



Procare v10 – Data Conversion

To ensure a successful conversion please read this document carefully.

For more information: See Frequently Asked Questions at procaresupport.com/convert.

Important! Convert Only Once

The conversion process adds to any data that is already in v10. If you convert more than once (for the same location) you'll end up with duplicate copies of each family and child as well as duplicate records of their attendance, accounting information, etc.

Conversion Overview

1. Prepare Your 9.1 Data so it is ready for conversion (see below).
2. Download and run the EXPORT utility from within Procure 9.1 to create a conversion file (see page 4).
3. Run the built-in IMPORT utility to import data from the conversion file to Procure v10. (see page 5).
4. Review the Data in v10 making changes or additions as needed (see page 9).

Check Completed Tasks

Hint: Use the checkbox ☐ to keep track of completed tasks ☒.

Prepare 9.1 Data

Before You Begin

Make a Backup

- ☐ It's always a good idea to back up your 9.1 data before removing anything or making any significant changes.

Check Your Version

- ☐ You must have version 9.1.428 or higher.
- a) To check your version, click the Procure Logo (with the 3 penguins) at the main screen where you first sign in. A list of each module and version number will be displayed.
 - b) If you need to update (the version listed is below 9.1.428) click the Operations menu (top left) at the main screen of Procure and select Online Procure Update.

Remove Old Data - Especially if you have Mini-Procure!

- ☐ Anything you do not want to convert must be deleted from version 9.1 prior to conversion.

Old Families & Employees

If you have families, employees, etc. from past years (that are no longer needed) you'll want to delete them prior to conversion.

Mini-Procure

Removing old information is especially important if you have a "Mini" version of Procure as you are limited to 60 families. Every family in version 9 that has both a "Sponsor" and "Co-Sponsor" paying fees (indicated by transactions on the Co-Sponsor Ledger Card) will convert as two accounts in v10. This means you could quickly reach, or even exceed the limit of 60. Search for article KB0926 at ProcureSupport.com.

Edit People Names

- ☐ Parent names (sponsor / co-sponsor in 9.1) must be entered as follows in order to convert in a predictable manner.

2 Parents / Same Last Name

If two parents have the same last name and are entered together as the “sponsor” their first names must be separated by an ampersand “&”, the word “and”, a front slash “/” or backslash “\”. In v10 they will be treated as two people on the same family account.

Valid Name Examples:

Jane & John Smith, Jane and John Smith, Jane/John Smith, Jane\John Smith.

2 Parents / Different Last Names

If two parents have different last names they must be entered separately, one as the “sponsor” and the other as the “co-sponsor”. Assuming the co-sponsor *did not* pay separately (no entries on the co-sponsor ledger card) they will be treated in v10 as two people on the same family account.

Divorced or Separated Parents

Divorced parents should be entered separately, one as the “sponsor” and the other as the “co-sponsor”. Assuming they *did* pay separately (there are entries on the co-sponsor ledger card) then in v10 they will be treated as two separate family accounts. Each parent will be the Primary Payer on their own account.

Edit Email Addresses

- ☐ The Family Information screen in 9.1 allows for multiple email addresses separated by a comma or semi-colon. The first and second email addresses will convert as described below. Additional addresses (beyond two) will not convert.

1 Email Address

If there is only one email address it will be assigned to the first person listed as the “sponsor”. If Jane & John Smith are both listed as sponsor the email address will go to Jane.

2 Email Addresses

If there are two email addresses the 1st will go to the first listed sponsor and the 2nd to the second sponsor. If Jane & John Smith are both listed as sponsor the 1st address will go to Jane and the 2nd to John. If there is only one person listed as the sponsor (and there is no co-sponsor) the 1st address will go to that person and the 2nd address will be ignored. If there is one sponsor and one co-sponsor the 1st address will go to the sponsor and the 2nd to the co-sponsor.

Edit Phone Numbers

- ☐ Phone numbers must be entered as follows in order to convert in a predictable manner.

Home & Work Phone

Phone numbers in the “Home Phone” and “Work Phone” fields will convert as long as each phone number is on a separate line. Tap enter to begin each line with a new phone number.

Work Location

The “Work Location” field does not convert. If you have phone numbers here you’ll need to move them to the “Home Phone” or “Work Phone” fields.

Area Code, Separators

An area code is not required. You may use parentheses, dashes, dots or spaces to separate the numbers, or use no separator at all.

Valid Phone Number Examples (each on a separate line):

(541) 123-4567 home

890-3217 cell

503.321.7654 ext # 123 work

799 3313 pager

Child Enroll & Withdraw Dates

☐ The enrollment status of children in v10 influences many things such as whether a family is billed and which children show up on reports, etc. Therefore, it is important to be sure each child enrolled in 9.1 has an appropriate enrollment date and any children who have left the center have a withdraw date. If a family is already set to "Deactive" you'll still want to confirm that children in the family also have withdraw dates.

To quickly see which children are missing dates go to General Reports > Family Data > Letter K – Special Reports > Child's Key Date Summary. Be sure to select all Customer Status levels (Active, Deactive and Potential) to include on the report. You may also wish to set the Primary Sort to "Customer Status".

Family Accounting

The following things must be done.

Charge & Credit Descriptions

☐ All charge, credit and payment descriptions must have valid GL Numbers. Go to Functions > Program Configuration > Family Accounting Setup. Review each set of descriptions (Tuition Charges, Other Charges, etc.) making sure each item has a GL Number and General Ledger Description.

Accounting Maintenance

☐ Run Accounting Maintenance to clean up any possible irregularities on family ledger cards. Wait to do this until just before you are ready to export your 9.1 data. Go to Functions > General File Management > Accounting Maintenance > Make sure the "Purge Date" says 12/31/1980 > Click Start.

Deposit Reports

☐ The Current Deposit Report must be closed. Wait to do this until just before you are ready to export your 9.1 data. Go to General Reports > Accounting > Letter – K "Deposit Report" > click Close.

Transaction Summary

☐ The Current Transaction Report must also be closed. Wait to do this until just before you are ready to export your 9.1 data. Go to General Reports > Accounting > Letter – L "Transaction Summary" > click Close.

Tuition Express

"Sync" Tuition Express Information

☐ You must "sync" family Tuition Express information. Wait to do this until just before you are ready to export your 9.1 data. Go to Functions > Process Tuition Express > click Step 1. When this process is complete you'll see "Sync Successful", "End Sync Check", "Session Closed". Then click Exit.

Employee Data

Work Department

☐ Each employee must have at least one actual Work Department that is not called "All Departments". The first Work Department assigned to the employee will become their Primary Work Area in v10. Other departments are not converted.

Employee Position

☐ All Employee Positions must have valid GL Number assignments in Program Configuration. Go to Functions > Program Configuration > Employee Positions. Review each position (Teacher, Assistant Teacher, etc.) making sure each item has a GL Number and General Ledger Description.

Export Data from 9.1

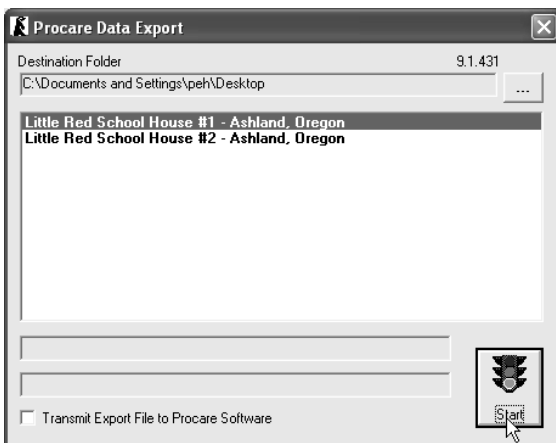
1. Make sure you are connected to the internet.
2. Go to the main screen of ProCare 9.1 (with the 3 penguins logo). You must be signed out of ProCare to download the utility. Click the Sign Out button if needed.
3. Click the Help menu (top of screen) and select Download ProCare Support File.



4. Enter the Password **CV10** and click Start.

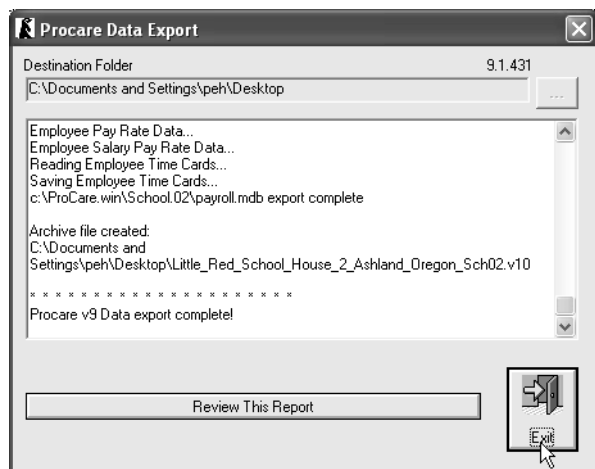


5. When the Procure Data Export screen appears:
 - a) Select a Destination Folder. This is where the export file will be created. You can save it to your desktop, a specific folder or a USB drive, etc. If v10 is installed on a different computer a USB drive would be a good choice so you can take the export file to the other computer.
 - b) If you have more than one location select the location you wish to export. Hint: you'll create a separate export file for each location.
 - c) Click Start.



6. You'll get a summary screen that says "Procare v9 Data export complete!". Just click Exit.

The export file will be in your "Destination Folder" and named for your location like:
Little_Red_School_House_1_Medford_Oregon_Sch01.v10



Export Failed?

If the message "Procare v9 export failed!" appears, a list of items to be corrected will be shown above the message. Correct each item on the list then download and run the export utility again. Hint: To print the list click "Review This Report" - which opens the list in Notepad. Then choose Print from the File menu (upper left in Notepad).

Import Data to v10

Before You Begin

When to Import

If you have multiple locations using Procare you'll need to choose a time to import when other people will not be trying to access Procare. During the import process a large transaction is being recorded to the database and other people trying to use Procare at that time will experience unexpected results.

Important! Make a Backup in v10

☐ Before you import be sure to backup your v10 data. This is a precaution so you can easily undo the conversion (if needed) by restoring the backup.

Note: If you are using the Procare Data Hosting service all backups are managed by Procare. If you need to revert back to a blank database just contact us and we'll take care of it.

1. From the Procare Home screen click Utilities > Database Backup / Restore.
2. The Backup Database tab (at the top) should already be selected. Just click the Backup button.
3. When the backup is complete you'll be asked if you would like to copy the new backup to another location like a USB flash drive. This is generally a good idea. Answer "Yes" and browse to the location of your choice.
4. Click Exit.

Remove Practice Data

☐ If you've entered practice data into v10 you'll want to remove it prior to importing your conversion file. To do so you could restore a backup made before any practice data was entered or uninstall and reinstall v10. If you are using the Procare Data Hosting service see note above.

Important! If you have multiple locations restoring or uninstalling replaces / removes data from all locations at once.

Multiple Locations?

☐ If you have multiple locations, set up the location names in v10 prior to importing. During the import process you'll specify to which location the data belongs. Search for article KB0027 at ProcureSupport.com.

License Configuration

☐ In v10 select which Procure modules will be used for each of your locations – even if you have just one. From the Procure Home screen go to Configuration > License. Search for article KB0023 at ProcureSupport.com.

Payroll Tax Formulas

☐ If you are converting Payroll you must Download Tax Formulas in v10 prior to importing. From the Procure Home screen go to Configuration > System > Accounting Management > Payroll > dbl-click Payroll Formulas > click the Download & Update button.

Tuition Express?

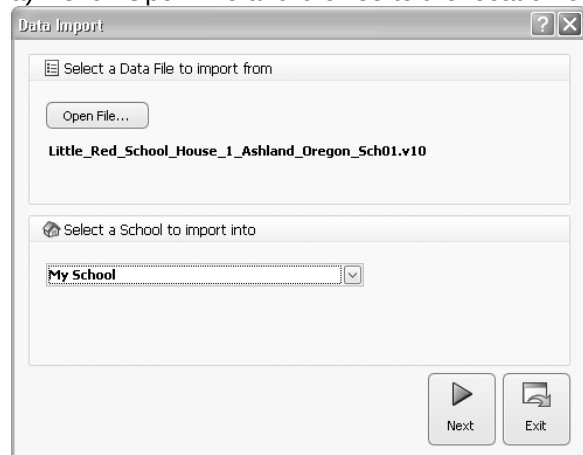
☐ If you are converting Tuition Express you must set up Tuition Express in v10 prior to importing. Search for article KB0225 at ProcureSupport.com.

☐ Tuition Express users are required to have a password protected screen saver set to lock the computer after 15 minutes (or less) of inactivity. You may do this ahead of time or be prompted to do so during the import process. Search for article KB0234 at ProcureSupport.com.

☐ Tuition Express users must download and acknowledge acceptance of the PA-DSS Implementation Guide. You may do this ahead of time or be prompted to do so during the import process. Go to the download page at http://www.tuitionexpress.com/implementation_guide.aspx. Enter your Tuition Express Account Number then download and accept the guide.

Ready to Import

1. Download the latest update for v10. Click the Utilities menu (top left) of the Procure home screen and choose "Check for online update".
2. Log into Procure as a member of the System Supervisor user group. Then from the Procure Home screen click Supervisor Utilities > Data Import / Export.
3. When the Procure Data Import screen appears:
 - a) Click Open File and browse to the location of the export file you previously created.

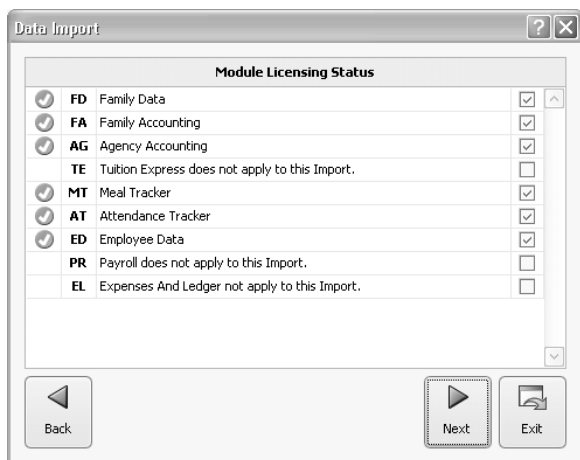


- b) Select a school location to which the data will be imported.
 - c) Click Next.

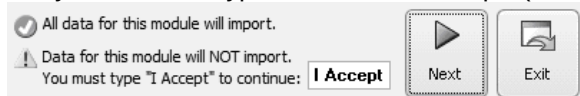
4. At the Module Licensing Status screen:

- a) If all modules have a green check mark AND you want to import everything that is checked click Next.

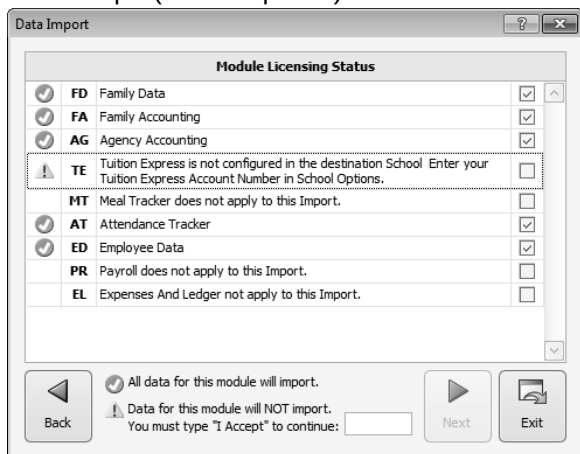
Note: Payroll cannot be imported separately from Employee Data. If you have previously imported Employee Data DO NOT import it again.



- b) If you do NOT want to import something uncheck the box for that module. A yellow warning will appear and you'll need to type the words "I Accept" (without quotes) then click Next.



- c) A yellow warning will also appear if you were licensed for more modules in version 9.1 than in v10. Data for unlicensed modules will not be imported. If you understand this and wish to continue type the words "I Accept" (without quotes) then click Next.

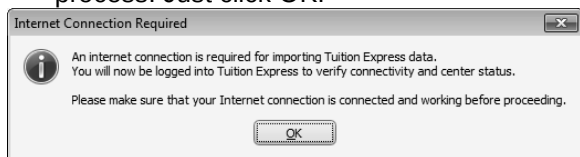


Tuition Express Note!

If the yellow warning is on Tuition Express it means you have not set up your Tuition Express Account Number in v10. In that case, exit the import screen and search for article KB0225 at ProcureSupport.com. Once Tuition Express is set up in v10 you may start the import process again.

5. If you have Tuition Express you may get any or all of the following prompts (otherwise skip this step):

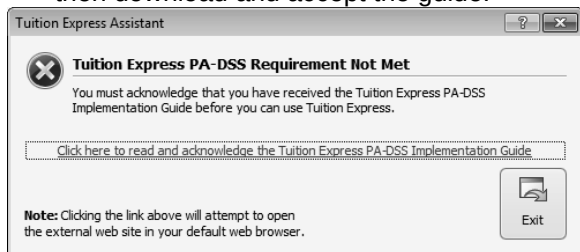
- a) Internet Connection Required. This prompt is a reminder to be sure you are online before continuing the process. Just click OK.



- b) Screensaver settings do not meet PA-DSS requirements. You must have a password protected screen saver set to lock the computer after 15 minutes (or less) of inactivity. Click the link to go to the screen saver settings for this computer.



- c) PA-DSS Implementation Guide. You must download and acknowledge acceptance of the PA-DSS Implementation Guide. Click the link to go to the download page. Enter your Tuition Express Account Number then download and accept the guide.



6. If you have the Meal Tracker module you *may* see a Meal Abbreviation Mapping screen (otherwise skip this step):

- a) Select the v10 abbreviation that goes with each version v9 abbreviation, for example B for breakfast in version 9.1 may go to BR for breakfast in v10. If you have additional v9 abbreviations (like D for dinner), but you do not have a corresponding one in v10, then leave it blank. Click Next.

The screenshot shows a window titled "Data Import - Meal Mapping". Inside is a table titled "Meal Abbreviation Mapping". The table has two columns: "V9 Abbreviations" and "V10 Abbreviations". The rows are as follows:

V9 Abbreviations	V10 Abbreviations
B - Breakfast	BR - Breakfast
S1 - Snack	BR - Breakfast
L - Lunch/Dinner	L - Lunch
S2 - Snack	D - Dinner
D - Lunch/Dinner	D - Dinner
S3 - Snack	

At the bottom of the window are "Back" and "Next" buttons.

7. If you have the Agency Accounting module you *may* see an Agency Mapping screen (otherwise skip this step):

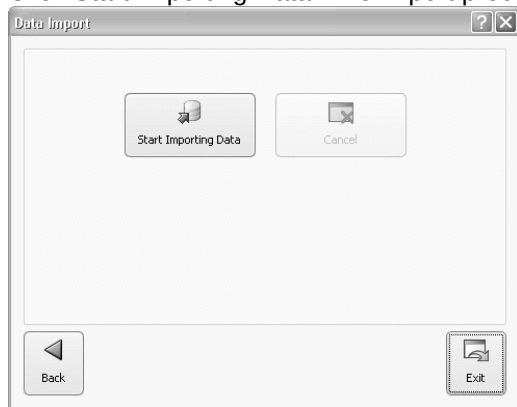
- a) Select the v10 agency name that goes with each v9 agency name. If you do not have an appropriate agency in v10 then select "Create New Agency". Click Next.

The screenshot shows a window titled "Data Import - Agency Mapping". Inside is a table titled "Agency Mapping". The table has two columns: "V9 Agency Name" and "V10 Agency Name". The rows are as follows:

V9 Agency Name	V10 Agency Name
Department of Human Resources	Create New Agency
Jackson County Outreach	Create New Agency

Below the table, there is a text box containing contact information: "John J. Brown, 1234 Main Street, Anytown, OR 97500, (800)-334-3884". To the right of this text box is a "Create New Agency" button. At the bottom of the window are "Back" and "Next" buttons.

8. Click Start Importing Data. The import process may take a while. When the import is complete click Exit.



9. You may now log in with the default conversion username and password of PCV9. Procure Users may also log in using their initials (in all CAPS) from 9.1 as both the username and password. In either case you'll be immediately prompted to change the password.

Review & Setup Data After Conversion

You'll want to set up any items that did not convert and review the data that did convert.

Change User Groups

☐ People who use Procure (your Procure Users) all convert as members of the "System Supervisor" user group. This is the highest level group and has unrestricted access to the system. You'll want to assign everyone, except the owner / administrator, to a lower level group with at least some limitations. From the Procure Home screen go to Configuration > System > Locations & Users > Procure Users. Search for articles # KB0032 and KB0034 at procuresupport.com.

Sample Families

☐ If you entered sample families in v10 for practice, and did not remove them ahead of time, those families will remain after conversion. You could remove all your data by uninstalling and reinstalling then import your conversion file again (not recommended if you have multiple locations). Another option would be to keep the practice families and void any practice ledger card entries. Then mark those accounts as hidden, or re-use the accounts for new families by typing over the practice information with real information.

More than 4 Children

☐ If you have any families with more than four children you'll want to set each family up as a single account in v10. Search for article # KB0908 at procuresupport.com.

Billing Box

☐ Billing Box information does not convert. You'll need to set up the Billing Box for each child. Print the following report from 9.1 to help you out. General Reports > Accounting > Letter J – Family Billing Box > Contract Cycle Detail (or Billing Methods Detail). If you used both Contract Cycles and Billing Methods you'll need both reports.

Child Schedules

☐ Although each child's "current" schedule does convert you'll want to be sure the Start and End dates are appropriate. Just go to the Schedule Button of an individual child to get started. You may also want to set up Schedule Templates in the System Configuration.

Emergency Contacts, Pickup People

☐ Emergency Contacts, Authorized Pickups, etc. do not convert. They should be entered on the Information & Relationships screen of each child. Print the following report from 9.1. General Reports > Family Data > Letter D – Information Sheets.

Groups, Programs, Bus Runs

☐ Customer Groups from 9.1 will become Account Tracking items in v10. Child Programs and Bus Runs from 9.1 will become Child Tracking items in v10.

Immunizations

☐ Be sure to review all immunization settings after the conversion. Child immunization records do convert along with the name of the immunization, however, the schedule of when immunizations are due does not convert. From the v10 Home screen go to Configuration > System > Data Management > Immunizations & Requirements > Global Child Immunizations & Requirements.

Note: Some immunization names you convert may have similar, but not identical, names as the default immunizations in v10. For example 9.1 limited you to 8 characters so a longer name like "Varicella" may have been abbreviated to something like "Varicel". After conversion you'll have two immunizations with similar names. You'll be able to run the "Configuration Merge" utility in v10 to clean up this type of situation by merging the two together.

Remove Duplicate Employees

☐ The people who use Procure (known as Procure Users) are typically employees too. They might also have an account in Family Data if you offer employee child care. Each is converted as a new person in v10, so it's possible to end up with 2 or 3 occurrences of the same employee (as a Procure User, an employee, and a payer on a family account). You'll want to merge the person records for the employee so the system recognizes them as one person. Go to Utilities > Remove Duplicate People.

Duplicate Descriptions

☐ If you set up items in v10 prior to conversion, like classroom names, charge descriptions, etc. you may end up with multiple items that have similar names. For example if you had "Infants" as a classroom in 9.1 and set up "Infant" (without an "s") in v10, then converted, you'd end up with two classrooms that have similar names. You'll be able to run the "Configuration Merge" utility in v10 to clean up this type of situation by merging the two together.

Configure Payroll Withholdings

☐ If you are using the Payroll module you will have already downloaded tax formulas (page 6 above). Next you'll set up withholding formulas for general items like employee child care, health insurance, retirement plans, etc. You can download formulas for common types of withholdings such as these. Another option is to create your own withholding formulas. Search ProcureSupport.com for articles KB0319 (download formulas) and KB0302 (create formulas).

Assign Payroll Withholdings, etc.

☐ Once all withholding formulas are configured you'll assign the appropriate withholdings, variables and reimbursements to each employee. Search ProcureSupport.com for articles KB0310 (withholdings & variables) and KB0312 (reimbursements).

Enter Beginning Balances

☐ Beginning Balances for the Expenses & Ledger module must be entered. Search for article KB0927 at ProcureSupport.com.

-- end --