

LedgerKey Database Migration Utility Quick Start

Note: Before you run the Database Migration Utility to move the data from the old to the new applications, you'll need to create a *location* for the new database. The easiest way to do this is from within the application. Just select **File > Company** and **File > New** (from the Open-Company dialog). We have a separate document titled "Adding New Companies" that walks you through this.

Another method is to simply copy an existing folder and database. (We create your first one when we install the application.) Just use standard Windows techniques: Point to the folder you want to copy; right-click and select **Copy**; point to the location where you want the new database; right-click and select **Paste**; and finally, right click at the new copy, select **Rename**, and enter the new name for the database (usually an abbreviated version of the company name).

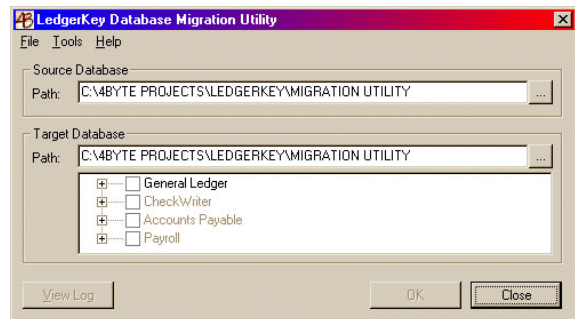
Here is a minimal guide to converting an MSDOS-based LedgerKey database into LedgerKey Version 5.x for Microsoft Windows and the Microsoft Jet4 database engine:

1. Launch the Database Migration Utility.

Just click the icon on your desktop.

A window should open very much like this:

In the box titled "Source Database" is the path leading to the MSDOS LedgerKey database, the folder containing the *.DBF and *.DBT files.



The path in the "Target Database" box points to the folder with the Windows (Jet4) LedgerKey database. In the same box below the path are a treed series of checkboxes you will use to designate which parts of the database you want to migrate.

2. Point the application to the source database.

Click the [...] button in the "Source Database" box and browse to the drive and path or folder containing the original MSDOS *.DBF and *.DBT files of the old LedgerKey database. Click on one of the files to select the path.

3. Point the application to the target database

As in #2, click the [...] button in the “Target Database” box and browse to the drive and path or folder containing the new Windows LedgerKey database. Click on “LedgerKey.mdb” to select the path.

4. Clear the target database (optional).

Normally, you will be migrating data to a new database. If you are *adding* data (say, for a previous year or after a previous partial migration), skip this step.

To clear any previous data, select **Tools > Empty Database** and the portion of the database you are about to build.

The first time you run this application on a database, you will probably want to clear all three parts: Payroll, Accounts Payable, and General Ledger.

5. Check off the portions of the database you want to migrate.

In the “Target Database” box, click the + box at the right of a section (or double-click the title of the section) to open options within it. Click the checkbox next to the portion of the database you want to migrate.

6. Click OK to start the procedure.

Note: If you cleared the existing LedgerKey database, there is normally no need to back it up. If you are *adding* to an existing database, you will want to protect your existing data. If you have not already backed up with the LedgerKey application, you can do so now by selecting **Tools > Backup** before proceeding.

Note: For certain portions of the general-ledger database, you will have to designate the fiscal year for the source data. The application will not let you enter a fiscal year for which data already exist.

The application will show a status box with messages showing its progress. A progress bar will move from left to right indicating how far through a given file it's gone.

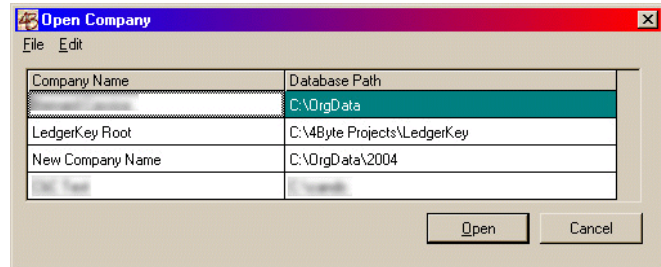
7. Close the Database Migration Utility.

When you have completed migrating data, select **File > Exit** or press **Ctrl+X** or click the control box (the button with the “X” in the upper right of the application window to close the Migration Utility.

8. Add the company to the application.

To change the “current company”, launch the application and select **File > Company**.

You will see a window similar to this:



Note: If **File > Company** is disabled, please call us, and we’ll walk you through enabling this function.

Since the company you just migrated is not on the list, you will need to add it. Select **File > New** or press **F3**.

Click the [...] button next to “Directory Path” and find the folder you created before you migrated the data (see above). Edit the company name, if you like. You can always change this from the application later.

When you have selected the folder containing the new company database, click **OK**. Note that the application has added the new company to the list. You can now select it, or any of the other companies in the list, by pointing to it and clicking **Open**, or by double-clicking on it, or by highlighting it and pressing **Enter**.