

Conversion Notes for Harmony Light v4.3.6 to v5.00

- 1 The conversion can be run more than once, but each time it is run, it will clear the v5.00 files and start again.
The conversion program DOES NOT affect the original v4.3 data, it simply takes a copy from it.
- 2 The conversion program can be run from the v5.00 installation or from the Harmony Software menu option in Windows Start, Programs list
- 3 When you start the conversion program, it will initially ask you to select the starting financial year to convert from with a drop down box which starts 1st July 2000
 - a. Select the year that you want your data converted from
 - b. This is an opportunity to leave your old data behind
 - c. Once you have selected a year, this is what will happen:
 - i. Any account transactions, timesheets and receipts dated prior to the year chosen will NOT be converted
 - ii. Archived families with no transactions, timesheets or receipts dated after the selected start period WILL NOT be converted
 - iii. BAS statements prior to the date chosen will NOT be converted
 - iv. Even for active families, receipts dated prior to the date chosen WILL NOT be converted – as the v5.00 has a running balance feature, all non converted receipts will be reconciled against the relevant timesheets and if they do not match, a balance carried forward transaction will be created
 - d. Next, just to make sure that you really do want to do the conversion, Harmony will ask you to type the word ‘yes’ before you are able to continue.
- 4 REMEMBER: Your old v4.3.6 data will remain intact, so if you make the wrong choice, you can always do the conversion again.
- 5 Once the conversion is complete, here is what you will see:
 - a. Various names and addresses etc that were entered as Uppercase in v4.3 are converted to Proper case, e.g. “SMITH” will become “Smith”. You may find the odd item that has been converted incorrectly, e.g. ABC will become Abc, but it is a simple matter to re-type and save them in v5.00.
 - b. All the family numbers have been increased to 5 digits, therefore a leading zero will have been placed on all the codes e.g. F1020 will be F01020
 - c. The old Accounts Master/Detail format has been changed in v5.00. Whereas in v.4.3.6 you would enter a single transaction with multiple account items, v5.00 has been changed so that each account item is a single transaction. Therefore, if you had a single transaction with multiple items in v4.3.6, these will have been converted into separate transactions.
 - d. Harmony v5.00 has been re-designed to look and feel like your schemes system and consequently, a couple of processes have changed to reflect this:
 - i. In v4.3.6, you were able to select or type the CCB% on bookings/contracts or timesheets. This was a very static mechanism; In v5.00 you enter the CCB percentages as per the Assessment Notice that the scheme receives including a Start Date, and then tell Harmony how many children in care. Harmony will pick the correct percentage for the date of the timesheet/estimator that you are processing.

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This is more dynamic, it allows you to enter CCB percentages in advance, and it will pick the correct one when the new percentage starts and/or finishes.

That was a long preamble to tell you that v4.3.6 didn't know how many children were in care on the old timesheets, and so will attempt to match the percentage used with the static percentage table. If this is not possible, it may display a zero percentage on old timesheets, BUT it won't change the calculation unless you attempt to edit the old timesheet.

- ii. In v4.3.6, there is a very static method of telling Harmony that a child was at school. In v5.00, Harmony requires a school start date as well. This allows you to pre-enter a child's school start date so that it will automatically use the 85% loading once the school start occurs. It was possible in v4.3.6 NOT to tick the Apply School Age percentage flag in a child's record, but still use the 85% by entering it directly into the booking or timesheets. If this is the case, the conversion program will attempt to discover the child's school start date from the timesheets. If the apply school % flag is set it will use the date 31/1/2005. This date doesn't have to be exactly when they started school, just as long as it is prior to your next timesheet processing period.
- iii. In v4.3.6 you were able to create multiple bookings/contracts, but had to choose which one to use manually when you did your timesheets. V5.00 allows multiple bookings, with 1 to 4 week rosters, but most importantly you are now able to put start and stop dates on bookings.
Therefore, the conversion program will ONLY convert the active booking and it will generate a start date equivalent to the child's start date
- iv. Your v4.3.6 fee schedule will be converted but the word Standard has been changed to Main. You don't need a new fee schedule from your scheme until your fees change next time. However, don't forget, you can pre-load a new fee schedule, because each one has a start date attached to it.
REMEMBER: If you ask your scheme for a another fee schedule, ask them to use the NEW option to Export the fees.
- v. In v4.3.6, timesheets had a status of In Progress or Completed. This has been changed to In Progress and Receipted.
- vi. The immunization schedule has been changed to include 2 new vaccine times, birth and 10 years and the 4 year vaccine time has been changed to 5 years.