

Migraine-free Guide to Migration

At Lgo, we want to help you make the switch from Daylite 3 to Daylite 5 as stress-free as possible. That's why we have prepared this handy 12-step guide to help you decide if you're ready to switch and to prepare yourselves for the change.

Migration may look like a daunting process, but don't worry as we're on hand to help. For ease, we've grouped these steps into three phases, to help divide up what needs to be done.

Phase 1: Plan

This first phase is designed for you to plan the switch to Daylite 5.

Step 1 - Look

Have a look at the new software and whet your appetite. Don't install anything yet or transfer any data, just see if Daylite 5 is right for you.

Step 2 - Check

Will it work? Don't look at Daylite here, but look at your other systems. Will your server run Daylite server? Will your computers or laptops run it? Are you on Mac OS X Lion? There's no point investing in a software that won't run!

Step 3 - What you currently do

In Annex A at the end of this document, we have produced a handy 'migration requirements' form for you to document your current system. Fill in the first column as detailed as possible, and ask your colleagues for their requirements. In the second column rate how important this is to your business.

Phase 2: Test

If you've moved on to the second phase, it probably means that you're still interested in Daylite 5. You like what you see and either your system will run it or you're going to invest in upgrades to make it work.

We will now trial Daylite 5 to make sure it will work for your business by testing that it does what you need it to.

Step 4 - Try it out

Update a test system and try out Daylite 5 using real data.

N.B. Don't update or input any new data to this database as it will probably be deleted later.

Step 5 - Test

Using the migration requirements chart, review each function in column 1 by testing it out and putting your results in column three. If you find Daylite 5 doesn't have the feature, or it works in a different way, use column four to catalogue the work-around or limitation.

Step 6 - Review

You should now review all the data you have collected so far, including the technical requirements for Daylite 5 and if your system will need upgrading. We think this is best carried out as an organisation-wide review, with everyone's opinion taken into consideration before a decision is reached.

Step 7 - Decide

It's now 'make your mind up' time. You should have enough information about Daylite 5 and your requirements to make an informed decision. Don't be afraid to say no - in the coming months any system bugs should be fixed and integration will be widened, so it may be a case that now may not be the right time. If you decide you do want to go ahead with an upgrade, then you should now assess and decide upon your training needs.

Phase 3: Do

You've now decided to migrate to Daylite 5. You know its strengths and limitations, what features it may not have now but you can work around or wait for. You're ready to implement the new system.

Step 8 - Updates

Any hardware/software updates you identified in Step 2 should be done now, such as installing a new server or updating to OS X Lion. When the system is ready...

Step 9 - Daylite 5

Upgrade to the Daylite 5 software. Check it works on all computers and they are syncing. Test your reports, scripts and forms are working. If you get any problems at this stage, let us know and we can help.

Step 10 - Migrate data

Convert your database to Daylite 5 and migrate it into Daylite.

Step 11 - Training

There are a lot of new features and ways to do things in Daylite 5. To save time in learning how the new system works, we can train you and your staff, bringing them up to speed with what's new and how things work. This will save you valuable time (and money).

Step 12 - Review

We're done! Daylite has been migrated and your staff are trained and working on the new system. You should now review this whole process and see if things could be improved for any future system changes.

