

# Sedona-X Mobile - Technician Migration

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## Prerequisites

Before technicians can be migrated over from the old FSU platform, the following prerequisites must be completed.

1. The [Sedona-X Mobile - SedonaCloud Setup for Sedona-X Mobile](#) guide must be completed.
2. Old technician records in SedonaOffice need to be updated with a unique email and a new role specified.
  - a. When the latest version of SedonaCloud is installed, it creates two new fields in SedonaOffice on the [dbo].[SY\_FSUWeb\_Technician] table. The following columns are added:
    - i. EMail - This is the email that will be used to create a new application user in SedonaCloud. It needs to be current and unique.
    - ii. RoleGroup - A number that represents the specific role that the technician rates.
      - i. Predefined Role Groups loaded into Sedonacloud. These cannot be modified/expanded.
        - i. (1) Jr. Tech
        - ii. (2) Subcontractor
        - iii. (3) Sr. Tech
        - iv. (4) Project Manager
        - v. (5) Manager
      - ii. Optional: Additional role groups can be customized by the customer in the SedonaCloud Host Portal => Role Groups page.
      - iii. Too many roles defined in a role group will result in login issues.
  - b. To make the migration as simple as possible, it's recommended that the current technicians in SedonaOffice are exported from [dbo].[SY\_FSUWeb\_Technician] table to Excel, then handed to the customer to populate the Email and RoleGroup fields for each technician.

- i. Exporting from to Excel can be done in a couple of ways.
  - i. Copy and Paste
    - i. Select \* From [dbo],[SY\_FSUWeb\_Technician].
    - ii. Select all the data in the results window
    - iii. Right click and click "Copy with Headers"
  - ii. SSMS Export tool
    - i. Open the Export Wizard
    - ii. Select the correct datasource, server and database
    - iii. Choose Excel as the destination
    - iv. Select only the SY\_FSUWeb\_Technician table
    - v. Select Next to finish out the wizard
- iii. Once the emails and roles have been collected from the customer, they can be imported back into SedonaOffice via SQL script or by editing the SQL Table [dbo].[SY\_FSUWeb\_Technician]

Data integrity must be verified by Bold Group to ensure the conversion is successful

## Run the Migration Tool

The migration tool is built into the Host Portal of SedonaCloud.

1. Login to the Host Portal of the customer's SedonaCloud installation.
2. Click on the "Companies" link in the top navigation
3. Locate and edit the correct SedonaOffice company you want to migrate the technicians over from
4. Check the "Migrate FSU Technician" checkbox.
5. Click submit
6. Verify all technicians have been migrated over.

- a. Click on the "Users" link in the top navigation
- b. Check the filter "Company Users" in the Users grid
- c. Verify all technicians have been ported over.

All technicians will have a default password of Admin123\$. This can be reset by the technician or SedonaCloud system administrator.