WORKFLOWMAX MIGRATION (updated 17 May 2024)

Many of us are waiting to GoLive in June due to a number of factors. However, even if we are waiting for a specific feature or request before committing to a GoLive date, we can act now to reduce the chance of surprises when GoLive does happen.

What is GoLive?
GoLIve is the date/time you set when the old WFM will stop being used completely, and the new WFM will start being used from that point forward. It is a clean break and there is no ongoing transfer of data.

You can practice migrating the data as many times as you like, and testing in the new file as much as you like, and the old file will not be impacted.

Learnings
The process of migrating the data from old to new is quick and seamless and you might choose to do it yourself, or to have help.

I have opened dozens of new files, overseen some testing, completed so GoLive, and I would hope seen most of the issues that can arise around this process. So here is a summary of what I believe is important to know for preparing for the data migration, and also for coming back in and setting up the new WFM file after the data migration.

This is a brief summary and does not include everything! Some, or all may be relevant to each business depending on what features and how the old WFM is being used.

- Reasons why you might be waiting to set your go live date.
- What to check in your old WFM file before migrating.
- Before and After the GoLive migration.

What are the reasons you might delay GoLive? (end of migration window is 26 June 2024 and there is no delaying after that!)

- **The Mobile App.** At the moment the beta app is scheduled for release at the end of May 2024. If you can't do without the App, then you have to wait. It is possible to get into the website on a mobile phone and add time that way but it's clunky.

- **Large numbers of migration errors** There are still some very old files which are generating a lot of errors when migrating attached documents. BlueRock has said some of these will be fixed. There are alternative options to save all documents if there is concern about relying on a BlueRock fix.

- **Reports not available.** Some standard reports have only due for release in mid June. Same with the custom reporting, some of the WIP reporting is being released quite close to the end of the migration window. There have also been major issues with reports pulling in very wrong data – this is being fixed as a high priority. Check the release schedule.

- **Intermittent sluggish performance.** Performance is getting a lot better and is now only generally an issue for businesses that work at high speed.

For Living Business, we are going to be stretched to capacity assisting clients migrating in June. We are working hard right now to do all we can to mitigate that capacity squeeze.

What to check in your old WorkflowMax file to prepare?

1. **Do you have the correct permissions?**

   You are going to run the data migration yourself, the email you use must have full permissions in the old WorkflowMax file, including 3rd party API access.

   If you are going to disconnect and reconnect the Xero integration you will also need Standard or Advisor permissions in normal Xero, for the same email.

2. **Are you reliant on the app?**

   The Beta is due out late May. All functionality will eventually be there, but initially it might only be time sheeting.

3. **Are you reliant on any reports?**

   Cull out any Custom Reports not required.

   Do you need to wait for the release of some standard reports (like WIP reports due mid May)? Are there custom reports you can't build in the new WFM yet?

   Ensure you have the custom report details saved, including the type of report as well as all the required fields and settings.

4. **Do your Custom Print Templates upload successfully in the new WFM?**

   Cull out any Custom Print Templates not required. There is a chance tweaks may be required.

5. **Do you need attached documents / photos / emails to migrate?**

   With documents / photos / emails uploaded into WorkflowMax, do you want or need these migrated.

6. **Do you use the Collaboration Email yourbusiness@emailmyjob.com ?**

   This email will be changed to yourbusiness@emailworkflowmax.com, so plan to ensure nothing accidentally goes to the old email after GoLive.

7. **Are all emails in WorkflowMax current and accessible?**

   If staff are logging into the old WFM using non-current emails they won't be able to access the new WFM login invite. I recommend not updating old WFM but having all current emails available so you can update in new WFM before inviting in staff (easy to update)

What to check in your new WorkflowMax trial file?

Open a new trial file and initiate a trial data migration. This is a quick and seamless process. This file will become your real file, once you complete a GoLive migration.

Access the file and start testing as applies for your business.

1. **Test all your current processes** to confirm everything you normally do is working as expected in the new file. There are some changes to become familiar and work through any changes required.

2. **Consider testing integrations** if you have any others beyond Xero. The Xero integration is up and running but many others are not available yet.

3. **Check any reports** you rely on are available as standard or can be custom built.

4. **Check any Custom Print Templates** work as expected by uploading into the new file and testing.

5. **Check your organisation logo** has the specific requirements to be able to upload (930 x 310 pixels – 300 dpi).

6. **Test your new collaboration email** yourbusinessnamehere@emailworkflowmax.com

Before and After the GoLive migration.

All information, reports, or tests run in the new file will be wiped out when the GoLive migration happens.

The old WFM will never be used again, but you may access it to view and compare until 26 June 2024 (if not cancelled prior)

Before:

1. Disconnect the Xero Integration between Xero and the old WFM. Screen shot the integration settings from old WorkflowMax because once you disconnect you won't be able to see what the settings were.

2. Re-name the old collaboration email to prevent staff accidentally sending to the old email. E.g. if your email was livingbusiness@emailmyjob.com, then you could change that to livingbusinessxxx@emailmyjob.com

3. Lock down the old WorkflowMax file in the organisation settings by locking the WIP Lock Date and the Period Lock Date. You can select a day up to the day before, so as soon as you lock this down, no-one will be able to enter any data from that locked day onwards.

4. Consider marking staff in the old file as Not Working to prevent them adding time or costs historically.

After:

1. Update any old emails as required as staff are invited back into the new WorkflowMax.
2. Reconnect the integration to Xero
3. Upload any required Custom Print Templates
4. Rebuild any required Custom Reports
5. Import the Organisational Logo
6. Set up the new Collaboration Email
7. Set up any personalisation such as your email signature.
8. Back up your data using the new bulk export options in the old WorkflowMax
9. Cancel the old WorkflowMax subscription if you don’t want it to run until 26 June 2024.