

INTRODUCTION

This document will provide an overview of the basic steps required to upgrade from FLEETMATE Standard Edition, to FLEETMATE Enterprise Edition.

There are three (3) primary steps involved in this process:

1. Prepare your existing FLEETMATE Standard Edition Data
2. Install FLEETMATE Enterprise
 - a. Requires Microsoft[®] SQL Server[®] Management Studio 2005 or later
3. Migrate your Standard Edition Data to your new Enterprise Edition database

Each specific data migration process is unique, and may vary depending upon how your data was originally entered. In addition, there can be data issues that will need to be addressed in order to successfully migrate your existing Standard Edition data. If you encounter any difficulties, please contact us for assistance.

It is suggested that you consult with your IT staff as you proceed through this process. At the very least, you will need assistance from your SQL Server[®] Database Administrator in order to create your new FLEETMATE Enterprise Edition database.

Each of the three steps above will be covered in the pages that follow.

1 Prepare Your Existing FLEETMATE Standard Edition Data

1. Close FLEETMATE Standard Edition on all PCs.
2. Make an archival copy of your FLEETMATE Standard Edition database file.
3. Repeat the FLEETMATE Standard Edition download/installation process from the FLEETMATE Website, on your PC to ensure that you have the latest release of the software.
4. Start FLEETMATE Standard Edition on your PC and perform a database repair
 - a. File | Database | Utilities | Repair...
 - b. Click Begin
5. Query your FLEETMATE Standard Edition database for duplicate work order numbers
 - a. File | Database | Issue SQL Statement...
 - b. Enter the following SQL statement into the center pane of the window

```
SELECT Maintenance.NO_ORDER, Maintenance.TX_VIN, Vehicle.TX_VEHNUMBER FROM
Vehicle RIGHT JOIN Maintenance ON Vehicle.TX_VIN = Maintenance.TX_VIN WHERE
(((Maintenance.NO_ORDER) In (SELECT [NO_ORDER] FROM [Maintenance] As Tmp GROUP
BY [NO_ORDER] HAVING Count(*)>1 ))) ORDER BY Maintenance.NO_ORDER;
```

- c. Click the Execute! Button.
 - i. The query MUST report no rows returned.
 - ii. If any duplicate work order numbers are found, edit the work order(s) using the FLEETMATE user-interface, to make each work order number unique.
 - d. Repeat step #5 until no duplicate work order numbers are found.
6. Close FLEETMATE Standard Edition.

2 Install FLEETMATE Enterprise Edition

1. Verify that you have Microsoft[®] SQL Server[®] Management Studio (SSMS) 2005 (or later) installed on your PC.
2. Go to <http://www.fleetmate.com> and select the Download page.
 - a. Click the Enterprise Edition download link and choose Run...
3. Once the installer opens, use the Next -> button to select all default settings, and click Finish once the process is complete.
4. Using Windows Explorer, navigate to:
 - a. C:\Program Files (x86)\FLEETMATE_Enterprise\Database\Scripts
 - b. Open the file named "Create_FLEETMATE.sql" in a text editor, such as Notepad.
 - c. If necessary, edit the pathspec for the MDF and LDF files to match the valid path for your SQL Server installation.
 - d. The default database name on SQL Server will be FLEETMATE.
 - i. If necessary, edit all occurrences of "FLEETMATE" to the value that you wish to use for your database name.
 - e. Save the "Create_FLEETMATE.sql" file with your changes and close your text editor.
5. Create your FLEETMATE database on SQL Server
 - a. Double-click on "Create_FLEETMATE.sql" to open it in SSMS
 - b. Click Execute to create your SQL Server database.
 - i. This process MUST be error free.
 - c. Using SSMS, create your login(s) for your domain users, enable the login, and set the User Mapping for each login to:
 - i. db_datareader
 - ii. db_datawriter
6. Start FLEETMATE Enterprise using the shortcut on your desktop
 - a. When opening your FLEETMATE database, ALWAYS set your "Provider" to:
Microsoft OLE DB Provider for SQL Server
 - b. Select your Server/Instance
 - c. ALWAYS use **Integrated Security**
 - d. Select your database name and then click OK.
 - e. Your database is currently empty, which is normal. This step confirms a successful connection to your database.
7. Close FLEETMATE Enterprise Edition.

3 Migrate your Existing Data to FLEETMATE Enterprise Edition

Please refer to page 5 in the document entitled “**Enterprise – Administrator**” for a more detailed explanation of using the Data Migration Utility. This document can be found on the **Support** page of the FLEETMATE Website.

1. Open Windows Explorer and navigate to C:\Program Files (x86)\FLEETMATE_Enterprise
2. Double-click on the FMEEMIG.exe file to start the Migration Utility
 - a. Open your Standard Edition *source* database
 - b. Open your Enterprise Edition *target* database.
 - c. Click Next
3. Select Initial Standard Edition Data Load as your Migration Mode
 - a. Click Next
4. Unless otherwise instructed by technical support personnel, ensure that all tables are selected.
5. Click Begin.
 - a. The migration process **MUST** be error free. If any difficulties occur, please contact us for assistance locating invalid data in your Standard Edition source database.
6. Use the <-Back button to return to the opening screen and click Exit to close the software.