

**DBA Software**

*Common Sense Manufacturing  
for Small Business*

**DBA Manufacturing**

**NEXT-GENERATION**

# ***Classic to Next-Gen Implementation Guide***

**Tasks & Responsibilities • Target Dates • Checklists**

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## 1. Introduction

### **Next-Gen is a completely different product**

*DBA Manufacturing Next-Generation* (referred to as *Next-Gen* in the rest of this guide) is a completely different product than *DBA Classic*.

#### **Different Origin**

*Next-Gen* originated from a software package named *Ezjobz SME*, which we acquired from another company in 2003. It was re-branded with the DBA name in late 2004 when our programming team took over product development.

#### **Different Technology**

*Next-Gen's* technology is completely different than *Classic's* technology. It is written in a different programming language (Delphi vs. TAS) and uses a different database (Firebird SQL vs. Pervasive).

#### **Different Multi-User Control**

Both systems limit the number of users who can access the system at any given time to your licensed user count. *Next-Gen* has an additional restriction whereby the number of user logon ID's that can be designated as "active" is limited to your licensed user count.

NOTE: In some cases this may require purchase of additional users when converting to the new system.

#### **Different Feature Sets**

The two products serve the same target market – manufacturing businesses – and have many of the same modules, but the similarities end there. Within the modules the features and functions are quite different.

#### **Different Support Model**

Unlike the old fee-for-service support model used with *Classic*, support for *Next-Gen* is Internet-based and is provided via a flat fee Support Subscription.

### **The decision to convert is yours alone**

We are neutral in regards to which system you use. Only you can make the decision to change systems. You must look at *Next-Gen* objectively like you would any other new product and decide if it's in your best interest to make the change.

### **Follow the Implementation Planner**

If you decide to convert to *Next-Gen*, you must go through the exact same implementation process that any other company would undergo coming from a non-DBA system. This means that you must follow all the steps in the

*Implementation Planner* and go through the four phases of implementation: *Installation*, *Setup*, *Rehearsal*, and *Startup Day*.

### **What happens during the Setup phase?**

During the *Setup* phase, you have the option of using the DBATRAN utility to export master table data from *Classic* into Excel spreadsheets. Once your master tables are in spreadsheet form, they can be edited to conform to the specific requirements of the corresponding *Next-Gen* tables. After the master tables are edited, they can be imported into *Next-Gen*.

### **Use the standard chart of accounts**

*Next-Gen* is supplied with a standard chart of accounts that is optimized for manufacturing and for the *Next-Gen* system. Instead of using your existing chart of accounts, we provide a means whereby you cross-reference your old accounts with the standard accounts and add new accounts for any exceptions.

### **Do not skip the Rehearsal phase**

After the *Setup* phase is completed, it is imperative that all your users go through the *Rehearsal* phase in which you make a trial run (using our *Training Company* installation) on your own data. This is the only way to make sure that all the processes, forms, workarounds, etc. are in place to avoid any disruption in your ability to serve your customers.

NOTE: Be sure and verify during the trial run that all the forms, labels, and checks you need are available and functional in *Next-Gen*. Do not assume that forms and labels work the same as they do in *Classic*.

### **Startup Day**

After the *Rehearsal* phase is completed, the final step is to prepare for a *Startup Day* when you stop using *Classic* and run entirely in *Next-Gen*. Just prior to *Startup Day* you will enter all your open sales order, jobs, PO's, customer invoices, supplier invoices, and beginning inventory and GL balances.

## **Do not convert without a support subscription**

Any company that converts to an all-new manufacturing system cannot realistically do so without any training and support.

Our flat-fee support subscription is resource-based and provides value to all your users, whether your company uses support tickets heavily or not at all. The online video training courses provide valuable tips and suggestions and consulting advice that users will not get from written documentation. During the conversion process you will most assuredly have questions and will benefit from our help.

### Support: What to expect and not to expect

The Internet-based support model we use with *Next-Gen* is quite different than the fee-for service model we offered in the *Classic* era. It is more affordable, more responsive, and offers many more self-help resources. Here are some things to keep in mind as you get involved with our support program.

#### **Expect support to be an ongoing cost over the life of the system**

You should not attempt to convert to *Next-Gen* on your own and should budget for a support subscription. In fact, we advise customers to maintain a support subscription over the life of the product. To encourage this, after your initial 6-month subscription expires, you receive a special renewal rate that is discounted by \$200 that stays in effect for as long as you continue your subscription without interruption.

#### **Do not expect “per incident” or free support**

The purpose of our support subscription model is to eliminate fee-for-service billing in favor of a low-cost flat fee that is affordable for all. Therefore, we do not offer any type of “per incident” alternative. We also do not provide any free or “back channel” support for system installation or updates.

#### **Do not expect to pick up the phone**

Without exception, all support is initiated through a support ticket. The ticket queue is monitored throughout business hours and channels all support requests through a central system. We do not have a support phone number. Please do not call our sales office for support-related issues.

#### **Do not expect our support staff to be familiar with Classic**

Our support staff knows *Next-Gen* well, but not one person on the staff comes from the *Classic* era. So when you submit tickets, please don't compare and contrast how *Classic* did something with the way *Next-Gen* does it because it will have no meaning to our support people.

## Data Transfer: What not to expect

### Do not expect complete data transfer

The DBATRAN utility only exports master tables. It does not export open sales orders, work orders, purchase orders, customer invoices, supplier invoices, or transactional history. For some time after the conversion you will want to retain access to *Classic* in order to reference historical information.

### Do not expect guaranteed data export

We cannot guarantee that the DBATRAN utility will work for all *Classic* systems. DBATRAN only works with certain version of Pervasive and may not work on systems that have been altered with custom programming or add-on products such as Evo-ERP. DBATRAN does not work on some systems for unknown reasons.

So try DBATRAN and hopefully it will work for your system. If you cannot make it work, you can export data on your own using the Pervasive Control Center.

## Hardware & Network Considerations

A final factor to consider before making a conversion to *Next-Gen* is the status of your hardware and network. *Classic* uses older technology that runs on older machines. *Next-Gen*, like most newer software programs, requires more memory, more processing power, and a faster network. You should review our system requirements, which are listed in our *Installation Guide*, and upgrade your equipment and network if required.

## 2. Classic Features Not Available in Next-Gen

This chapter provides a listing of some *Classic* features that do not have an equivalent capability in *Next-Gen*.

NOTE: This is a partial list and should not substitute for making a thorough trial run to make sure *Next-Gen* will suit your requirements.

### **Contact Manager – limited capabilities**

Activity notes provide a contact manager type capability in terms of scheduling follow up events, but it is not a full-featured contact manager like the *Contact Manager* module in *Classic*.

### **Data Collection**

There is no labor data collection capability at this time, although a new 'Job Clock' is planned. The *Job Tracking & Labor* screen, however, provides real time job tracking based on routing sequence completions. It also enables you to enter labor hours or you can "backflush" labor based on item completions and estimated cycle times.

### **Estimating**

There is no estimating module at this time. You can enter a sales quote that can be converted into a sales order, but the sales quote itself does not perform any computations. For now you can use the *Cost Rollup* screen to calculate estimated BOM costs.

### **Features & Options**

We have not yet completed the features and options capability. It will have similar functionality to the *Features & Options* module in *Classic*, but will likely require new data setup.

### **Forms – No text versions**

*Next-Gen* does not offer text-based formats for printed forms. Only graphical formats are supported.

### **Interest on Overdue Accounts**

There is no means to calculate and bill customers for interest on overdue invoice amounts.

### **Multi-Currency**

*Next-Gen* does not yet offer multi-currency processing.

### **Multiple Companies – requires separate installation and license**

In *Classic*, you could create an unlimited number of additional companies that were under the umbrella of a single license and multi-user controls. In *Next-Gen*, you are supplied with a main company and a sample company. Additional companies require separate installation and do not share user logons with other companies, nor is there any provision for multi-company GL consolidation. Additional companies are licensed separately – call for pricing.

### **Payroll**

*Next-Gen* does not include a Payroll module. The payroll function is completely independent from job labor, which means you can use any outside payroll software package or service. A *Payroll Import* program enables you to import summarized payroll information into the General Ledger.

### **Purchase Price Table – no quantity breaks (coming)**

The purchase price table offers a price and an expiration date, but does not yet offer quantity price breaks.

### **Recurring Sales Orders**

Recurring sales orders must be done manually by copying previous sales orders as needed.

### **RFQ – limited capability**

You can designate a PO as being a 'quote', which exempts it from MRP, but there is no RFQ conversion feature that updates pricing tables from RFQ's.

### **Scrap Codes & QC Codes**

A formal table of scrap and QC codes, with appropriate reports, has not yet been added to *Next-Gen*.

### **Sales Commissions – no calculations**

In *Next-Gen* you can track sales by sales rep and can get totals by item category and customer type, but no percentages are maintained and no calculations are made.

### **Sales Tax Payment – no auto transfer**

Sales tax detail is provided in reports, but there is no way to automatically transfer sales tax payable into AP entries for payment. AP entries must be made manually.

### **Swap Substitute Parts**

An automatic means for swapping in alternate items has not yet been developed. Swapping for now must be done manually using the where used inquiry.

### **Tool Table**

You currently do not have the ability to specify tools within routing sequences.

### **WIP Percent Completion Report**

There is no report that assesses the overall completion status of a job, normally used for percentage billing purposes.

## 3. Creating Data Transfer Spreadsheets

You can transfer major master tables from *Classic* to *Next-Gen*. This data transfer is accomplished by exporting master tables into Excel spreadsheets, then editing the spreadsheets as needed, then importing the data into *Next-Gen*.

In this chapter we show you how to use the DBATRAN data export utility to create a set of Excel spreadsheets that you will use for various tasks during the “setup” phase of implementation.

### **Why spreadsheets transfer instead of direct import?**

Master tables are exported into spreadsheets instead of being imported directly into *Next-Gen*. This is because most of the tables require some editing before they can be imported to make them compatible with the requirements of the corresponding tables in *Next-Gen*. Spreadsheets are optimized for editing large sets of data and are the ideal medium for data transfer purposes.

## **Classic System Requirements**

In order to run DBATRAN, your *Classic* system must meet these requirements.

- You must be on DBA Classic version 2001.1 or higher.
- Your database engine must be Pervasive 2000i or Pervasive V8.

NOTE: You can determine which version of Pervasive you have by launching DBA and noting the version listed on the Pervasive banner screen that is briefly displayed when the database engine starts up.

### **Incompatible Versions**

DBATRAN is not compatible with versions earlier than 2000i or Pervasive 9.5 and higher.

## **If you cannot get DBATRAN to run**

If you are on an incompatible version of Pervasive or you cannot get DBATRAN to run, we suggest you do a web search on “DBA Classic Support” to find independent third party consultants who continue to provide support services for *Classic*.

If a consultant has a working version of *Classic* that can run DBATRAN, he or she should be able to take your database files, run DBATRAN, and send you back the complete set of Excel spreadsheets

**WARNING: If you work with a consultant, insist on receiving the official spreadsheet set that is gets generated by DBATRAN. Avoid using any other data transfer process, especially one that bypasses the spreadsheet editing process and translates and imports your data tables directly into Next-**

**Gen. This will import “garbage” data into Next-Gen that harms the integrity of the system and your ability to use it successfully.**

## Installing DBATRAN

### 1. Download DBA2NG.EXE from our website

The first step is to download an installation file named DBA2NG.EXE. A link to this file is provided on the *DBA Classic FAQs* page on our website ([www.dbamanufacturing.com/classic/faq/](http://www.dbamanufacturing.com/classic/faq/)). Links to this web page can be found on the *Pricing* page and *Contact* page.

Download DBA2NG.EXE into a temporary folder on the same machine where your *Classic* data resides.

### 2. Run DBA2NG.EXE

Double click on DBA2NG.EXE, which extracts DBATRAN.EXE as well as several accompanying DLL files. Leave all these files in the temporary folder.

### 3. Prepare Classic for conversion

Do the following before you run DBATRAN.

- Have all other users exit Classic.
- Run Classic and change to the company from which you will be exporting data.
- Go to UT-A and run ODBDDF. This program creates a full set of DDF files that are needed for data export.

### 4. Run DBATRAN

Browse to your temporary folder and double click on DBATRAN.EXE, which launches the Pervasive database engine and then the main screen, which contains these settings:

#### 1. Select DBA Classic Location

Browse to the location of your main DBAMFG folder.

#### 2. Select DBA Classic Company

Use the lookup to select the *Classic* company from which you wish to export data.

#### 3. Set Output File Location

Browse to the folder where you want your export spreadsheets to be created.

#### 4. Connect to DBA Classic Data

Click the *Connect* button to connect to the Classic database.

### 3. Creating Data Transfer Spreadsheets

#### 5. Begin the Export

Click the *Export* button to begin the export.

#### **If you are on Pervasive 2000i and cannot get DBATRAN to run:**

If you are on Pervasive 2000i and you cannot get DBATRAN to run, you must apply two service pack updates, as follows:

- First, you must update to Pervasive 2000i SP4 (service pack 4). You can download SP4 from the *DBA Classic FAQs* page on our website.
- After you install SP4, you must install the Pervasive."Hot Fix" (HF\_SRDE.exe). This file is also found on the *DBA Classic FAQs* page on our website.

## Spreadsheet Listing

DBATRAN creates the following 12 Excel spreadsheets in the CSV file format.

ClassicCustomer.csv  
ClassicCustomerContacts.csv  
ClassicSupplier.csv  
ClassicSupplierContacts.csv  
ClassicInventory.csv  
ClassicInventoryExclusions.csv  
ClassicBasePrices.csv  
ClassicItemSources.csv  
ClassicBOMs.csv  
ClassicBOMExclusions.csv  
ClassicRoutings.csv  
ClassicRoutingExclusions.csv

## 4. Next-Gen Implementation

### Follow the Implementation Planner

To implement *Next-Gen*, follow the steps in the *Implementation Planner* in the exact sequence specified.

**Your implementation process is exactly the same as it would be for any company coming from any non-DBA system.**

#### **Do not attempt to import all your master tables at once**

Do not attempt to import all your master tables at once. Wait to import each table only when specified as a task in the *Implementation Planner*. Manual entry of supporting tables is required prior to importing each master table, and master table spreadsheets require editing before they can be imported. So take your time and don't rush the process.

#### **Do not skip the training videos**

Most implementation tasks are covered by video training courses in the online support center. Because *Next-Gen* is a completely different product, it is imperative that each user reviews the training courses pertaining to his or her functions in order to gain a fundamental understanding of the *Next-Gen* workflow.

#### **Use the Implementation Planner as an active workbook**

The *Implementation Planner* is more than a reference guide. It is to be used as an active workbook where you establish task responsibilities and record completion dates.

You can access the *Implementation Planner* from the *DBA Classic FAQs* or *Features* pages on our website, or you can access it from the Help menu within the *Next-Gen* system.

#### **If you are using outside help:**

If you are using an outside consultant to help you with implementation, make sure the consultant follows the steps in the *Implementation Planner*, which is a proven methodology that will help you get the most for your service dollar and gives you the highest probability of success.

### Phase 1 – Installation

Follow the steps listed in the *Installation* phase of the *Implementation Planner*. This phase covers physical installation, support accounts setup, and user setup.

### Phase 2 – Setup

In the *Setup* phase of the *Implementation Planner*, you will establish system settings and enter and import master tables.

## 4. Next-Gen Implementation

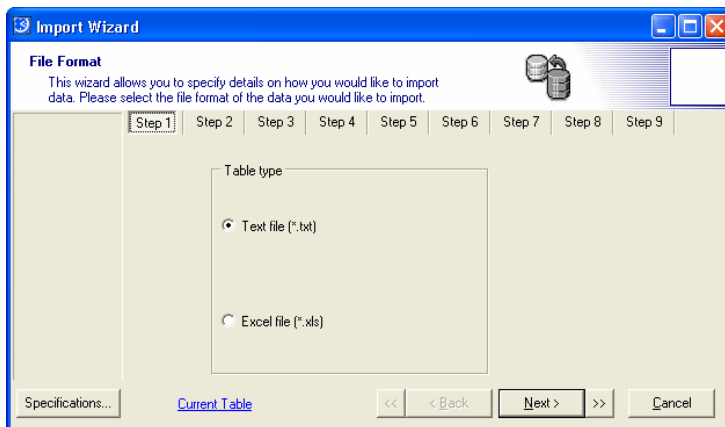
### Insert Classic import notes into your workbook

The following notes pertain to Classic data import and should be cut out and inserted into your *Implementation Planner* workbook.

### Data Import – File Selection

#### CSV File Format

The Excel spreadsheets that were generated by DBATRAN are in a CSV file format. Technically, a CSV file is a text file that can be viewed and edited in Excel. When you use the Import Wizard, you are presented with this screen:



You can select either option to navigate to your CSV file.

- If you select the 'Text file (\*.txt)' option, when you are presented with the file selection screen, change the *Files of type* setting from 'Text file (\*.txt)' to 'Comma-delimited file (\*.csv)'.
- If you select the 'Excel file (\*.xls)' option, when you are presented with the file selection screen, change the *Files of Type* setting from 'Excel spreadsheet (\*.xls)' to 'All files (\*.\*)'.

### Task 2-6-5: Item Sources

#### File: ClassicItemSources.csv

In *Classic*, there was no association between *Suppliers* and *Manufacturers*, whereas in *Next-Gen*, *Manufacturers* and *Mfgr Part Nos* are assigned to *Suppliers*.

This spreadsheet has separate lines for *Suppliers* and *Manufacturers*. You must blend this information into single lines by adding the *Manufacturer* and *Mfgr Part No* into each *Supplier* line and then deleting the *Manufacturer* line.

### Task 2-6-9: Descriptors

**File: ClassicInventoryExclusions.csv**

In *Next-Gen*, non-stock items were referred to as “Descriptors” and are stored in a separate table from *Stock Items*. *Descriptors* cannot be imported and must be entered manually.

Your non-stock items were excluded from the *ClassicInventory.csv* spreadsheet used for *Stock Items* import. All your non-stock items are listed on this spreadsheet (*ClassicInventoryExclusions.csv*), which you can use as guide for manual data entry.

### Task 2-7-4: BOM Routings

**File: ClassicRoutingExclusions.csv**

In *Classic* you could assign a routing to a non-stock parent item, which is not possible in *Next-Gen*. Any such routings were excluded from the *ClassicRoutings.csv* spreadsheet used for *BOM Routings* import. This spreadsheet (*ClassicRoutingExclusions.csv*) lists these excluded routings for your reference.

### Task 2-7-5: BOM Components

**File: ClassicBOMExclusions.csv**

In *Classic*, BOM labor could be defined with non-stock labor items instead of using *Routings*. In *Next-Gen* we are standardizing on the use of *Routings* for labor definition. All non-stock items were excluded from the *ClassicBOMs.csv* used for *BOM Components* import. This spreadsheet (*ClassicBOMExclusions.csv*) lists these non-stock components and can be used as a guide for manually entering *Routings*.

Additionally, in *Classic* you could assign *BOM Components* to a non-stock parent item, which is not possible in *Next-Gen*. All components for such BOMs are listed on this spreadsheet for your reference.

## Phase 3 – Rehearsal

It is imperative that you install the *Training Company* option and have each user do a trial run on the applications he or she will be using. This way you can discover all conversion issues and devise workarounds before you cutover to the *Next-Gen*.

Recommended training tasks and video training courses are covered in the *Rehearsal* phase of the *Implementation Planner*.

## 4. Next-Gen Implementation

### Phase 4 – Startup Day

You will plan for a “startup” day when you will cease using *Classic* and begin running your company on *Next-Gen*. Just prior to startup day you will enter your open sales orders, jobs, purchase orders, customer invoices, supplier invoices, and beginning inventory and GL account balances.

#### **Do not run in parallel**

Do not attempt to run *Classic* and *Next-Gen* in parallel. Instead, make sure your users are fully trained in *Next-Gen* so that when startup day arrives, they are prepared and there will be no surprises.