Users

Recommendations:

1. Delete users from Vision prior to establishing configuration environment in Vantagepoint. Users cannot be deleted from Vantagepoint.
2. For employees not in the Vantagepoint Configuration environment, create basic employee records (First Name, Last Name, and exact employee number as Vision, plus required fields). The employee will need to be linked to the user profile. When transferred, the full employee record will be available in the upgraded database and user profile attached.

Requirements:

1. The User configuration that you see in your Vantagepoint configuration environment **will fully replace** the configuration upgraded from Vision. Users that do not exist in your Vantagepoint configuration environment will not be kept from your Vision instance. Prior to your upgrade, ensure that all users exist in your Vantagepoint Configuration environment or they will need to be manually recreated after the designer scripts are applied.
2. If Employee Numbering needs to be key converted, it must be key converted in Vision and the Vantagepoint Configuration environment.
3. If Org Codes need to be key converted, added to, etc… you must make the same changes in your Vision and Vantagepoint Configuration environment so they continue to match.

Security

Requirements:

1. Roles will be fully replaced based on your Vantagepoint configuration environment. If you add/delete/modify a role in Vision, you must replicate that change in the Vantagepoint database as needed.

Resource Planning

These settings are entirely new for Vantagepoint. They will be fully copied/replaced in the new instance with the configuration in your Vantagepoint configuration environment.

Dashboards

These settings are entirely new for Vantagepoint. They will be fully copied/replaced in the new instance with the configuration in your Vantagepoint configuration environment.

Screen Designer

Requirements:

1. Field security is dependent on the database schema. The schema must be kept in sync.
2. If you create/delete/modify a custom field/grid/UDIC in either database, the same must be done in the other database with the EXACT same naming conventions.
3. Mis-matched field naming can have a negative effect on the success of the scripts and additional clean-up may be needed to rectify any discrepancies between versions.
4. If you delete a field/grid/UDIC in your Vantagepoint configuration environment, and that field/grid/UDIC still exists in your Vision environment, that field/grid/UDIC will show-up as a valid field/grid/UDIC again in your next Vantagepoint database when upgraded. The Designer Scripts will not alter your database schema. In this scenario, you should delete the field/grid/UDIC in your Vision environment as well.

Workflows

Requirements:

1. Workflows will be fully replaced based on your Vantagepoint configuration environment. If you add/delete/modify a workflow in Vision, you must replicate that change in the Vantagepoint configuration environment as needed.
2. If you have a stored procedure or other supporting database elements that the workflow requires, you will need to add that element (stored procedure, web service, new custom field,etc…) manually into your Vision environment or the next instance of your Vantagepoint database. The designer scripts will not move these elements forward from your Vantagepointconfiguration environment but will copy all of the workflows that may reference these elements.

Recommendations:

1. Pay special attention to Vendor workflows or fields related to Vendors especially in a storedprocedure workflow as adjustments may be needed for them to be vantagepoint compliant.

Search and Report

Recommendations:

1. If you wish to create/modify/delete a report or search favorite from the Vantagepoint configuration, you will not need to Delete it from Vision. The configuration you see in your Vantagepoint environment will be the configuration you will see in your next database after thedesigner script process is completed.
2. Once you rebuild a favorite report that came across as read-only, you can delete the read-only report from the configuration if it is no longer needed. The report/search configuration you seein your Vantagepoint Configuration environment will be the configuration that you see in your new environment after the designer scripts have been completed.

Requirements

1. The search and report configuration will fully replace the upgraded configuration. If you delete/create/modify a report from Vision after your Vantagepoint Configuration environmenthas been established, you must delete/create/modify it from the Vantagepoint configuration environment as well.

Invoice/Billing Templates

These templates can be copied over in their entirety from your Vantagepoint Configuration environment. They will fully replace any configuration brought forward from the Vision upgradedenvironment.

Project Templates

Project Templates are not available as part of the designer scripts but it may be possible to create a custom transfer for you. Speak to your consultant about options as needed.