

SedonaOffice Standard Conversion Steps

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Live Conversion Process (New Customer):

The data conversion process is an approximate six-week process of working directly with the customer to convert their data from their legacy system to a Sedona Office database. The details may vary based on the customer's needs, but the basic process is the same for all new customers.

Data Conversion Process C1 Pass:

1. Retrieve the customers empty, set-up database from the server.
2. Restore the database on to your personal workstation. Call the database [CompanyName]C1.
3. Restore source database or create source database and call the database [CompanyName]Source.
 1. If the source data is a CSV source(including the Master Template document), you will need to create the database, then import the tables using the SQL import wizard.
4. Restore Master Template Database(found in Data Conversion Team files) Call the database[CompanyName]Work.
5. Modify the Stored procedure [From_Excel_Import_To_Tables]
 1. This stored procedure is preset to automatically pull data from the Master Template format and insert it into the work data.
 2. If you are using a different source, you will need to map the data for each of the tables being inserted into.
6. Execute [From_Excel_Import_To_Tables] on [CompanyName]Work which inserts the data from the source database into the work database.
7. Execute [Validate_Source_Data] on [CompanyName]Work database. This will ensure that there is no orphaned data such as sites that do not connect to a customer, or any duplicates. Make adjustments as needed.
8. Modify [Conversion_To_Sedona_Office] Follow the instructions in the comments. NOTE: ONLY ALTER THE STORED PROCEDURE WHERE THE COMMENTS TELL YOU. THIS IS A STATIC SCRIPT

9. Execute [Conversion_To_Sedona_Office] on [CompanyName]C1. This will import the data properly into the customers Sedona database.
10. Execute [Missing_Setup_Records] on [CompanyName]C1. This will provide a list of setup records that were in the data but did not have direct mapping to setup tables in Sedona office. Provide this list to the customer. They will either need to provide mapping or will need to create the setup items prior to the C2 conversion.
11. Execute [Post_Conversion_Stats] on [CompanyName]C1. This will give an exact count of all of the items being imported into Sedona office. Provide this list to the customer so they can compare to their source.
12. Execute [Validate_Imported_Data] on [CompanyName]C1. This will look for any errors or warnings that may need to be fixed before uploading the database to the customer's server. If adjustments need to be made. Go back to step 5.
13. Back-up [CompanyName]C1 and upload to customers server.
14. Restore [CompanyName]C1 onto customers SQL server

1. NOTE: DO NOT REPLACE ORIGINAL DATABASE. EVERY CONVERSION PASS NEEDS A FRESH DATABASE, AND THE CUSTOMER WILL MOST LIKELY NEED TO ADJUST SETUPS BETWEEN PASSES

15. Add the database as a company in SedonaMaster database. Name the company [CompanyName] Sandbox.
16. Log into Sedona Office and validate that all data can be seen without any errors.
17. Send Customer email confirming that the C1 pass has been completed.
18. Customer will have up to two weeks on the first pass to review the data in Sedona Office which will also coincide with training by the Application Consultant.
 1. This will also be when the customer can make modifications to the source data as well as adding or changing any setup tables in Sedona Office
 2. Future passes will need to be reviewed in a week or less in order to follow project plans.
19. Customer will send list of changes needed for the next pass.

Data Conversion Process C2 and C3 Pass:

1. Repeat all steps in pass 1. You will most likely need to make adjustments to the [From_Excel_Import_To_Tables] Stored Procedure based on the notes from the customer.

1. You can reuse the [CompanyName]Work database, but [CompanyName]Source will need to be replaced with new data from the customer, and the new SedonaOffice database will be named [CompanyName]C2/[CompanyName]C3.
2. Make sure to follow the notes in the Stored procedures to ensure that the scripts point to the proper databases.
2. Ideally the customer will be satisfied with the import by the end of the third pass, but they may need extra passes. Work with the project manager to schedule more passes if need.
3. Once the customer has said in writing that they are satisfied with the pass begin the Go - Live procedure.