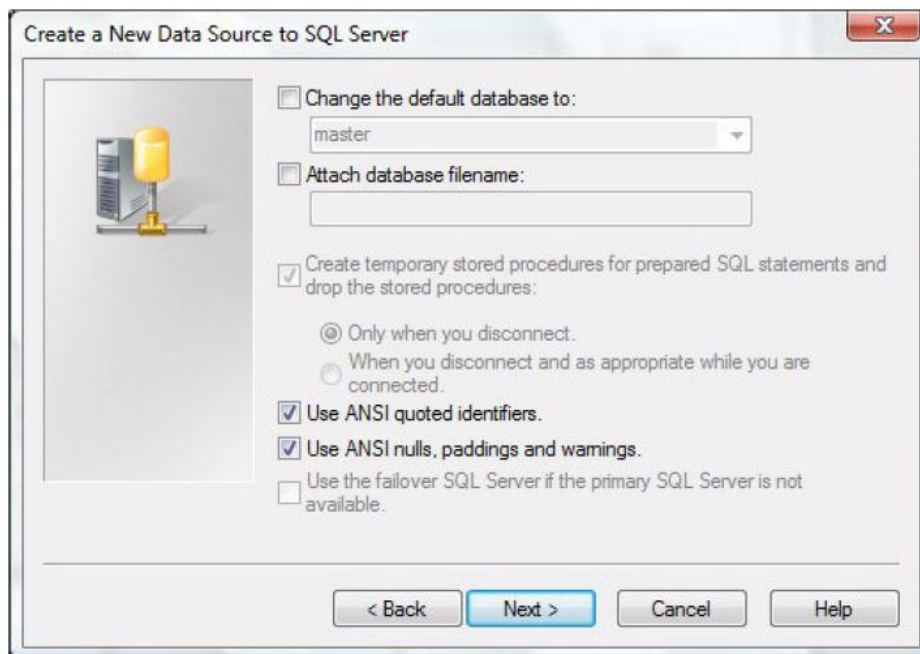
4. Select SQL Server as the Source and click on Finish. The Create a New Data Source to SQL Server screen appears.



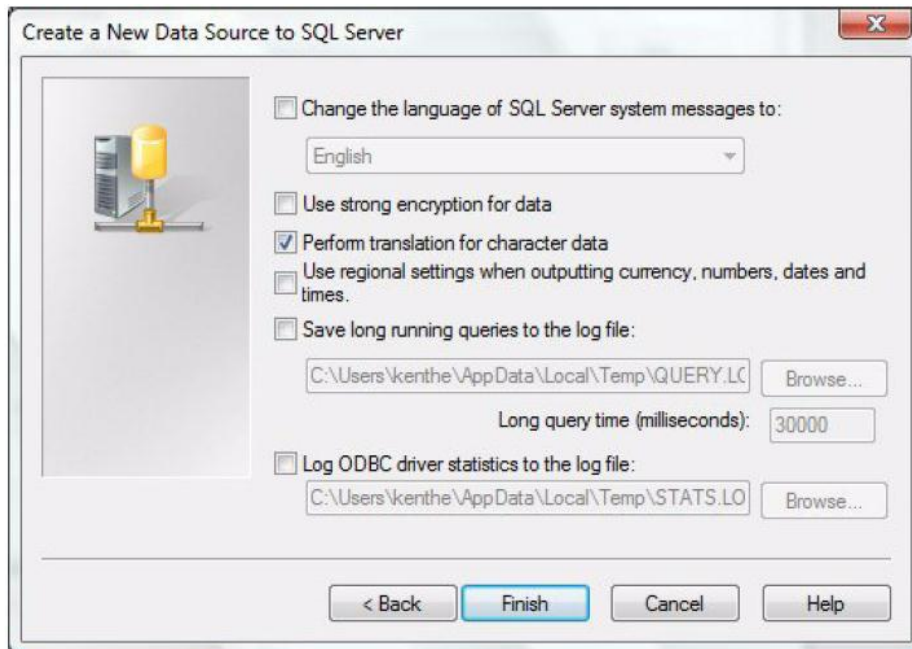
5. Type in a name for your Data Source. An example would be TRAV, so you can identify this with TRAVERSE.
6. Type in a description for the data source.
7. Enter the server name you are going to be connecting to for the data migration into TRAVERSE 10.2. Click on Next and the next screen appears.



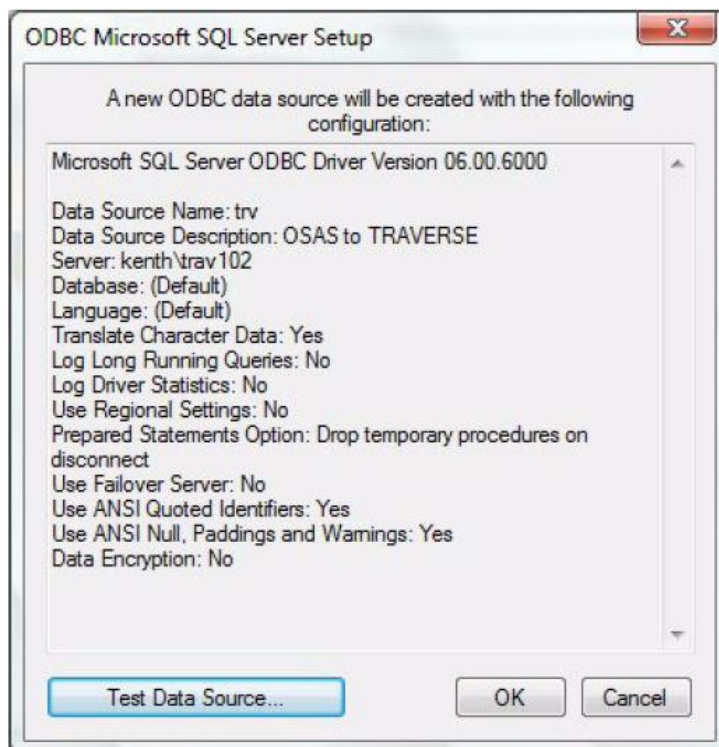
8. Select the “With SQL Server authentication using a login ID and password entered by the user.” radio button.
9. Leave the “Connect to SQL Server to obtain default settings for the additional configuration options.” check box blank and click on Next.
10. The next screen appears.



11. Select the following options, “Create temporary stored procedures for prepared SQL statements and drop the stored procedures:”, “Only when you disconnect.”, “Use ANSE quoted identifiers.” and “Use ANSI nulls, paddings and warnings.”. Click Next and the next screen appears.



12. Select “Perform translation for character data” and click on Finish. The finish screen appears.



13. Click OK and you now have your ODBC data source set up for your OSAS to TRAVERSE conversion.

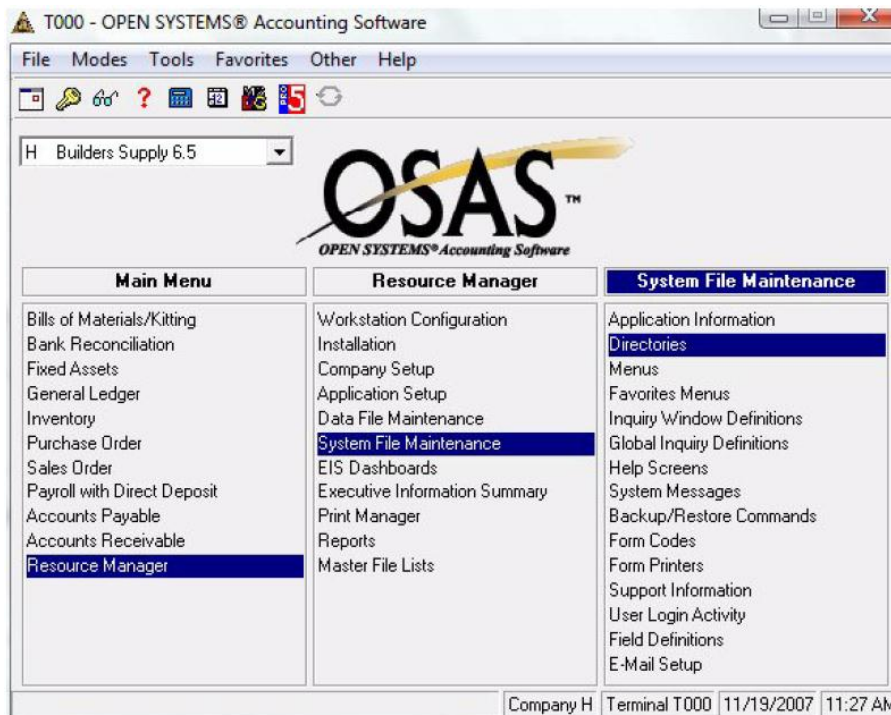
Installing OSAS to TRAVERSE conversion

- Put the TRAVERSE version 10.5 CD-ROM into your CD drive. Open Windows Explorer or My Computer and open the CD ROM drive. Open the OSAS folder. Highlight the ProgZZ.zip file corresponding to your OSAS version a temporary or install folder on the hard drive of the computer you are currently working on.

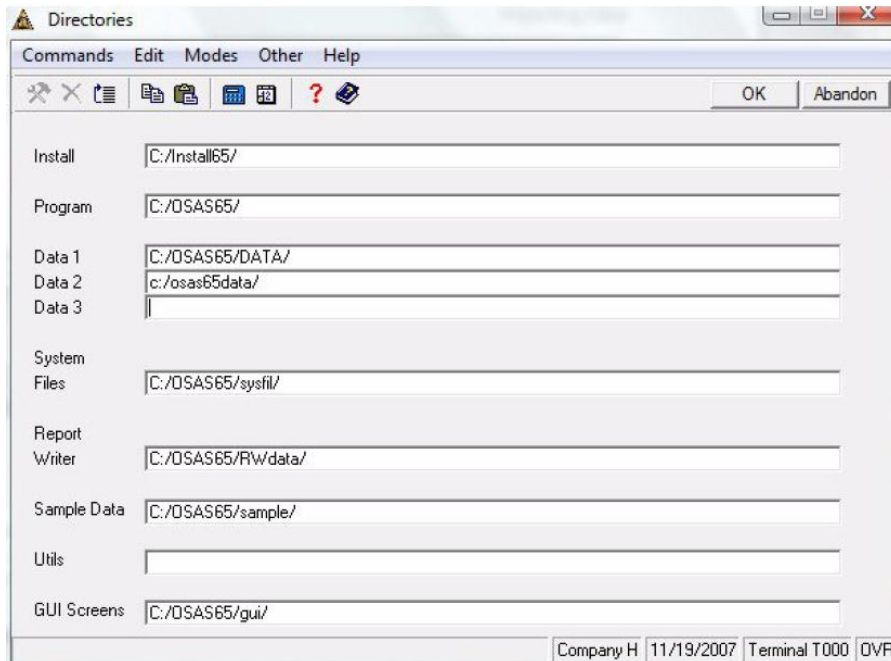
For example: the path could read C:\Install. Extract the file into this folder. Once extracted, make sure the files are not read only by right clicking on the files and select Properties. Take off the read only property for each file. (Make sure you open the Progzz folder and take the read only off the ZzProgzz.zip file.) (Do Not unzip the ZzProgzz.zip file.)

To convert 7.5x data, you must first follow the instructions to extract the ProgZZ for 7.x and complete the install. Download the OS75CNVTtoTRAVERSE.zip file. Extract the contents of the zip file into the ProgZZ. There are 12 .trv files contained include in the zip. Once the .trv files have been replaced you can continue with the OSAS to temp SQL processing.

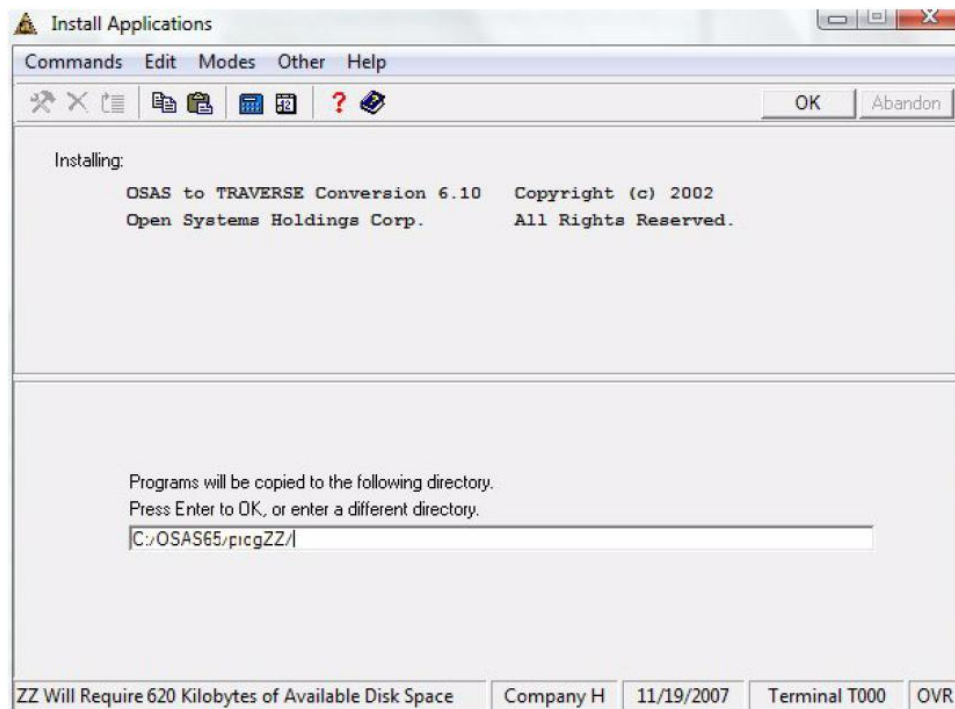
- Start OSAS 6.1x, 6.5x or 7.0x.



- Verify the default directory stored in the **Install** path in **Resource Manager - System File Maintenance - Directories**, to make sure the Install path matches the path you copied the install programs into. If you are installing the OSAS to Traverse Conversion utility from a local hard drive the install path should read C:\Install\.



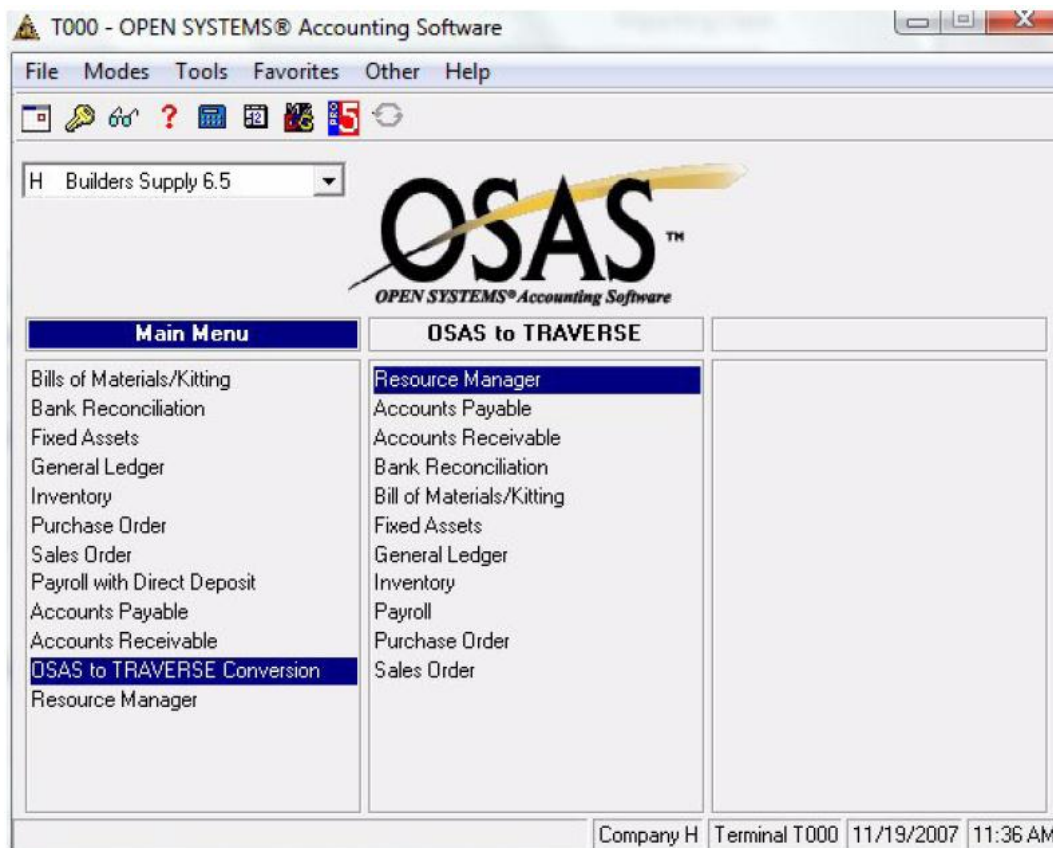
4. Select **Install** from the Resource Manager Installation menu. The Installation screen is displayed.



5. Use the default installation directory that is displayed and press **PAGEDOWN** to proceed with the installation. After the installation is completed and the installed files are unzipped, the selection **OSAS to TRAVERSE Conversion** appears on the Main menu.

Converting OSAS temp SQL

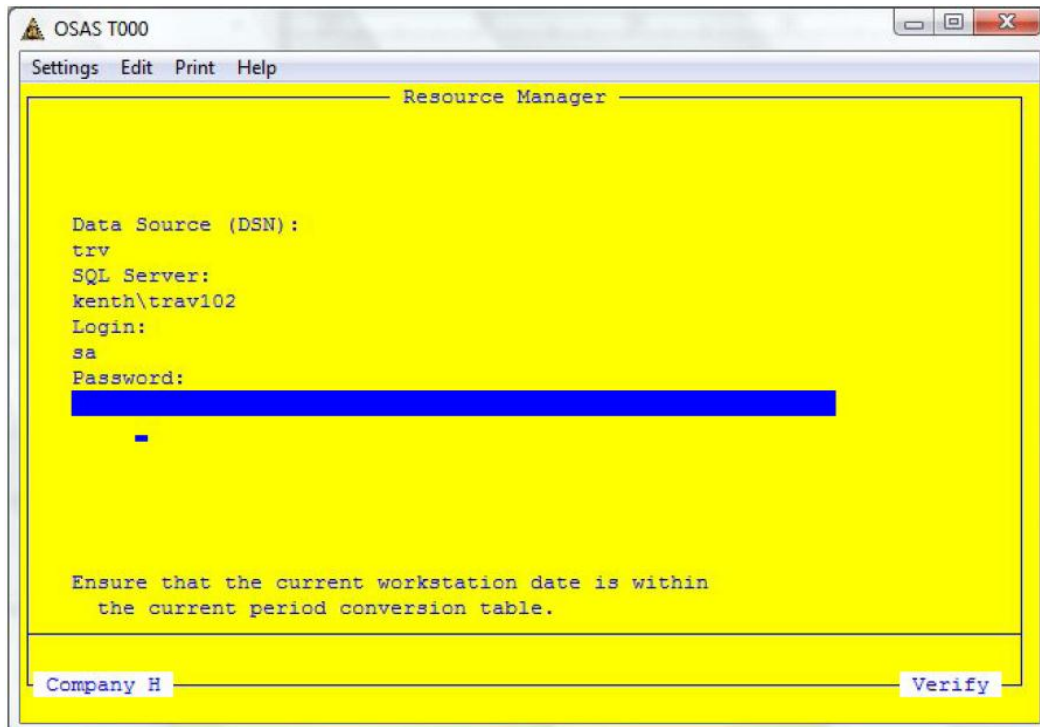
1. Select OSAS to TRAVERSE Conversion. The OSAS to TRAVERSE Conversion menu is displayed.



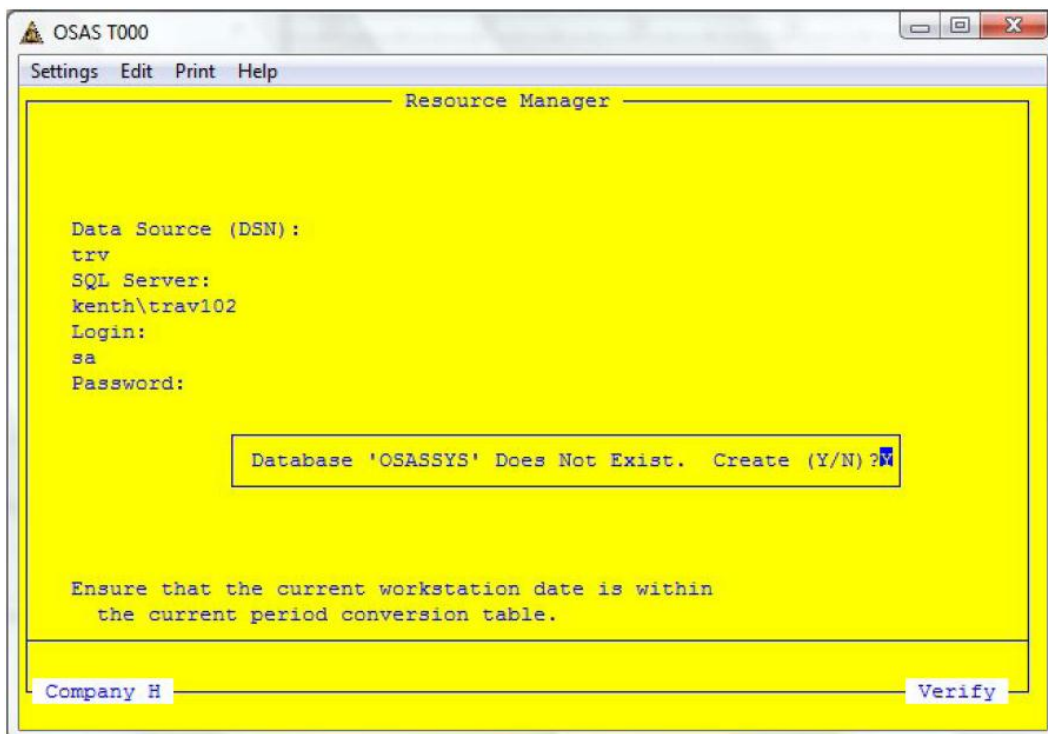
2. Select the application you want to convert (Accounts Payable, Accounts Receivable, Bank Reconciliation, Inventory, General Ledger, Purchase Order, or Sales Order).

Note: Resource Manager must be converted first. After RM has been converted the other applications can be converted in any order. When the conversion starts you will be prompted to create a sql.ini file and to update the config.bbx file. Click OK and the sql.ini file will be created and the config.bbx file will be updated to read the sql.ini file. This must be done to be able to create the temporary SQL database for your OSAS data.

3. Enter the name of the **Data Source (DSN)** you set up in the previous section. Use the same Data Source (DSN) for all applications of a company. If you are converting multiple companies, convert each application for one company, and then change companies and convert each application for that company. The OSAS to TRAVERSE conversion program will make a separate database for each company.
4. Enter the SQL Server name that you installed TRAVERSE version 10.1 on. Enter the login for a system administrator for the SQL Server, by default that is the login of sa. (You don't have to log in as the user sa, but the user that logs in must be an administrator level user with a SQL standard login.) Enter the password for the login user you entered. Press page down and click on OK. The files for the application are converted into the SQL database for that company.

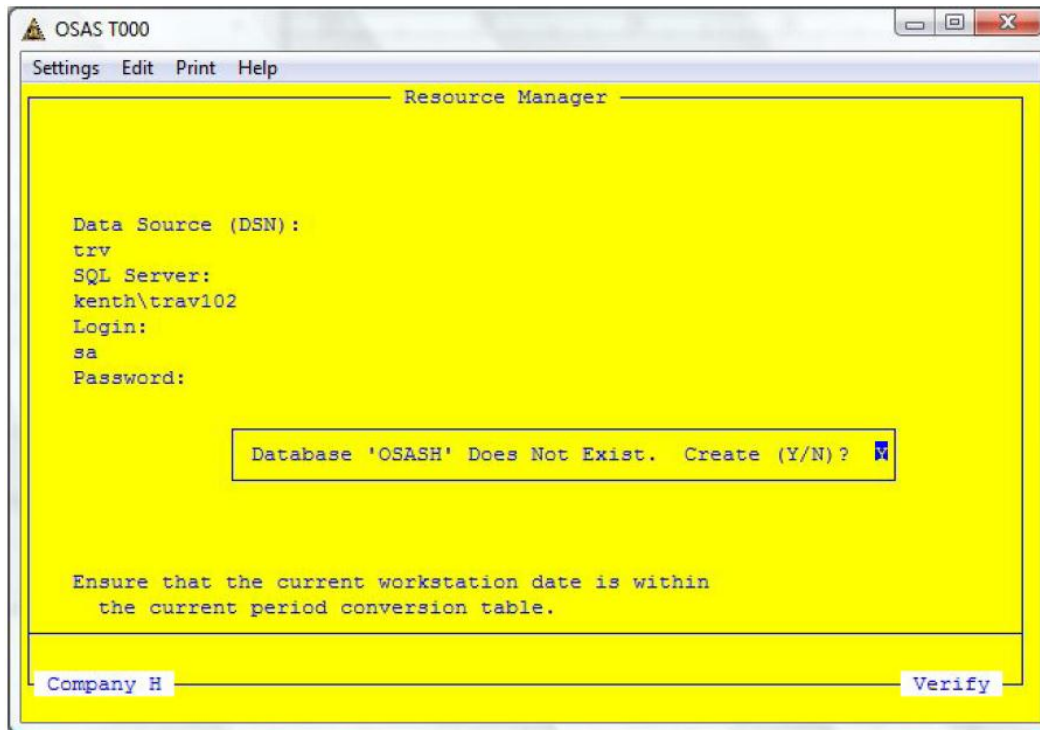


5. The first application you convert will create a database called OSASSYS. You will be prompted that the file does not exist, do you want to create it. Type Y and press Page Down and the database will be created.



6. The first application you convert will create a database called OSASX. Where X is your OSAS company ID. You will be prompted that the file does not exist, do you want to create it. Type Y and press Page Down and the database

will be created.



7. Press F7 to exit and select the next application, on the menu, to convert. Repeat steps 2 through 6 above for each application. When converting General Ledger a list of years will be displayed. This will indicate the years you have last year files for. You can select the years you want to migrate by typing Y or N for each year, this will change the selection to yes or no.



- Once all applications have been converted exit OSAS.

Data Migration

To migrate your existing TRAVERSE data into TRAVERSE version 10.5 databases, use the TRAVERSE Data Migration Wizard. The Wizard uses Data Transformation Services (DTS) technology for this process. DTS technology provides the tools that allow the Wizard to extract, transform, and consolidate data from several sources into single or multiple destinations. The Wizard provides you with the easiest method of copying data from previous versions of TRAVERSE by creating data migration packages.

A DTS package is an organized collection of connections, DTS tasks, DTS transformations, and workflow constraints assembled with the Wizard and saved to Microsoft SQL Server.

Each package contains one or more steps that are executed sequentially or in parallel when the package is run. When executed, the package connects to the correct data sources, copies data and database objects, transforms data, and notifies other users or processes of events. Packages can be edited, password protected, and retrieved by version.

With the Data Migration Wizard, you can currently upgrade TRAVERSE version 10.1 and TRAVERSE version 10.2 to TRAVERSE version 10.5.

Creating Data Migration Packages

To create the data migration packages required to migrate your existing data, follow these steps:

Note: To migrate data from TRAVERSE versions 10.1 or 10.2 you must install a new instance of SQL 2000, MSDE, SQL2005 or SQL2005 Express for your TRAVERSE version 10.5 data you will be migrating into.

Note: To migrate data from TRAVERSE versions 10.1 or 10.2 you must install the 10.1 or 10.2 Server Manager and use this utility to make the SYS and company databases you will be migrating to 10.5. A 10.2 CD and temporary key can be provided to you by contacting the Open Systems sales department.

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Note: To migrate data from OSAS you must migrate the OSAS data from OSAS into a temporary SQL database, migrate that data into TRAVERSE 10.2, then migrate that TRAVERSE 10.2 data into TRAVERSE 10.5.

Open your TRAVERSE version 10.5 Server Manager, logging in as the user sa with the password.

Use the **New Database** function to create a new company database.

To create a new company database, right-click on **TRAVERSE** or any company database and select **New Database**, or click the **New Company** button on the toolbar.

1. On the **General** tab, enter a three character ID of the new company in the **Name** text box. Only numbers and A-Z characters are allowed.
2. Enter a brief description of the company in the **Description** text box.
3. When creating a company database, you should estimate how big it will be when filled with data. If the initial size that appears in the **Initial Size** field is not large enough for what your database requires, change the number.

Once created, the database size automatically grows as you add information. To change how the database grows (whether it be by megabytes or by percentages), use Microsoft SQL Server Enterprise Manager or Management Studio.

Note: The database limit when using MSDE is 2GB per database.

4. The **Template Folder** field displays the default path where the Server Manager template file is installed. Should you need to locate the Template.tsm file, use the browse button to search for it.
5. Go to the **Advanced Options** tab and verify you have the correct **Base Currency**, **Default Company** and **Default Language**.

Note: When you are migrating from any OSAS version or TRAVERSE version 10.1, you need to select DOLLAR as the Base Currency for your companies.

6. Click **OK**. The Status tab appears and displays Server Manager's progress as it creates the new company database.
7. When finished, **Completed** displays on the **Status** tab and the following message box appears: "New Company Database created. Refer to log for any messages." Click **OK**.

If you will be migrating payroll data also you will need to create your payroll databases for each year you will be migrating.

Each year of payroll information is stored in a separate database. To add a new payroll-year database to a company database, follow these steps:

8. In the left column of the main window, right-click on the company to which you want to add a payroll-year database and select **New Payroll Year** from the right-click menu. The Add Payroll Year dialog box appears.

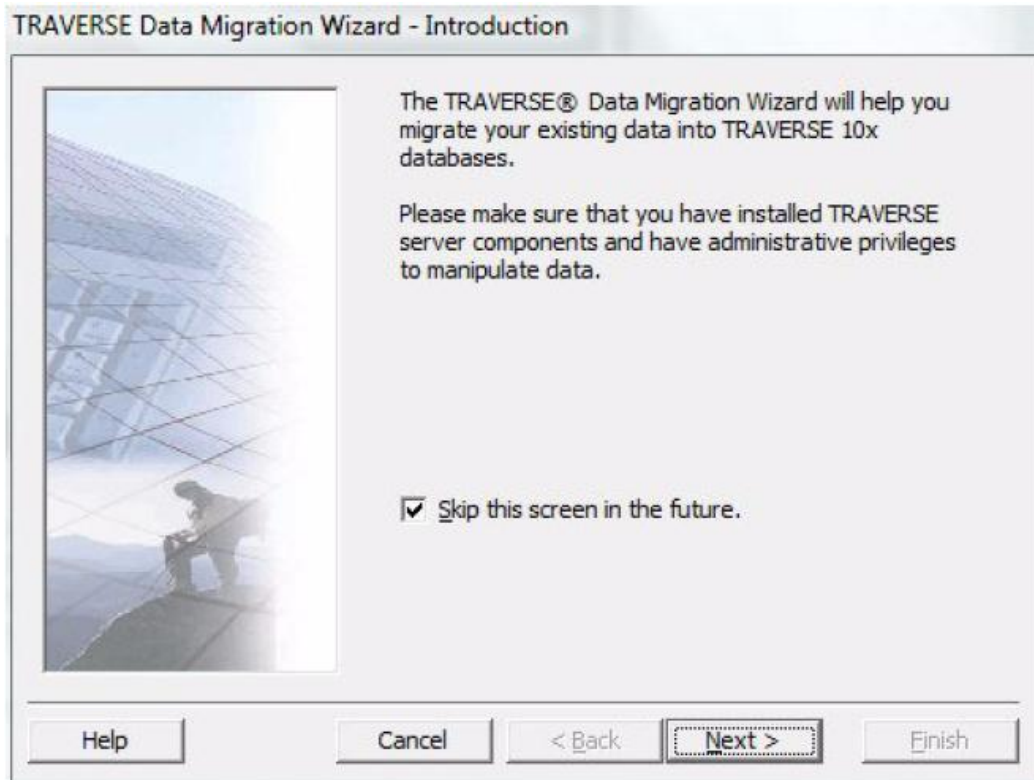
9. Select the company database to which you want to add a payroll year. The database name will be saved in the format **YYYyyyy**, where **YYY** is the company database name and **yyyy** is the payroll year.
10. The **Year** text box displays the sequential payroll year for the company database. If you want to save the payroll year as a different one than the default, change it here.
11. When creating a database, you should estimate how big it will be when filled with data. If the initial size that appears in the Initial Size field is not large enough for what your database requires, change the number.

Once created, the database size automatically grows as you add information. To change how the database grows (whether by megabytes or by percentage), use Microsoft SQL Server Enterprise Manager.

Note: The database limit when using MSDE is 2GB per database.

12. The **Template Folder** field displays the default path where the Server Manager template file is installed. Should you need to locate the Template.tsm file, use the browse button to search for it.
13. Click **OK**. The **Status** tab appears and displays Server Manager's progress as it creates the new payroll year.
14. Select **TRAVERSE Data Migration** from the **External Tools** list box or select it from the **Start** menu.
15. The TRAVERSE Data Migration Wizard–Introduction window appears.

Note: If TRAVERSE Data Migration is not in the External Tools list box, select Locate and browse to the TRAVERSE Data Migration file (TravDUWiz.exe) to add this tool.



16. Select the **Skip this screen in the future** check box if you don't want to view the current window when building data migration packages in the future.

Note: You must create the database to which you want to migrate data using Server Manager prior to beginning the Data Migration process. See steps at the beginning of this section to create company databases.

Note: The data migration steps vary depending on which platform you are using. For OSAS, see steps below, for 10.1 and 10.2 steps, "Version 10.1 and 10.2" on (page 2-21).

OSAS Data Migration

Note: You can click Cancel to exit the Data Migration Wizard or click Back to return to the last window at any time when the options appear on the window.

Note: When migrating from OSAS to TRAVERGE version 10.5 you must first migrate your data to TRAVERGE 10.2, then migrate from TRAVERGE 10.2 to TRAVERGE 10.5.

Note: To migrate data from TRAVERGE versions 10.1 or 10.2 you must install a new instance of SQL 2000, MSDE, SQL2005 or SQL2005 Express for your TRAVERGE version 10.5 data you will be migrating into.

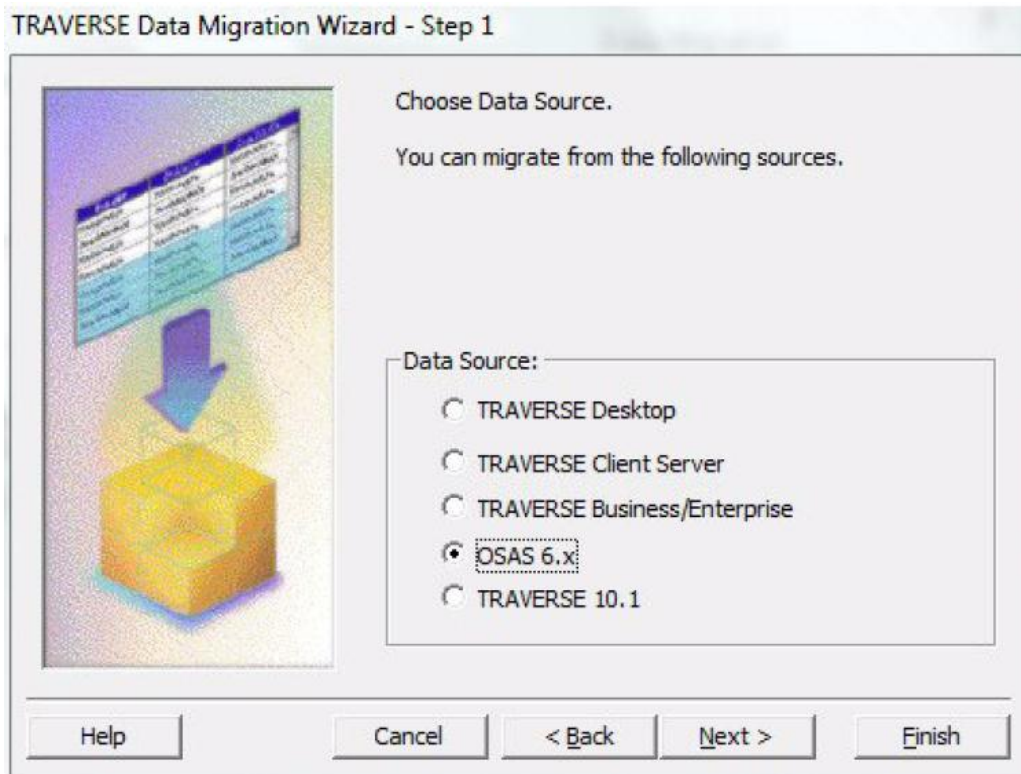
Note: To migrate data from TRAVERGE versions 10.1 or 10.2 you must install the 10.1 or 10.2 Server Manager and use this utility to make the SYS and company databases you will be migrating to 10.5. A 10.2 CD and temporary key can be provided to you by contacting the Open Systems sales department.

Note: Follow the steps below to migrate your OSAS data to TRAVERGE 10.2 then continue with the Version 10.1 and 10.2 Migration 2-21.

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1. Open your 10.2 Server Manager and select **TRAVERSE Data Migration** from the **External Tools** list box or select it from the **Start** menu. The TRAVERSE Data Migration Wizard–Introduction window appears.
2. After viewing the TRAVERSE Data Migration Wizard–Introduction dialog box, click **Next**. The TRAVERSE Data Migration Wizard–Step 1 window appears.



3. From the **Data Source** section of the dialog box, select **OSAS 6.x**.
4. Click **Next** to continue. The TRAVERSE Data Migration Wizard–Step 2 window appears.

TRVERSE Data Migration Wizard - Step 2

Provide the following information about the data source.



Connection:

SQL Server: kenth\trav102

Login: sa

Password: *****

Use Trusted Connection

Sys DB: OSASSYS

Test Connection

Help Cancel < Back Next > Finish

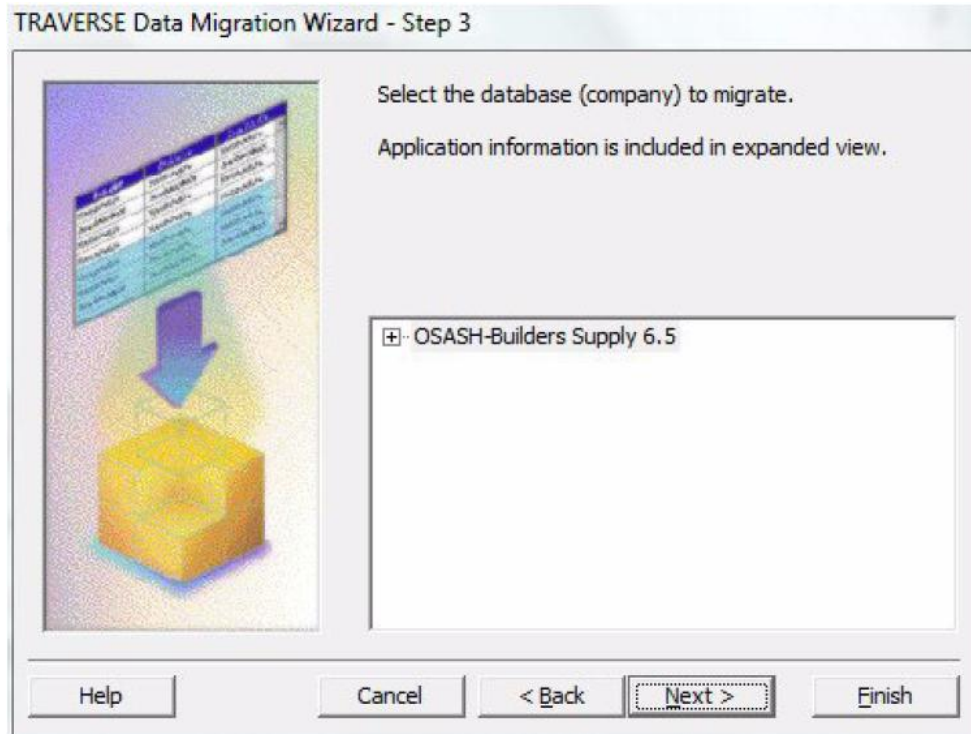
If you are currently logged in using a trusted connection, the **Use Trusted Connection** check box is selected.

5. From the **SQL Server** list box, specify the SQL Server where the data is currently stored.
6. Specify the login information needed to connect to that SQL Server. For more information on logins, see the Login & Security section in the Administrator's Guide.

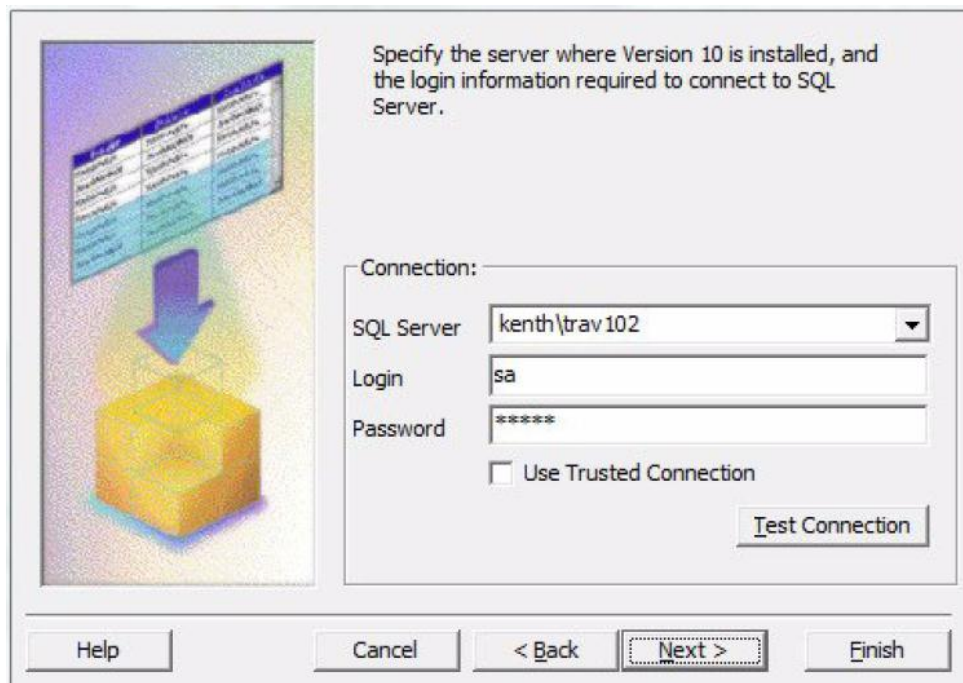
If the login for the SQL Server you specified requires SQL Server Authentication, enter the **Login** and **Password** (optional).

To test your connection to the SQL Server you selected (optional), click **Test Connection**. A message box appears confirming that your connection was successful or that the login failed.

7. Click **Next** to continue. The TRVERSE Data Migration Wizard - Step 3 window appears.



8. Select the database that you want to migrate. The database name will be OSASxxx. The xxx is the OSAS company Id.
9. Click **Next** to continue. The TRVERSE Data Migration Wizard–Step 4 window appears.



If you are currently logged in using a trusted connection, the **Use Trusted Connection** check box is selected.

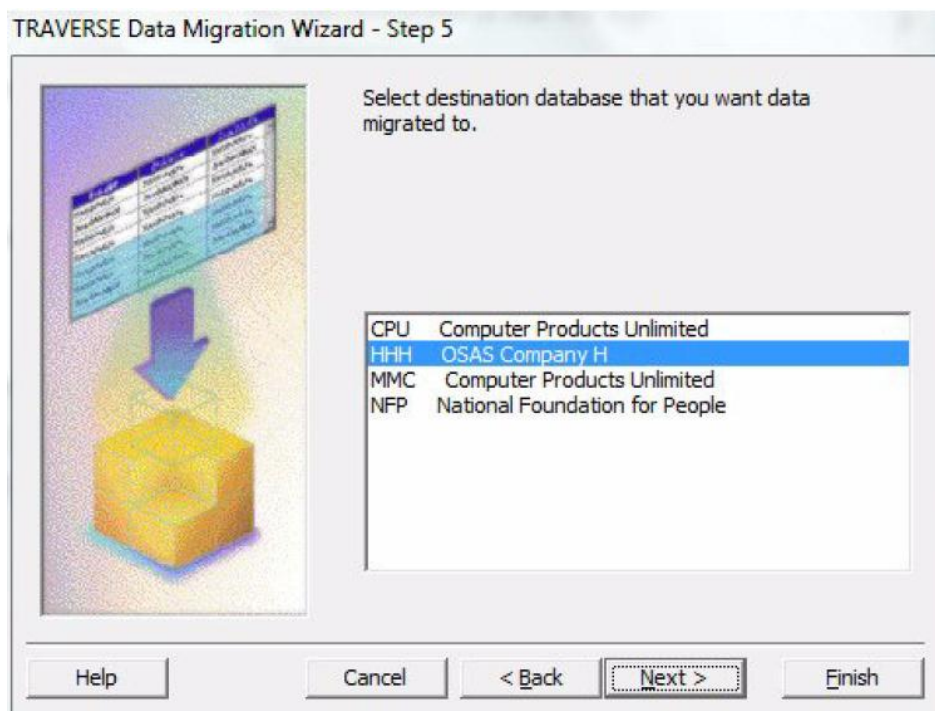
10. From the **SQL Server** list box, specify the SQL Server where TRAVERSE version 10.2 is installed.

11. Specify the login information needed to connect to that SQL Server.

If the login for the SQL Server you specified requires SQL Server Authentication, enter the **Login** and **Password** (optional).

To test your connection to the SQL Server you selected (optional), click **Test Connection**. A message box appears confirming that your connection was successful or that the login failed.

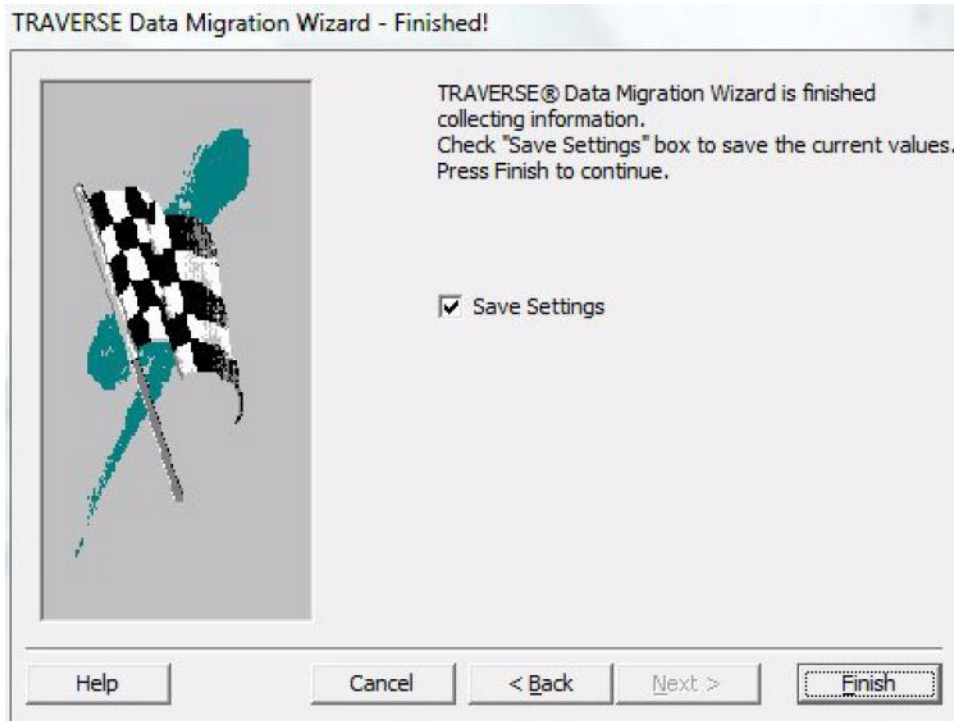
12. Click **Next** to continue. The TRAVERSE Data Migration Wizard–Step 5 window appears.



13. Select the company database where you plan to integrate the data.

Note: If you have a one digit OSAS company Id the Data Migration Utility will automatically associate your one digit company Id with the three digit company Id for TRAVERSE and convert the necessary fields.

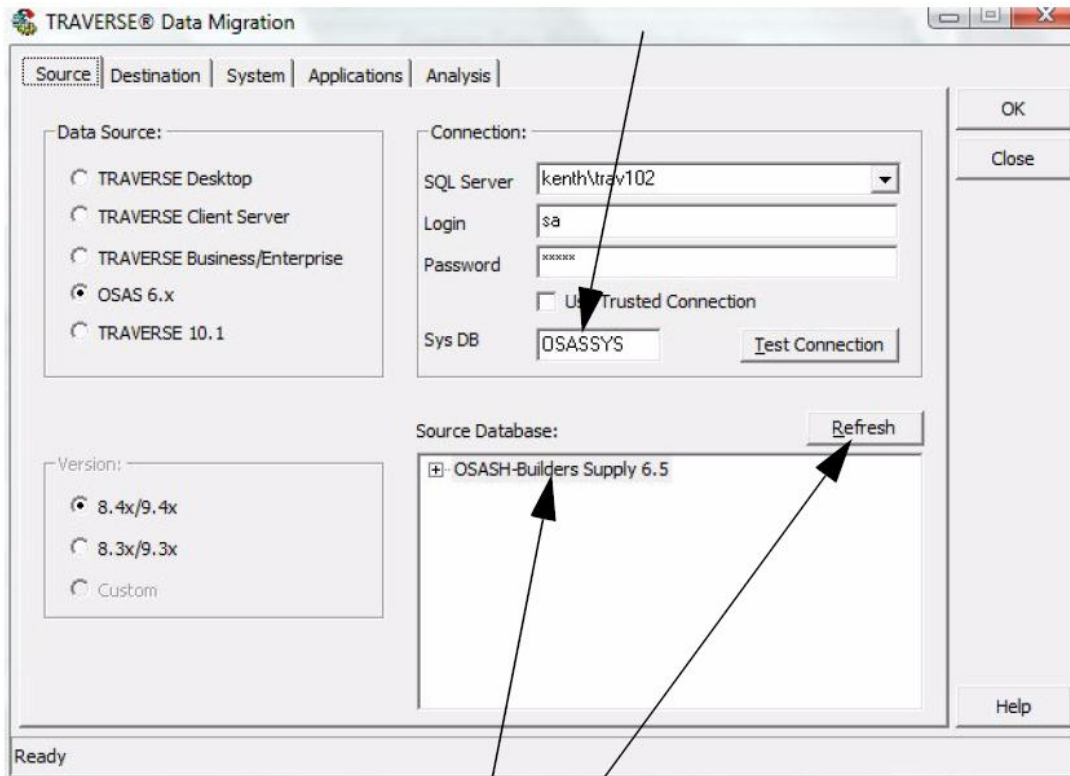
14. Click **Next** to continue. The TRAVERSE Data Migration Wizard–Finished! window appears.



15. Click **Finish**. The TRVERSE Data Migration dialog box appears.

The information that appears on the TRVERSE Data Migration dialog box comes from the selections you made while using the TRVERSE Data Migration Wizard.

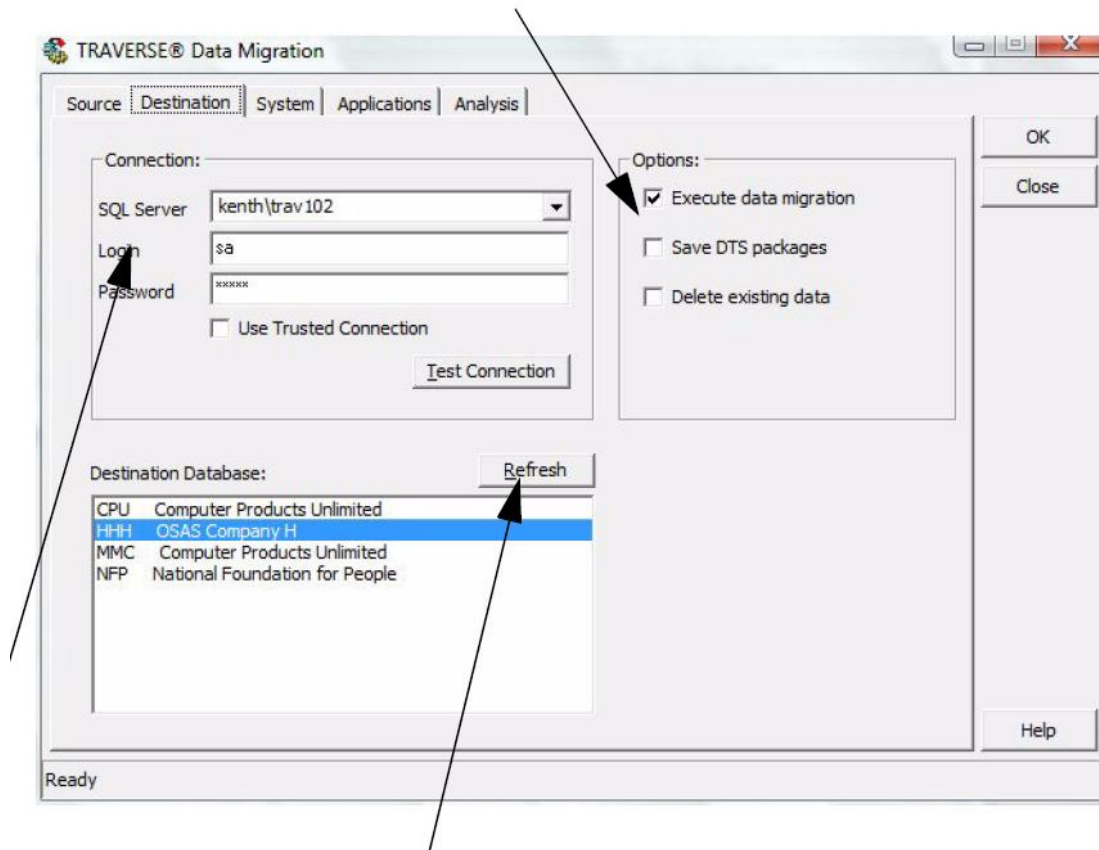
If your source data is Client Server, you can change the name of the System (OSASSYS) database. This is required if both source and destination databases reside on the same SQL Server machine.



If you change SQL Servers, click **Refresh** to refresh the information in the **Source Database** list box.

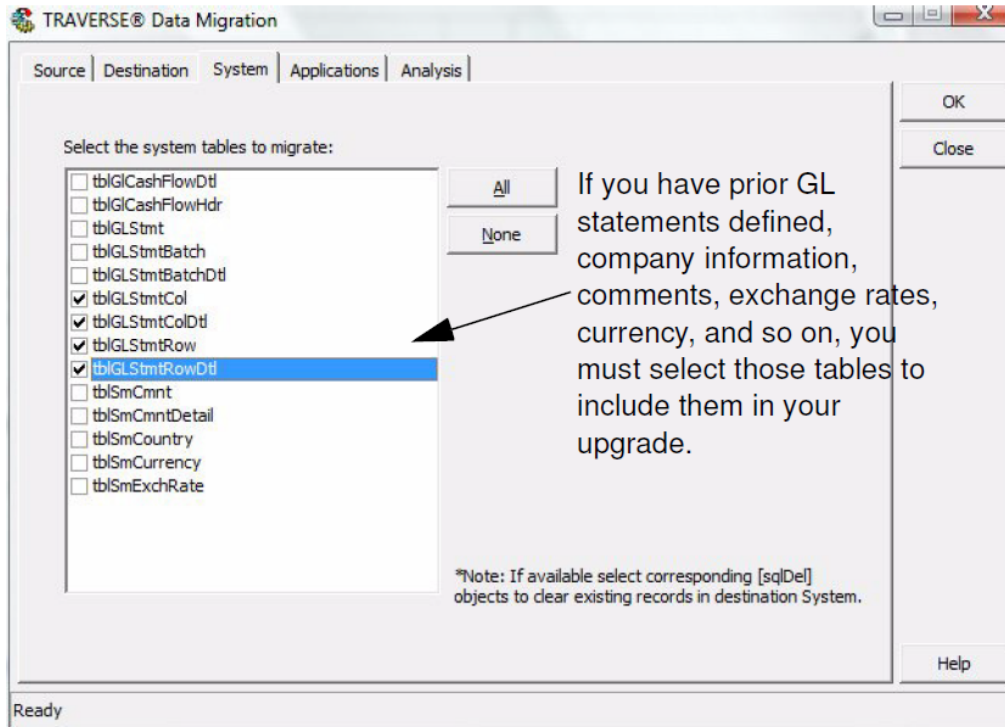
16. On the **Source** tab, make sure the source data information you specified is correct and make any necessary changes.
17. Click the **Destination** tab to check the destination data information you specified and make any necessary changes.
 - Select **Execute data migration** to create a DTS package and execute it immediately.

- Select **Save DTS Packages** to save the DTS package(s) to the destination server.

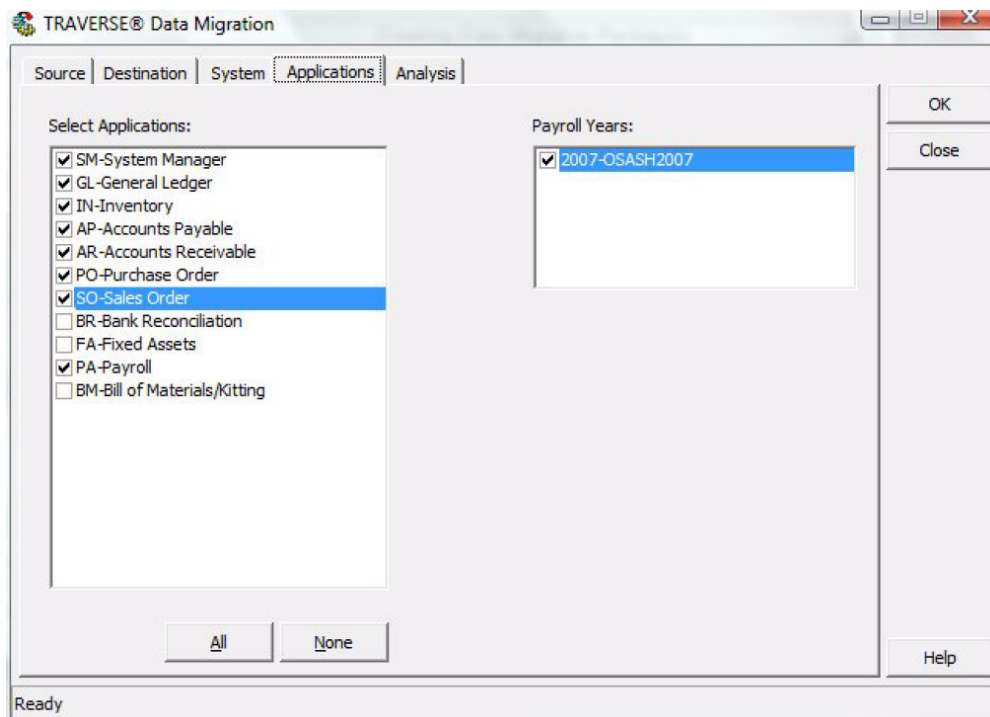


- If you change SQL Servers, click Refresh to refresh the information in the Destination Database list box.

18. Click the **System** tab to select which **SYS** tables you want to upgrade.



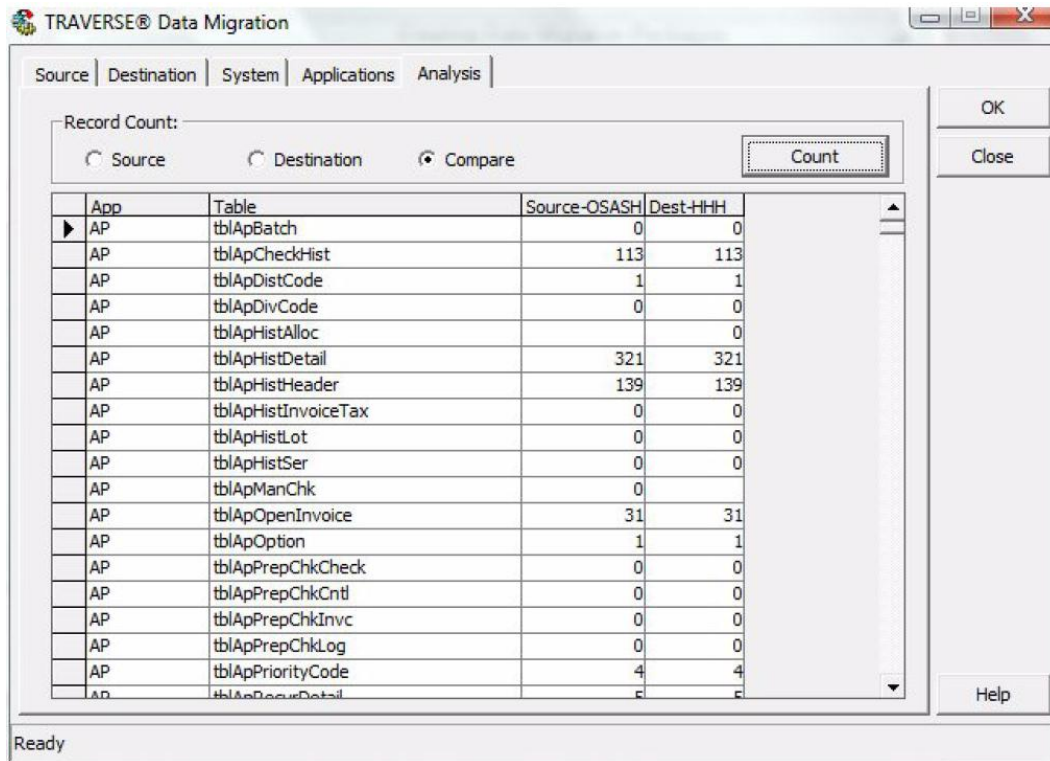
19. Use the **Applications** tab to select the applications and payroll data that you plan to migrate.



20. Click the **Analysis** tab to count the number of records in each table in your source or destination directory, or when finished compare the record counts for your source and destination. Use this function to compare the number of source files to the number of destination files to get an idea of how many records were or will be upgraded.

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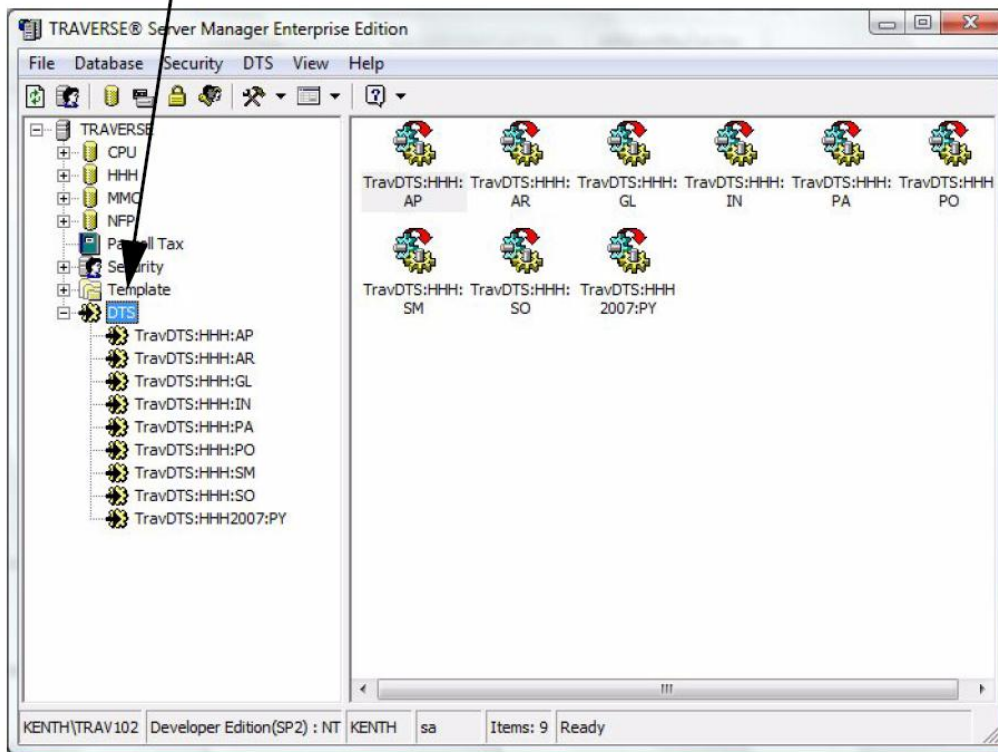


21. Click **OK** when you are finished with your changes to the TRAVERGE Data Migration dialog box.

- If you selected **Execute data migration** on the **Destination** tab, the data migration automatically begins. The Execute DTS Package dialog box appears and status messages appear in the list box section of the dialog box as the data is migrated. When finished, a message box appears, stating, "Data Migration completed. Refer to log for more information." Click **OK**. Click **Close** to exit the Execute DTS Package dialog box.
- If you selected **Save DTS Packages** on the **Destination** tab, your packages are saved. When finished, a message box appears stating, "DTS packages successfully saved on <destination SQL Server>." Click **OK**.
- If you selected both options on the Destination tab, the data migration automatically begins and your packages are saved. The Execute DTS Package dialog box appears and status messages appear in the list box section of the dialog box as the data is migrated. When finished, a message box appears, stating, "DTS packages successfully saved on <destination SQL Server>."
- A second message box appears, stating, "Data Migration completed. Refer to log for more information." Click **OK**. Click **Close** to exit the Execute DTS Package dialog box.

22. Click **Close** to exit the TRAVERGE Data Migration dialog box. The DTS packages are stored under DTS on the TRAVERGE Server Manager main window.

Click here it view the DTS packages.



The DTS Package naming convention is TravDTS, a colon, the database name (for example, RTW), another colon, and the Application ID (for example, FA for Fixed Assets): TravDTS:RTW:FA.

Desktop Migration Version 8.33/9.33 and 8.41/9.41

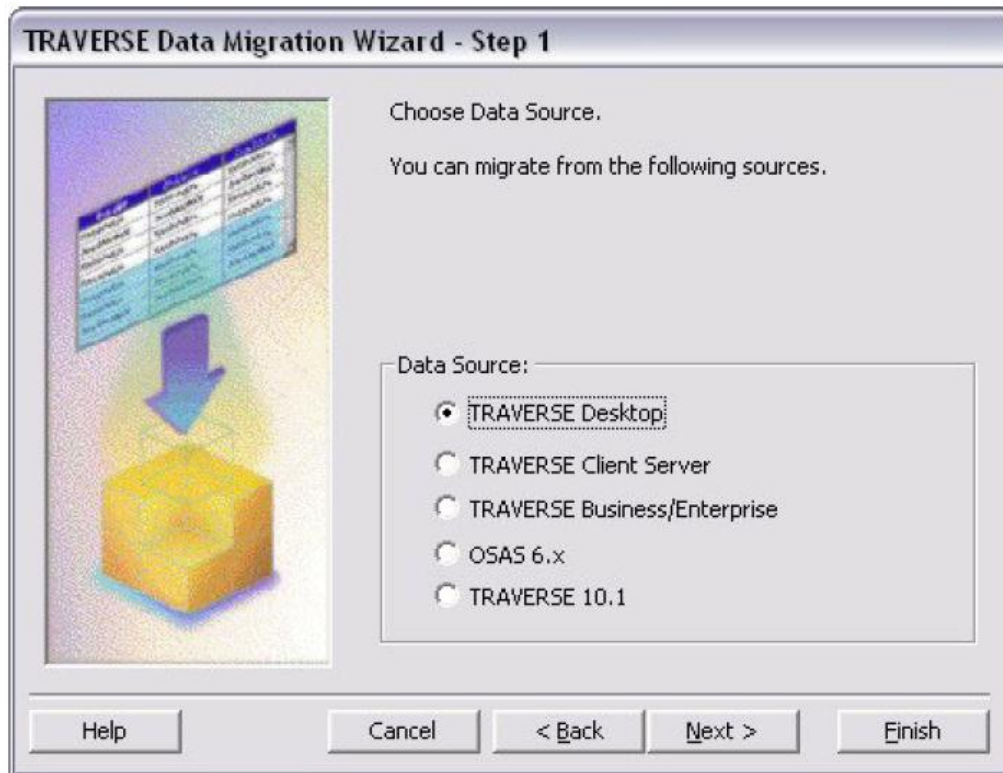
Note: To migrate from Versions prior to 10.1 you must first migrate to TRAVERGE version 10.1 or 10.2, then migrate from that version to 10.5.

Note: To migrate data from TRAVERGE versions 10.1 or 10.2 you must install a new instance of SQL 2000, MSDE, SQL2005 or SQL2005 Express for your TRAVERGE version 10.5 data you will be migrating into.

Note: To migrate data from TRAVERGE versions 10.1 or 10.2 you must install the 10.1 or 10.2 Server Manager and use this utility to make the SYS and company databases you will be migrating to 10.5. A 10.2 CD and temporary key can be provided to you by contacting the Open Systems sales department.

Note: You can click Cancel to exit the Data Migration Wizard or click Back to return to the last window at anytime when the options appear on the window.


1. After viewing the TRAVERGE Data Migration Wizard–Introduction dialog box, click **Next**. The TRAVERGE Data Migration Wizard - Step 1 window appears.



2. From the **Data Source** section of the dialog box, select **TRAVERGE Desktop**.
3. Click **Next** to continue. The TRAVERGE Data Migration Wizard–Step 2 window appears.

TRAVERSE Data Migration Wizard - Step 2

Provide the following information about the data source.



System Manager Path:

Specify path to **sysm1.trv** file:

D:\941\SYS\SYSSM1.TRV ...

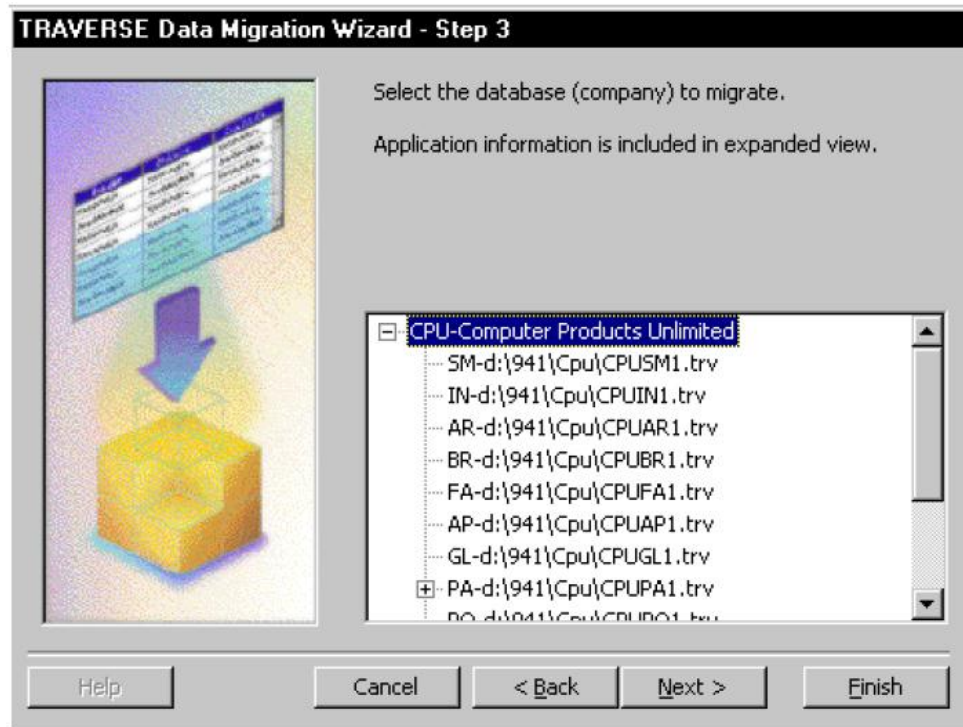
Specify path to MS Access Workgroup File (optional):

... ..

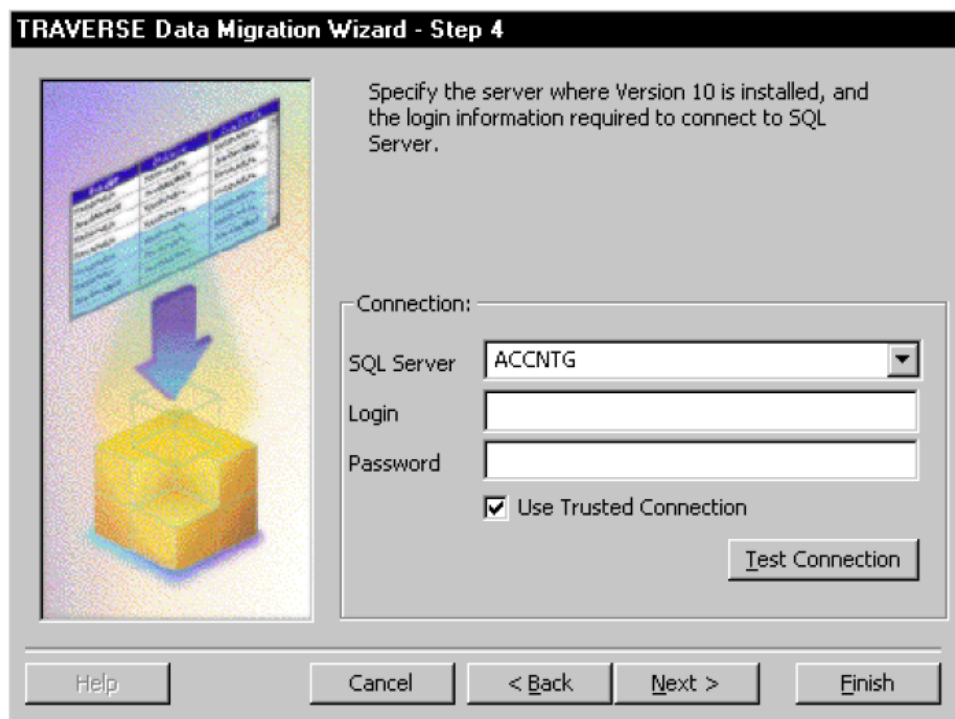
User Name: Password:

Help Cancel < Back **Next >** Finish

4. In the **Specify path to sysm1.trv file** text box, enter the **sysm1.trv** file path or use the browse button to locate the file.
5. If you have secured MS Access databases, specify the path to the MS Access Workgroup file. By default this is the **Traverse.mdw**.
6. Enter the **User Name** and **Password** required to open the MS Access database.
7. Click **Next** to continue. The TRVERSE Data Migration Wizard–Step 3 window appears.



8. Select the database that you want to migrate.
9. Click **Next** to continue. The TRAVERSE Data Migration Wizard–Step 4 window appears.



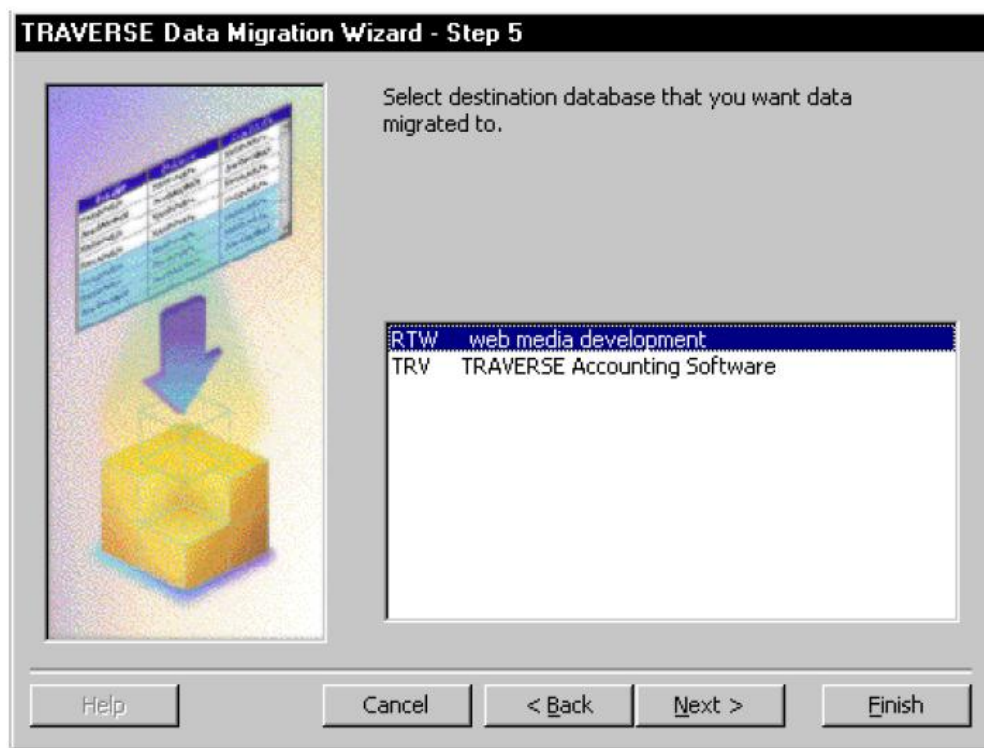
If you are currently logged in using a trusted connection, the Use Trusted Connection check box is selected.

10. From the **SQL Server** list box, specify the SQL Server where TRAVERGE version 10.2 is installed.
11. Specify the login information needed to connect to that SQL Server. For more information on logins, the Administrator's Guide section on Login and Security.

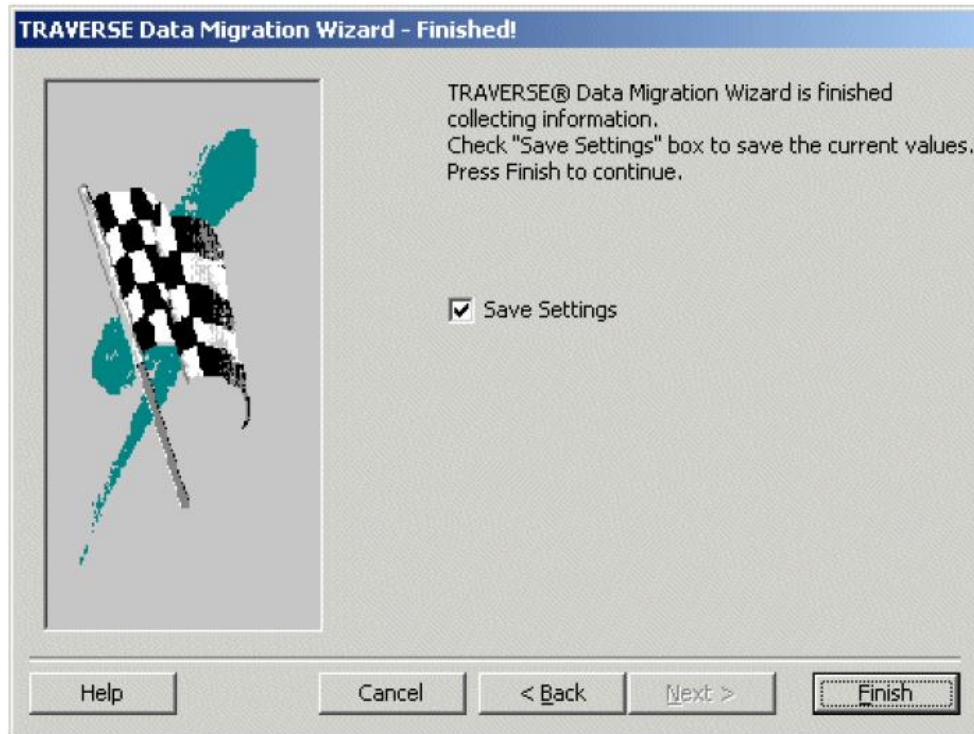
If the login for the SQL Server you specified requires SQL Server Authentication, enter the **Login** and **Password** (optional).

Optional: To test your connection to the SQL Server you selected and to validate if TRAVERGE 10.2 is installed on the destination server, click **Test Connection**. A message box appears confirming that your connection was successful or that the login failed.

12. Click **Next** to continue. The TRAVERGE Data Migration Wizard–Step 5 window appears.

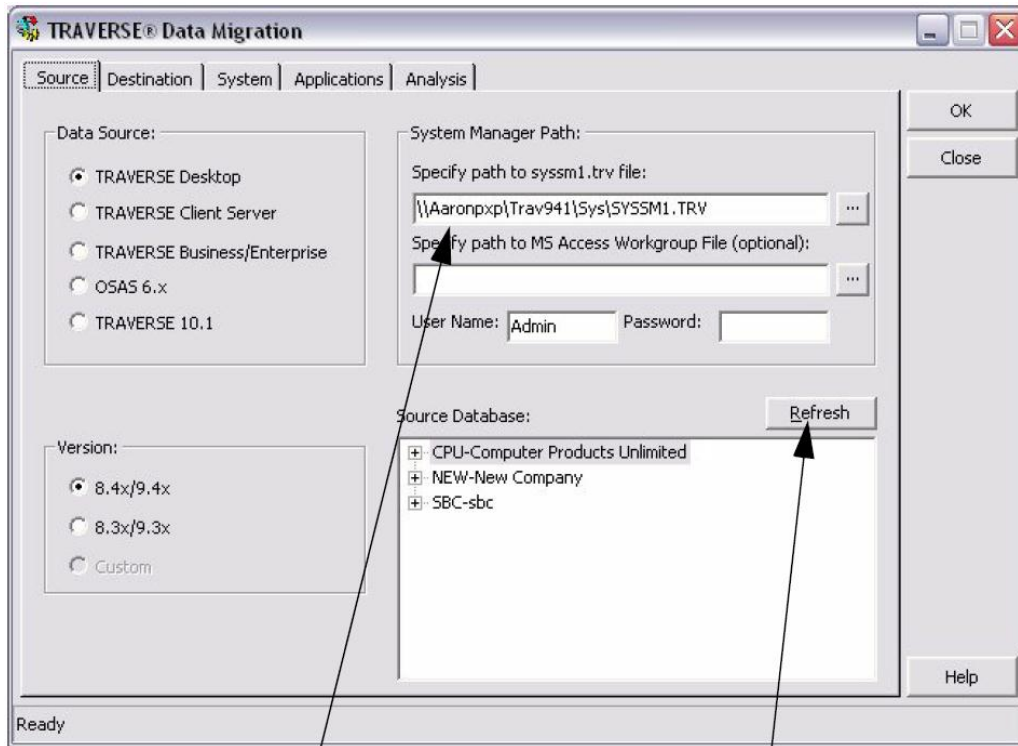


13. Select the company database where you plan to integrate the data.
14. Click **Next** to continue. The TRAVERGE Data Migration Wizard–Finished! window appears.



15. Click **Finish**. The TRAVERGE Data Migration dialog box appears.
16. On the **Source** tab, make sure the source data information you specified is correct and make any necessary changes.

The information that appears on the TRAVERGE Data Migration dialog box comes from the selections you made while using the TRAVERGE Data Migration Wizard.

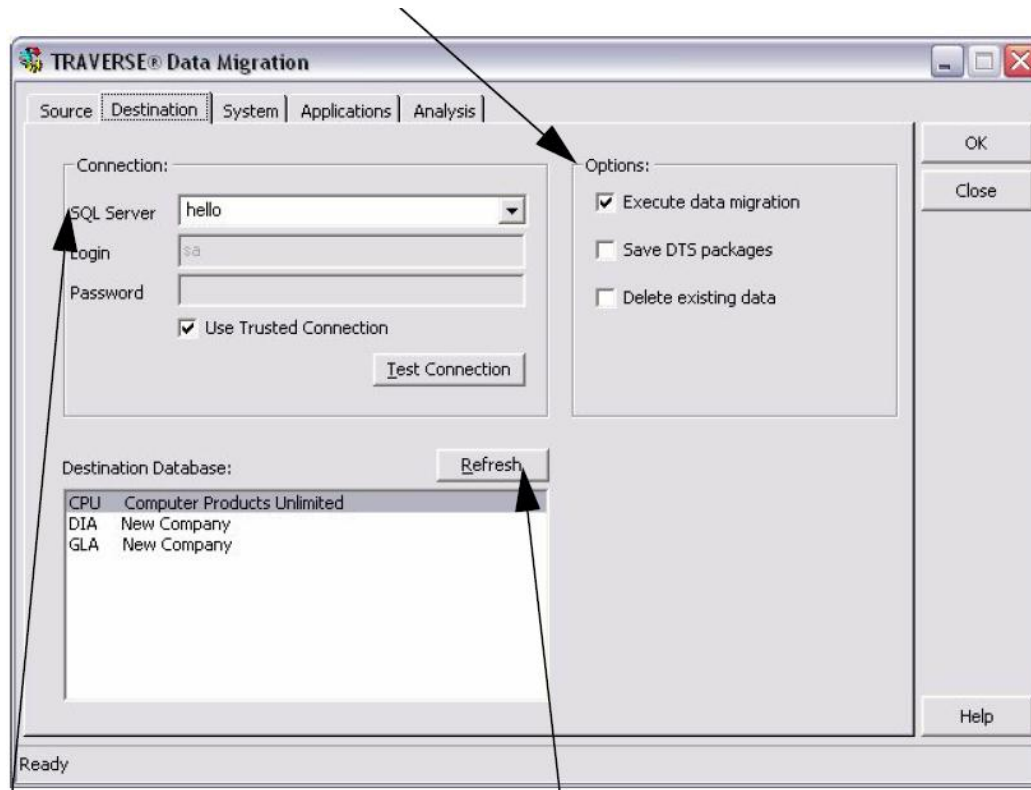


If you change the path, click **Refresh** to refresh the information in the **Source Database** list box.

17. Click the **Destination** tab to check the destination data information you specified and make any necessary changes.

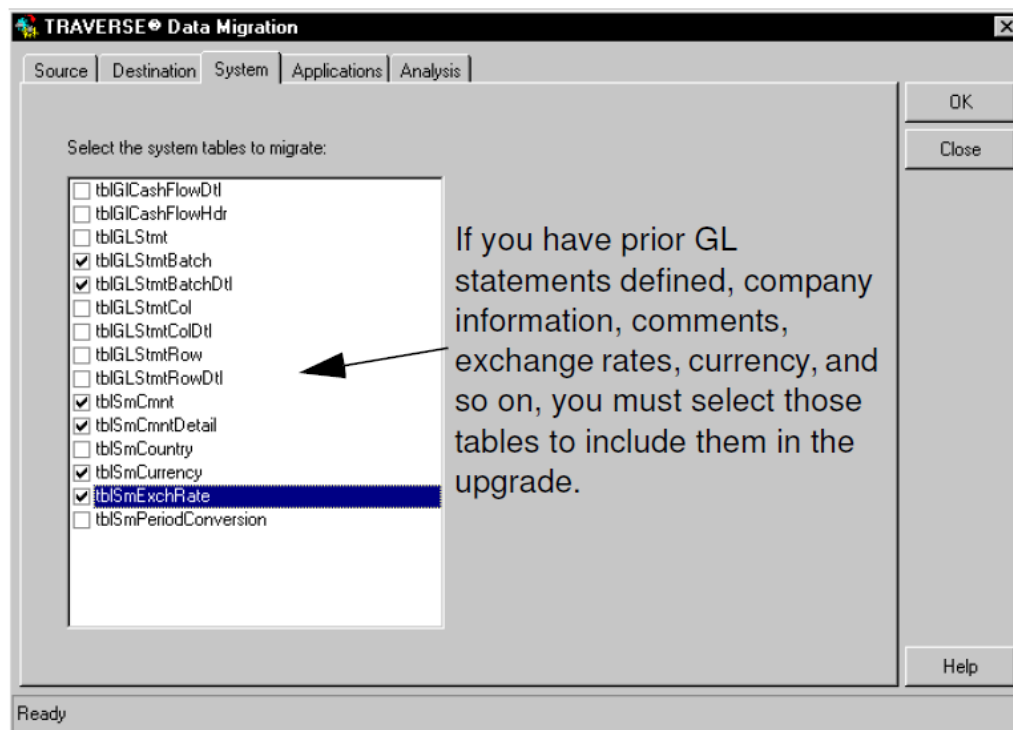
You can choose one or both of the options.

- Select **Execute data migration** to create a DTS package and execute it immediately.
- Select **Save DTS Packages** to save the DTS package(s) to the destination server.

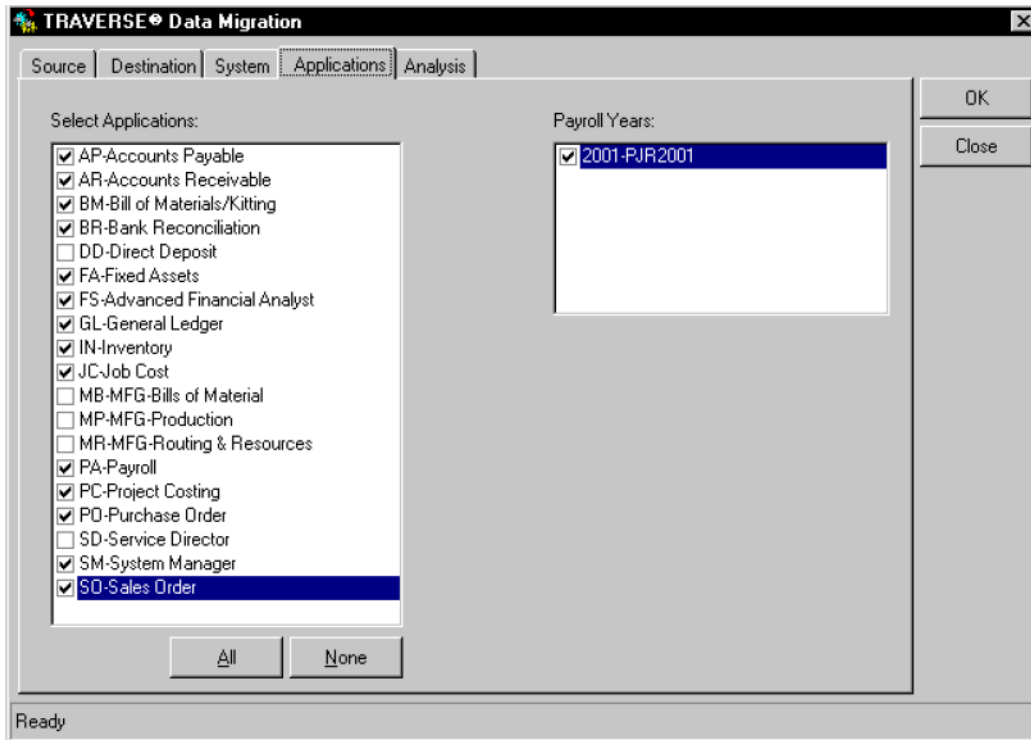


If you change SQL Servers, click **Refresh** to refresh the information in the **Destination Database** list box.

18. Click the **System** tab to select which **SYS** tables you want to upgrade.

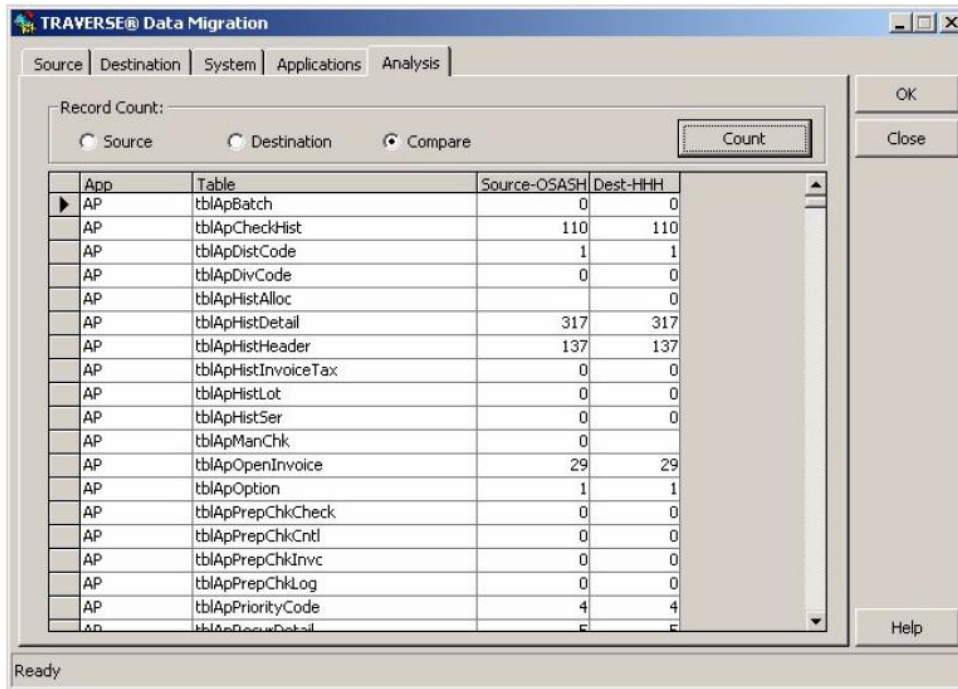


19. Use the **Applications** tab to select the applications and payroll data that you plan to migrate.



20. Click the **Analysis** tab to count the number of records in each table in your source or destination directory. Use this function to compare the number of source files to the number of destination files to get an idea of how many records were or will be upgraded.

Note: When migrating from the desktop version, explicit permission to the system tables in Microsoft Access is required. An error message is generated if that type of permission is not granted. In such cases, use the Set Permission button to grant the necessary permissions. This button is visible only when the program encounters the permissions error.



21. Click **OK** when you are finished with your changes to the TRAVERGE Data Migration dialog box.

If you selected **Execute data migration** on the **Destination** tab, the data migration automatically begins. The Execute DTS Package dialog box appears and status messages appear in the list box section of the dialog box as the data is migrated.

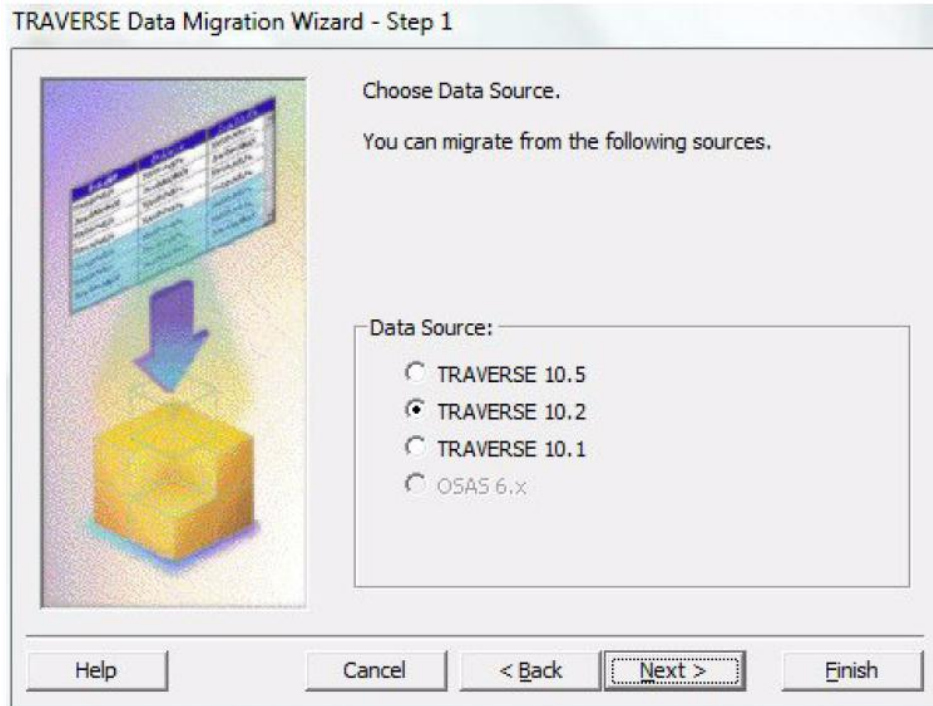
When finished, a message box appears, stating, "Data Migration completed. Refer to log for more information." Click **OK**. Click **Close** to exit the Execute DTS Package dialog box.

Version 10.1 and 10.2 Migration

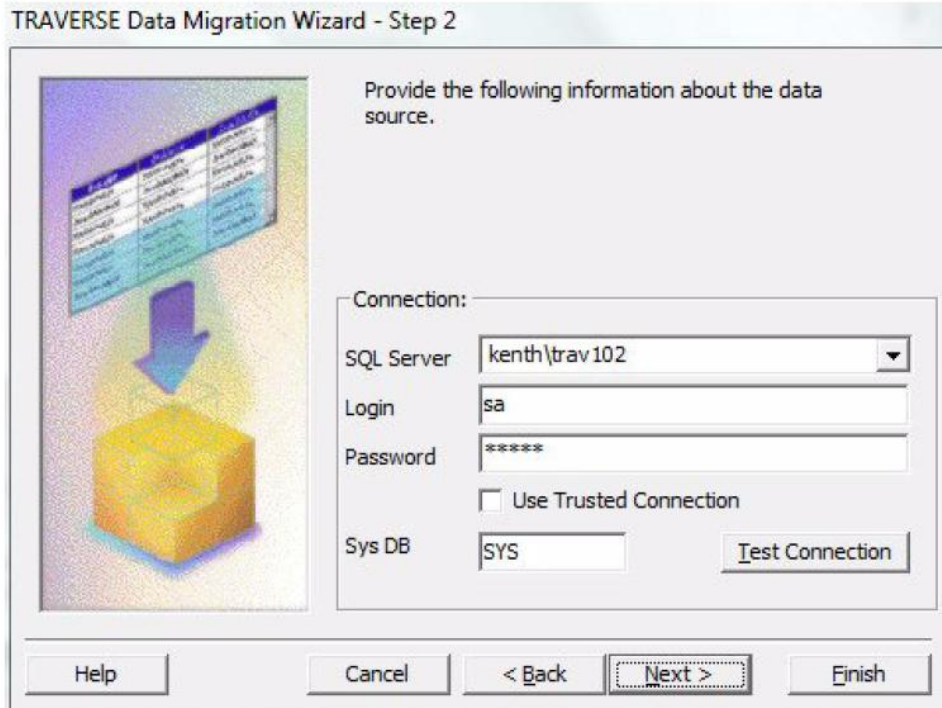
Note: You can click Cancel to exit the Data Migration Wizard or click Back to return to the last window at any time when the options appear on the window.

Note: Only use the 10.1 or 10.2 if migrating a 10.1 or 10.2 to 10.5. If migrating from 10.1 please select the TRAVERGE 10.1 option and if you are migrating from 10.2 select the TRAVERGE 10.2 option. If you are migrating a version 10.5 to another 10.5 company, select TRAVERGE 10.5.

1. After viewing the TRAVERGE Data Migration Wizard–Introduction dialog box, click **Next**. The TRAVERGE Data Migration Wizard–Step 1 window appears.



- From the **Data Source** section of the dialog box, select **TRAVERSE 10.1**, **10.2** or **10.5**. Click **Next** to continue. The TRVERSE Data Migration Wizard–Step 2 window appears.



If you are currently logged in using a trusted connection, the Use Trusted Connection check box is selected.

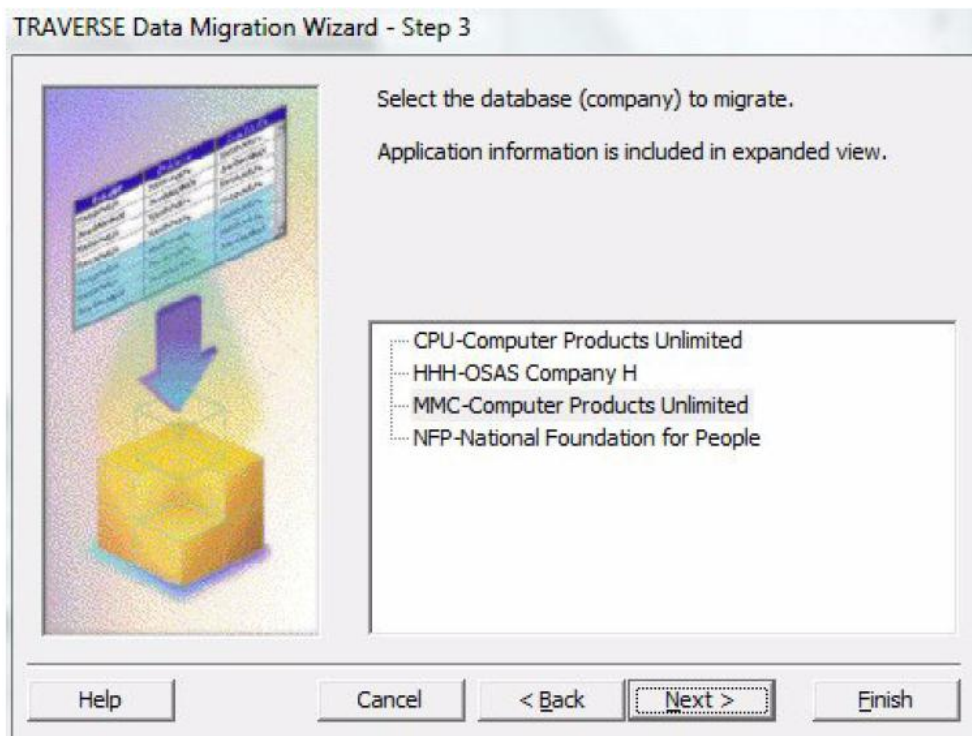
3. From the **SQL Server** list box, specify the SQL Server where the data is currently stored.
4. Specify the login information needed to connect to that SQL Server. For more information on logins, see the Login & Security section in the Administrator's Guide.

If the login for the SQL Server you specified requires SQL Server Authentication, enter the **Login** and **Password** (optional).

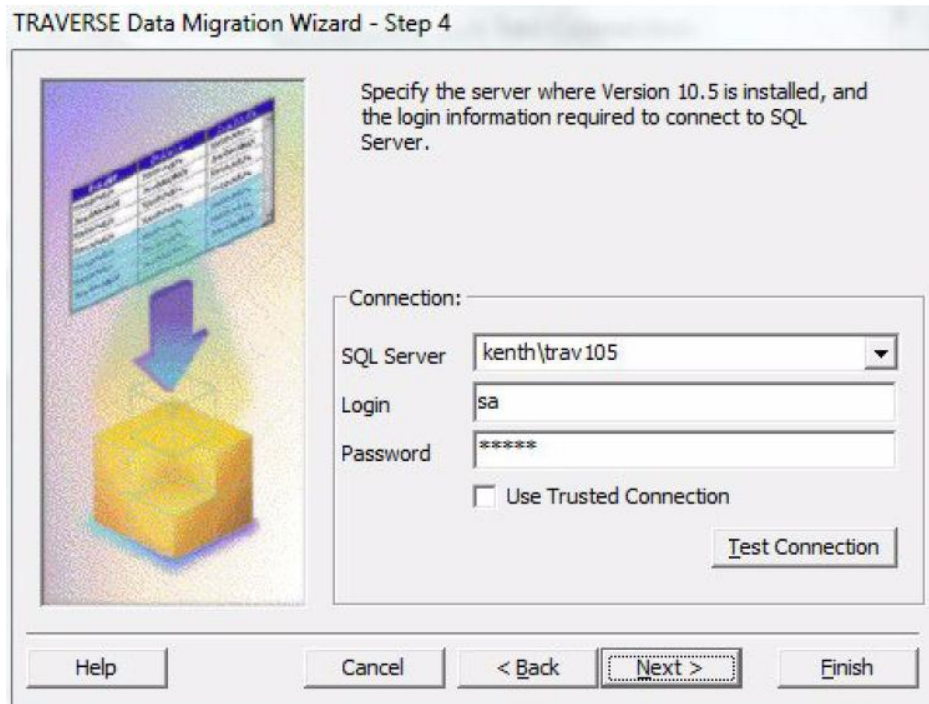
To test your connection to the SQL Server you selected (optional), click **Test Connection**.

A message box appears confirming that your connection was successful or that the login failed.

5. The **Sys DB** text box is used when installing TRAVERSE 10.5 Server Manager on an SQL Server machine currently running TRAVERSE 10.5. Enter **SYS**.
6. Click **Next** to continue. The TRAVERSE Data Migration Wizard - Step 3 window appears.



7. Select the database that you want to migrate.
8. Click **Next** to continue. The TRAVERSE Data Migration Wizard–Step 4 window appears.



If you are currently logged in using a trusted connection, the **Use Trusted Connection** check box is selected.

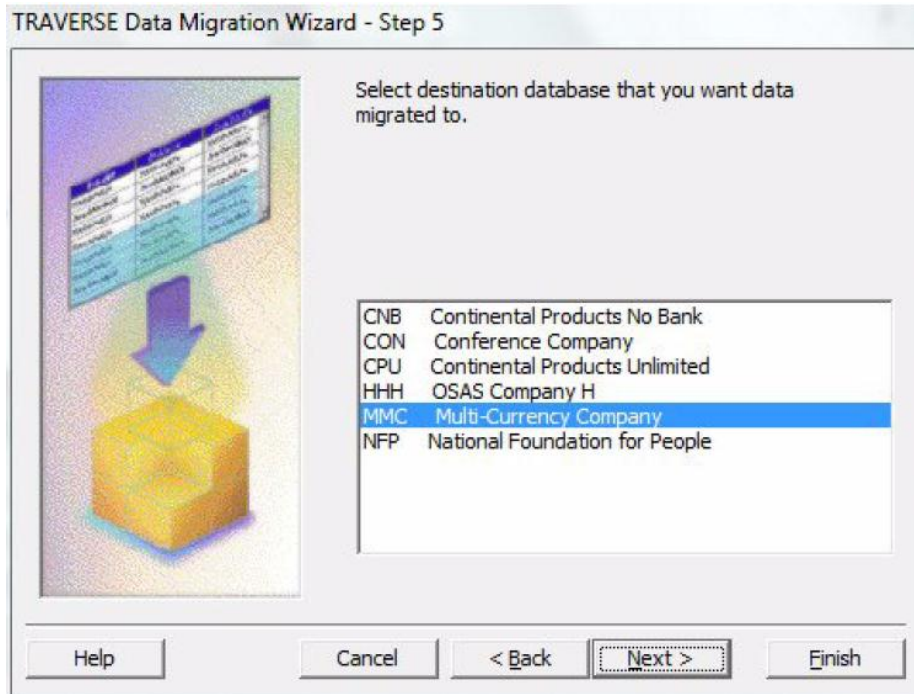
9. From the **SQL Server** list box, specify the SQL Server where TRVERSE version 10.5 is installed.
10. Specify the login information needed to connect to that SQL Server. For more information on logins, see page 5-3 of the Administrator's Guide.

If the login for the SQL Server you specified requires SQL Server Authentication, enter the **Login** and **Password** (optional).

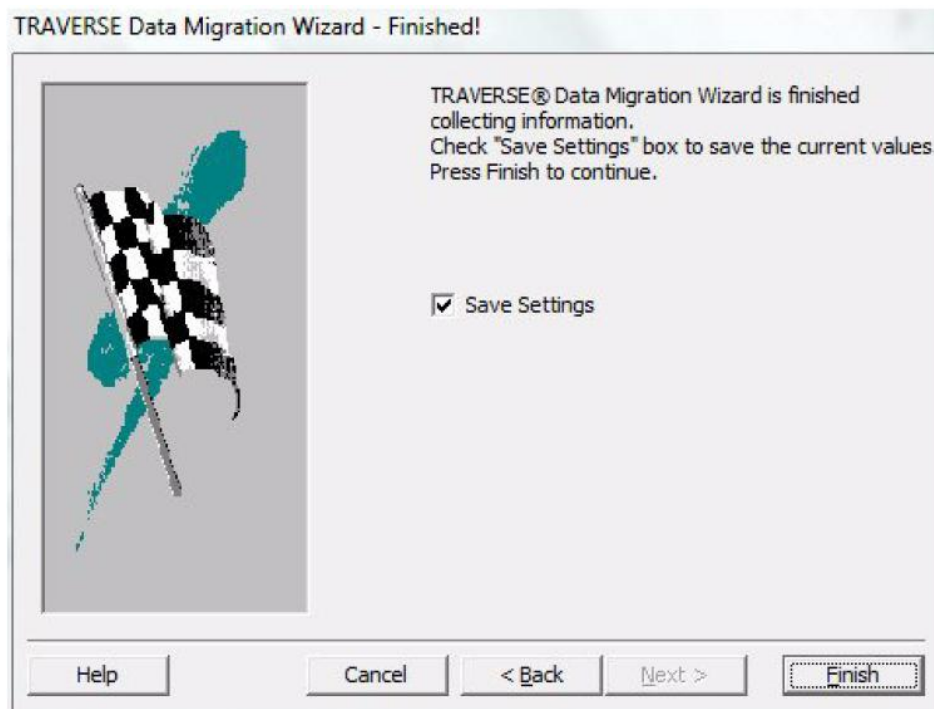
To test your connection to the SQL Server you selected (optional), click **Test Connection**.

A message box appears confirming that your connection was successful or that the login failed.

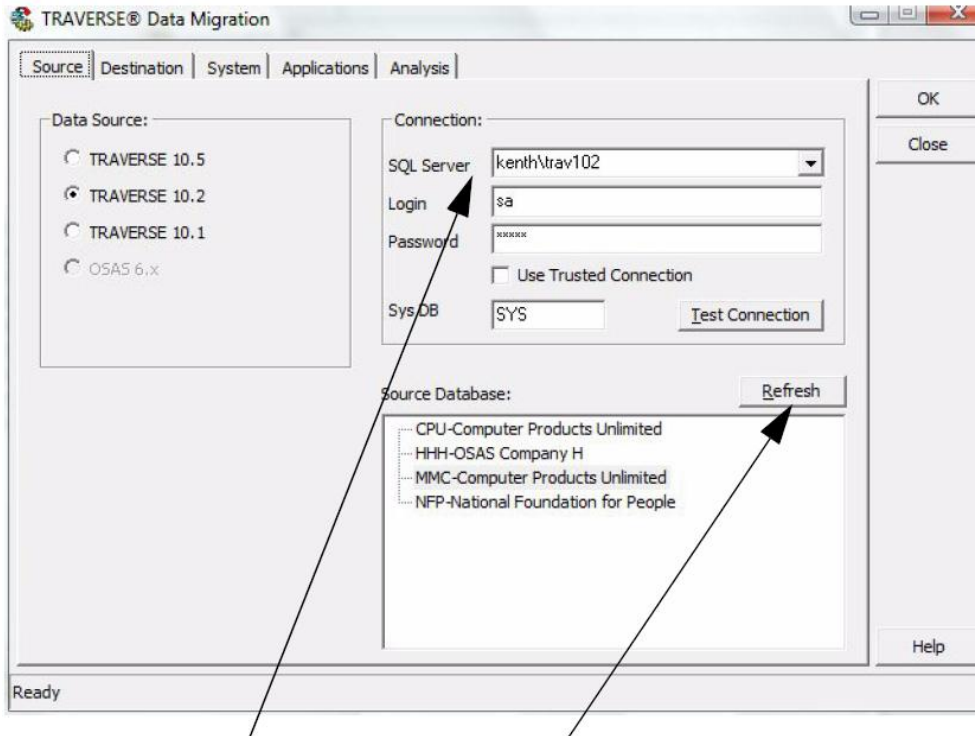
11. Click **Next** to continue. The TRVERSE Data Migration Wizard–Step 5 window appears.



12. Select the company database where you plan to integrate the data.
13. Click **Next** to continue. The TRVERSE Data Migration Wizard–Finished! window appears.



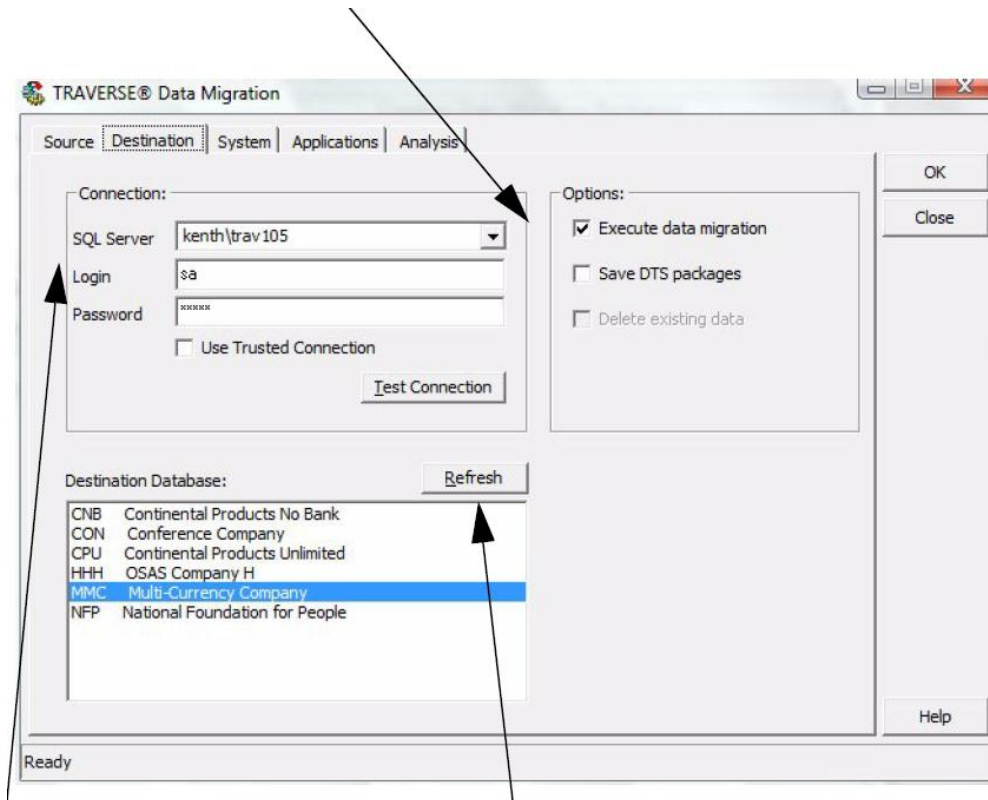
14. Click **Finish**. The TRVERSE Data Migration dialog box appears.



If you change SQL Servers, click **Refresh** to refresh the information in the **Source Database** list box.

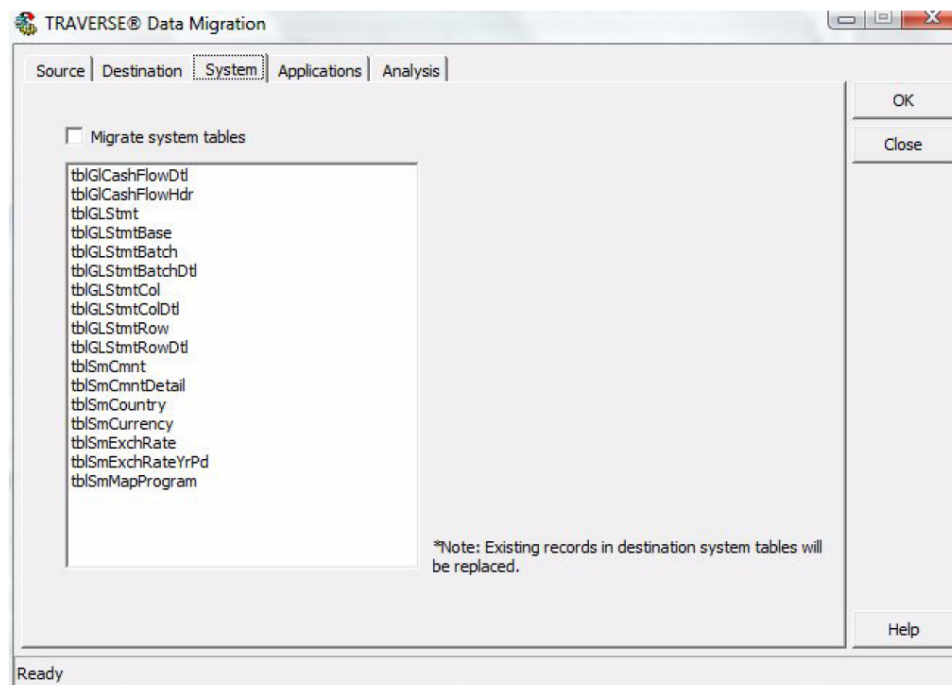
The information that appears on the TRAVERGE Data Migration dialog box comes from the selections you made while using the TRAVERGE Data Migration Wizard.

15. On the **Source** tab, make sure the source data information you specified is correct and make any necessary changes.
16. Click the **Destination** tab to check the destination data information you specified and make any necessary changes.
 - Select **Execute data migration** to create a DTS package and execute it immediately.
 - Select **Save DTS Packages** to save the DTS package(s) to the destination server.

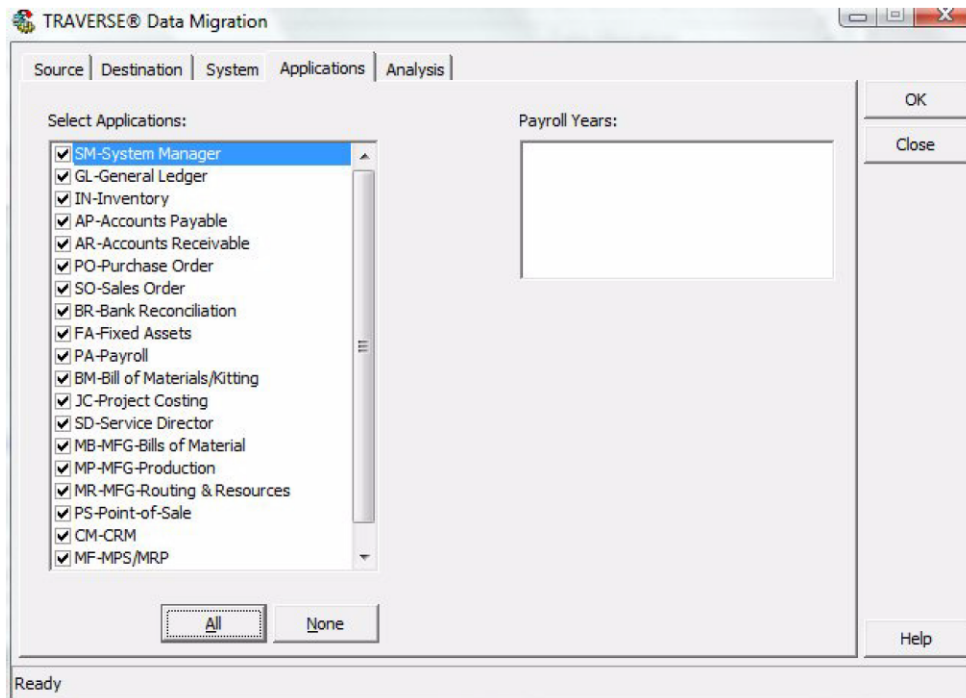


If you change SQL Servers, click **Refresh** to refresh the information in the **Destination Database** list box.

17. Click the **System** tab to select if you want the **SYS** tables to upgrade.

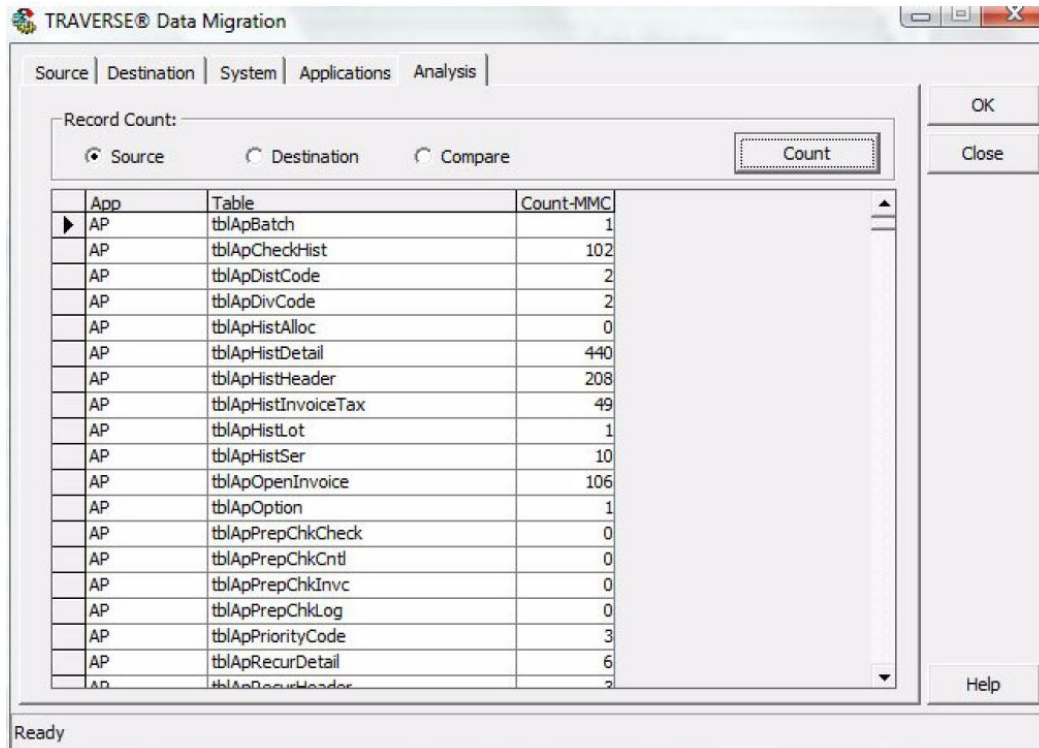


18. Use the **Applications** tab to select the applications and payroll data that you plan to migrate.



19. Click the **Analysis** tab to count the number of records in each table in your source or destination directory or when completed compare the record counts between your source and destination.

Use this function to compare the number of source files to the number of destination files to get an idea of how many records were or will be upgraded.

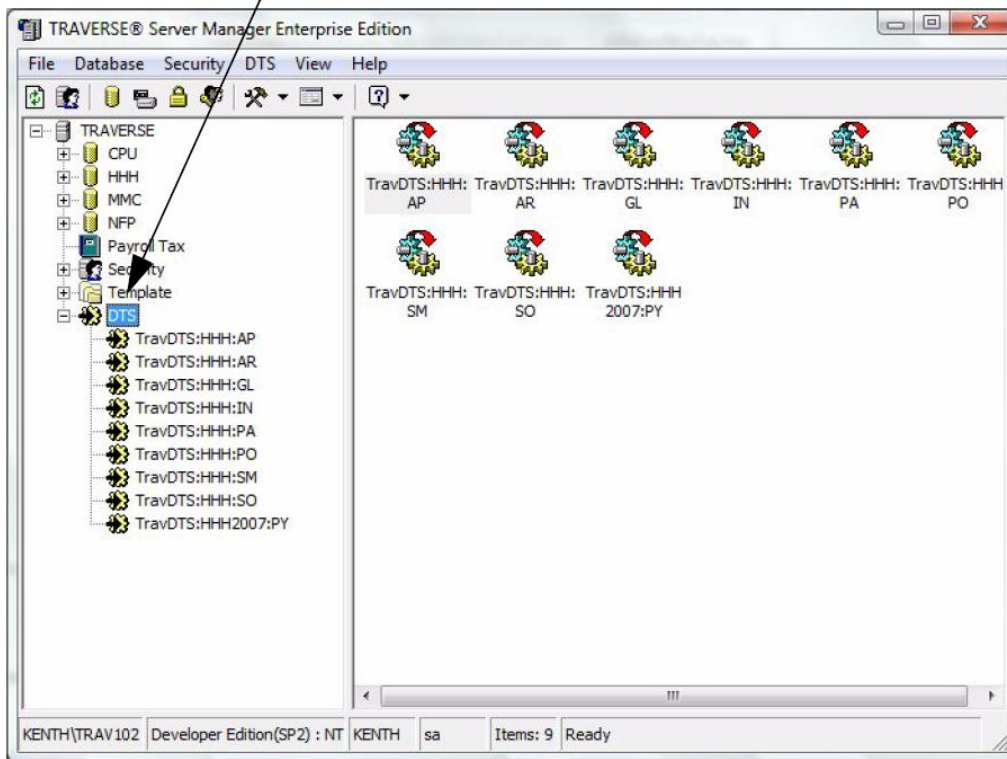


20. Click **OK** when you are finished with your changes to the TRAVERGE Data Migration dialog box.

- If you selected **Execute data migration** on the **Destination** tab, the data migration automatically begins. The Execute DTS Package dialog box appears and status messages appear in the list box section of the dialog box as the data is migrated. When finished, a message box appears, stating, "Data Migration completed. Refer to log for more information." Click **OK**. Click **Close** to exit the Execute DTS Package dialog box.
- If you selected **Save DTS Packages** on the **Destination** tab, your packages are saved. When finished, a message box appears stating, "DTS packages successfully saved on <destination SQL Server>." Click **OK**.
- If you selected both options on the Destination tab, the data migration automatically begins and your packages are saved. The Execute DTS Package dialog box appears and status messages appear in the list box section of the dialog box as the data is migrated. When finished, a message box appears, stating, "DTS packages successfully saved on <destination SQL Server>."
- A second message box appears, stating, "Data Migration completed. Refer to log for more information." Click **OK**. Click **Close** to exit the Execute DTS Package dialog box.

21. Click **Close** to exit the TRAVERGE Data Migration dialog box. The DTS packages are stored under **DTS** on the TRAVERGE Server Manager main window.

Click here to view the DTS packages.



The DTS Package naming convention is **TravDTS**, a colon, the database name (for example, **RTW**), another colon, and the Application ID (for example, **FA** for Fixed Assets): **TravDTS:RTW:FA**.

Executing DTS Packages

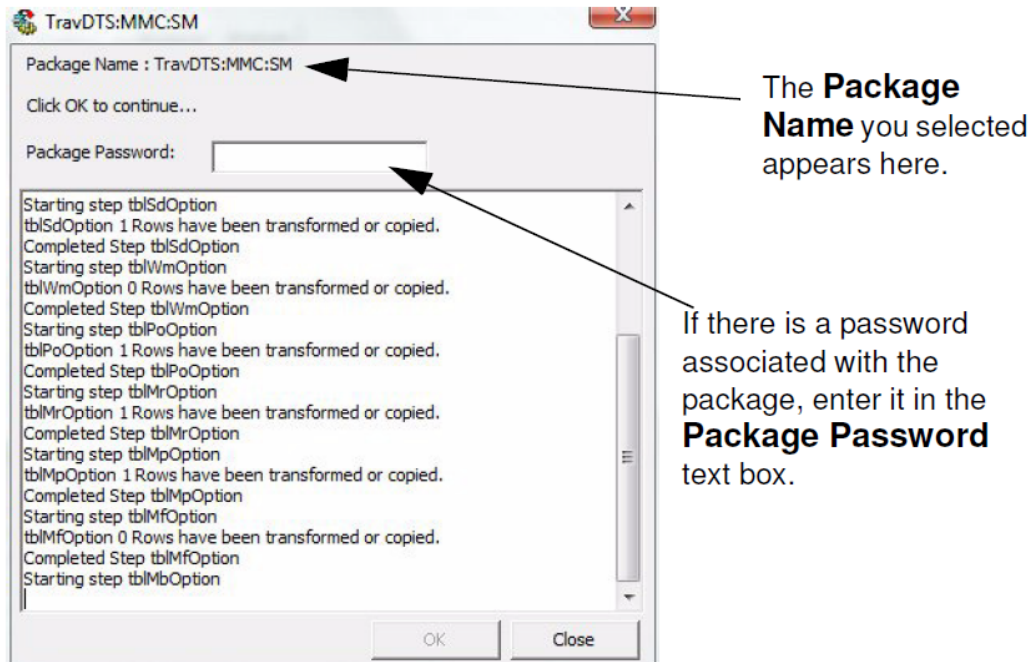
If you did not automatically execute your DTS packages while using the Data Migration Wizard, once you create your DTS Packages, you must execute the packages in order to perform the final data migration. (For more information, see (page 2-5))

To execute a DTS Package, follow these steps:

1. From the left column of the TRAVERGE Server Manager main window, click the **DTS** icon to view the available saved packages.

Click here to view the DTS packages.

2. Right-click a package and select **Execute** from the right-click menu. The Execute DTS Package dialog box appears.



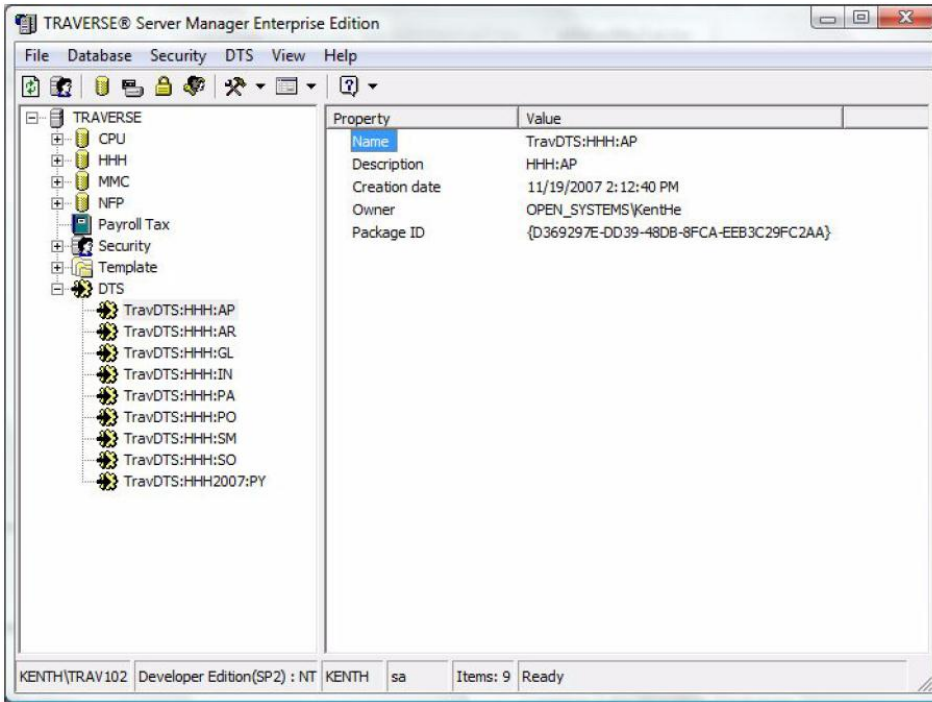
3. Click **OK** to migrate the data. Status messages appear in the list box section of the dialog box as the data is migrated.
4. When the migration is complete, a message box appears, stating, "Data Migration completed. Refer to log for more information." Click **OK**.
5. Click **Close** to exit the Execute DTS Package dialog box.

Note: If you would like to customize your DTS Package, see Microsoft SQL Server Enterprise Manager Online Help for information.

The **Package Name** you selected appears here. If there is a password associated with the package, enter it in the **Package Password** text box.

View DTS Package Properties

In the left column of the Server Manager main window, expand **DTS**. Right-click on the package you want to view information about and select **Properties** from the right-click menu. Package information appears in the right column of the main window.



Delete a DTS Package

To delete a DTS package, follow these steps:

1. In the left column of the main window, expand **DTS** and locate the package you want to delete.
2. Right-click on the package and select **Delete** from the right-click menu. A message box appears asking if you are sure you want to delete the DTS Package.
3. Click **Yes** to delete it. The package should be removed. Click **No** to cancel the action.