

A young woman with dark hair and bangs, wearing a purple shirt under a grey and white striped cardigan, is smiling broadly and shaking hands with someone whose arm is visible on the left. The background is a bright, slightly blurred indoor setting.

Upgrading Timesheet Xpress

A guide to migrate from Version 8 to newer releases

Upgrading from version 8 Timesheet Xpress

Timesheet Xpress is designed for small and medium sized enterprises (SMEs). The product can be used stand alone or networked, indeed Please ensure you are familiar with your current infrastructure and network and/or get a colleague to help.

Follow these procedures to ensure a smooth upgrade process

- 1) Backup the Timesheet Xpress network (shared data) folder and all its contents.
- 2) Close the program on all PCs.
- 3) On one PC, download and install the latest version from www.TimesheetXpress.com
- 4) Open the program, and follow the instructions, read the item , re. migration, at the bottom of this email.
- 5) When working, install the program on all other PCs.
- 6) We will send a spreadsheet and you input the PPNs, then we will issue new PKs.



PLEASE ENSURE YOU READ AND UNDERSTAND:-

Migrating '2 Tier' CPT List from Older Versions to Version 9 ('3 Tier').

If you are a user of a Timesheet Xpress version lower than version 9, then you will have the opportunity to migrate your existing 2 tier, Client or Project and Task List to new 3 tier (Client and Project and Task List). This is not optional!

When you first run version 9, the program will check to see if an older version exists on your PC (and/or network), if it finds one it will insist that you migrate the Client, Project and Task List to the new 3 tier format.

You must be an Administrator (if you have defined one) to run this Migration Wizard, and the program will require you to log in as such. Running the Migration wizard will take the Client, Project and Task List found in the existing List and allow you to define whether the top level names (Client or Project) are actually a Client Name or a Project Name.

If the original name found in the CPT List is a Client Name, then you can then insert Project Names under this client name.

If the original name found in the CPT List is a Project Name, then you can then insert a Client (owner) and assign that Project Name to the Client.

You may also define Projects as Common Projects or Unlinked Projects. If you run internal Projects, then we suggest you input your company as a Client Name, this will allow you to group internal projects under this Client Name.

Migrating '2 Tier' Timesheets from Older Versions (8.x) to Version 9.x ('3 Tier').

If you are a user of a Timesheet Xpress version lower than version 9, you will have the opportunity to migrate your existing 2 tier, (Client or Project and Task) timesheets to new 3 tier (Client and Project and Task). This is optional.

Running the Migration wizard will take the timesheet entries found within your present timesheets and allow you to define whether the top level (Client or Project) was actually a Client Name or a Project Name.

If the original name used on the timesheets was a Client Name, then you can then insert the correct Project Name between the Client and Task entered on all relevant timesheets.

If the original name used on the timesheets was a Project Name, then you can then insert the correct Client Name above the Project and Task entered on all relevant timesheets.

The program ensures that the Client, Project and Task List is first migrated, thus when you come to migrate the timesheets, the program will try to match as much as possible to the timesheets, minimising your inputs. Nonetheless you should expect to have to manually map some entries.

For more information or assistance please visit www.TimesheetXpress.com