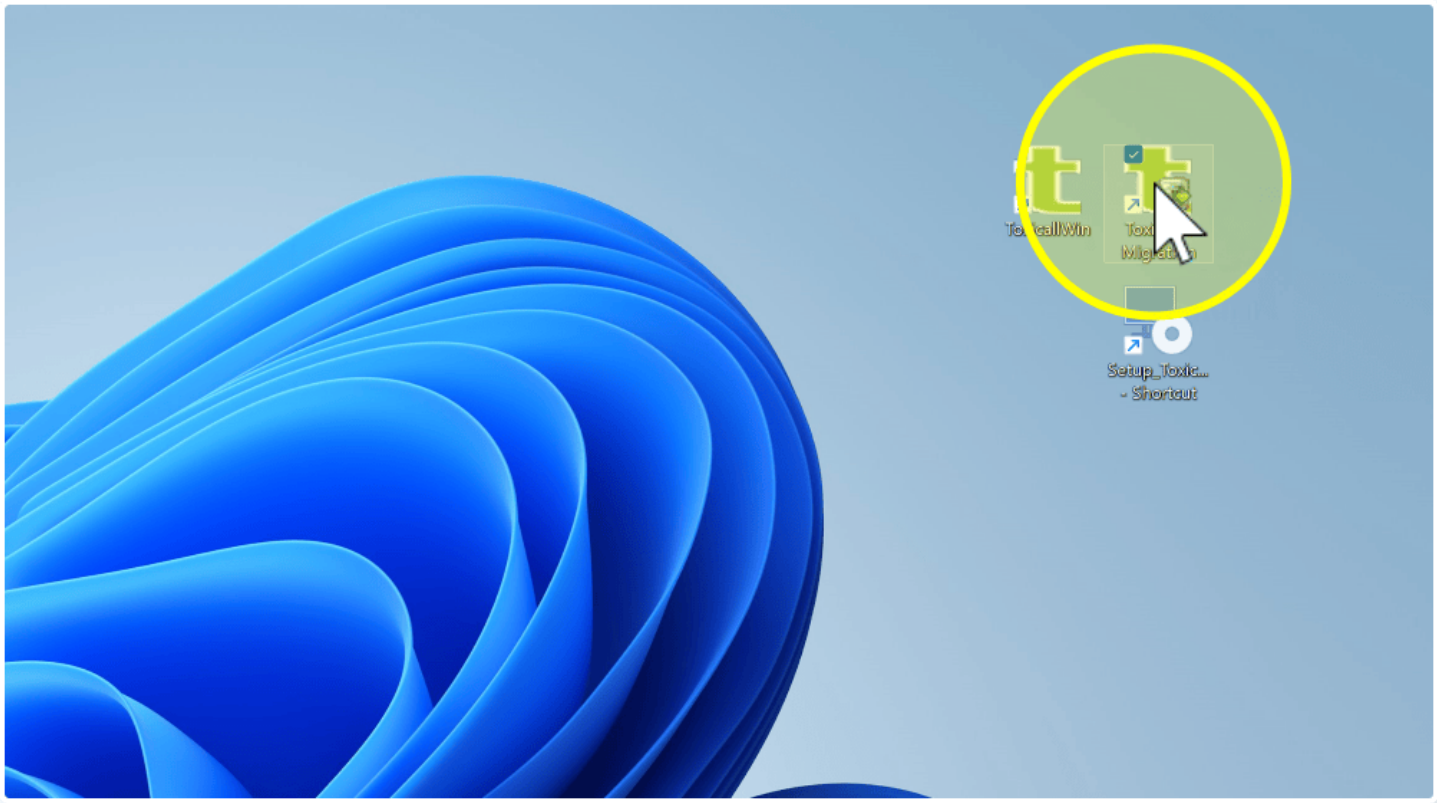
toxiCALL® 5 Migration from toxiCALL® 4

Walk Through Guides · https://toxicalldemo.com/docs/tox5migration/toxicall-5-migration-from-toxicall-4/

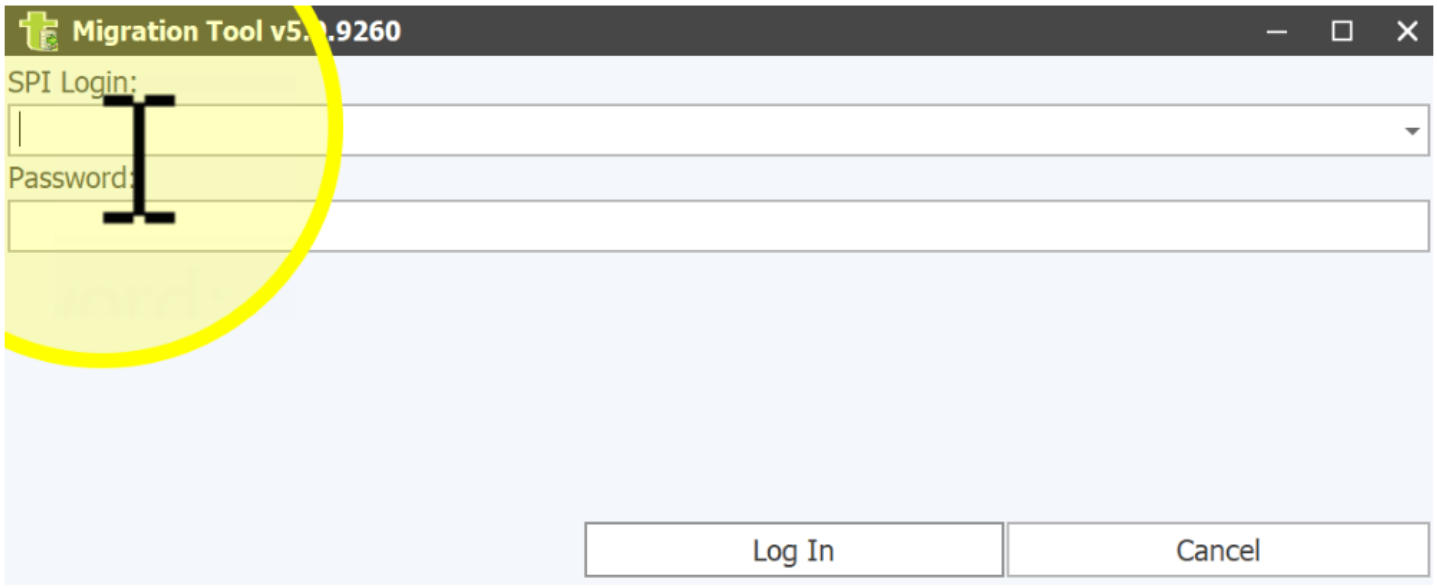
Heading sections have been created for the most common selection options used in Migration.

Double click "ToxiCALL Migration"



Type your toxiCALL® 5 Login name and password.

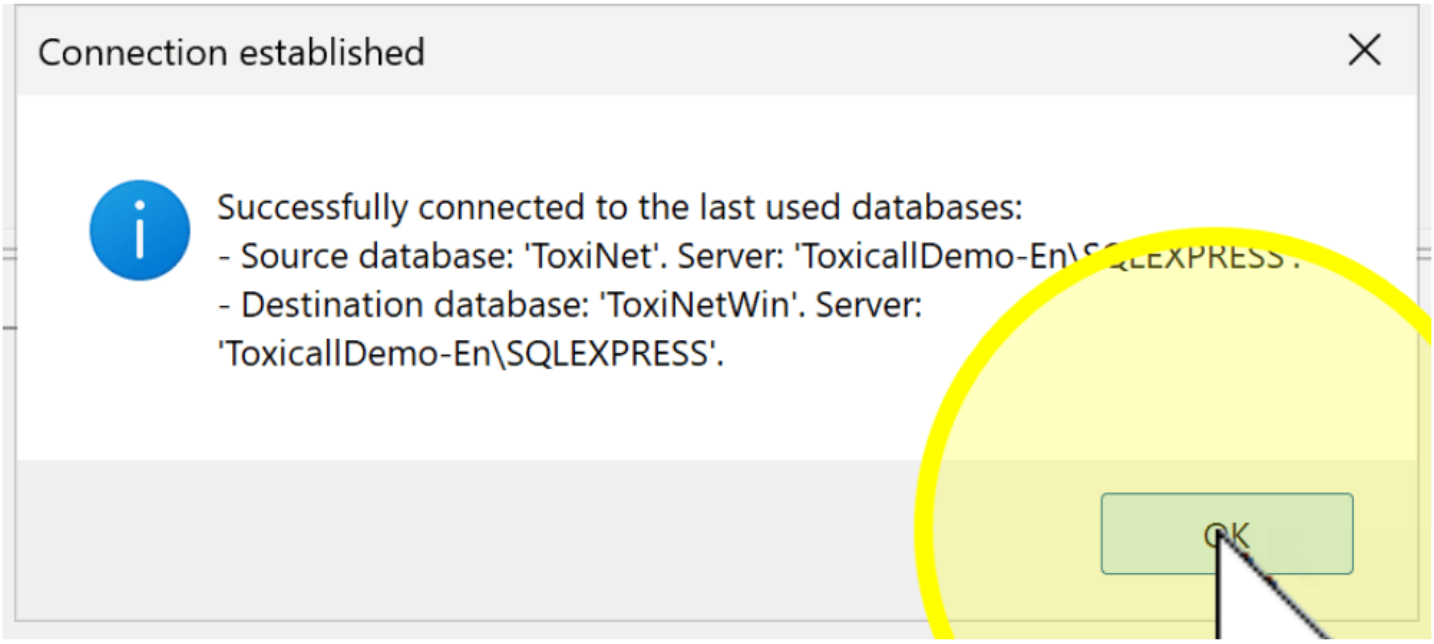
If migration has not yet been completed, use the Admin account.



Default Database

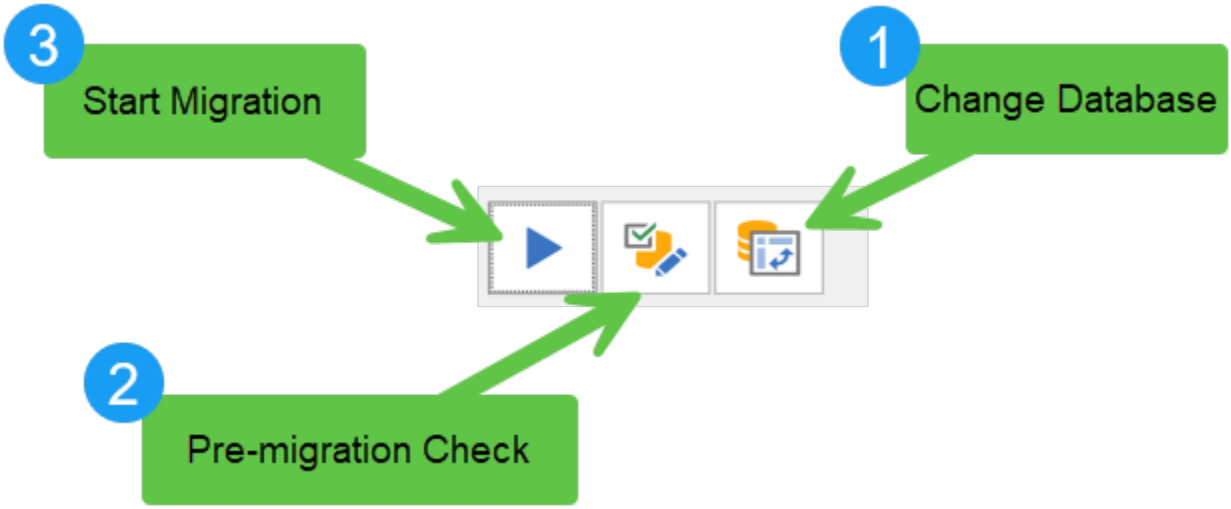
The default database created during the toxiCALL® 5 setup will be used. This setup must be completed with a connection to your existing toxiCALL® 4 database on the same server.

Confirm the source (toxiCALL® 4) and destination (toxiCALL® 5) databases are configured as expected.



Pre-Migration Check

Before migrating, the pre-migration check will allow you to confirm Login names and passwords.



Password Verification

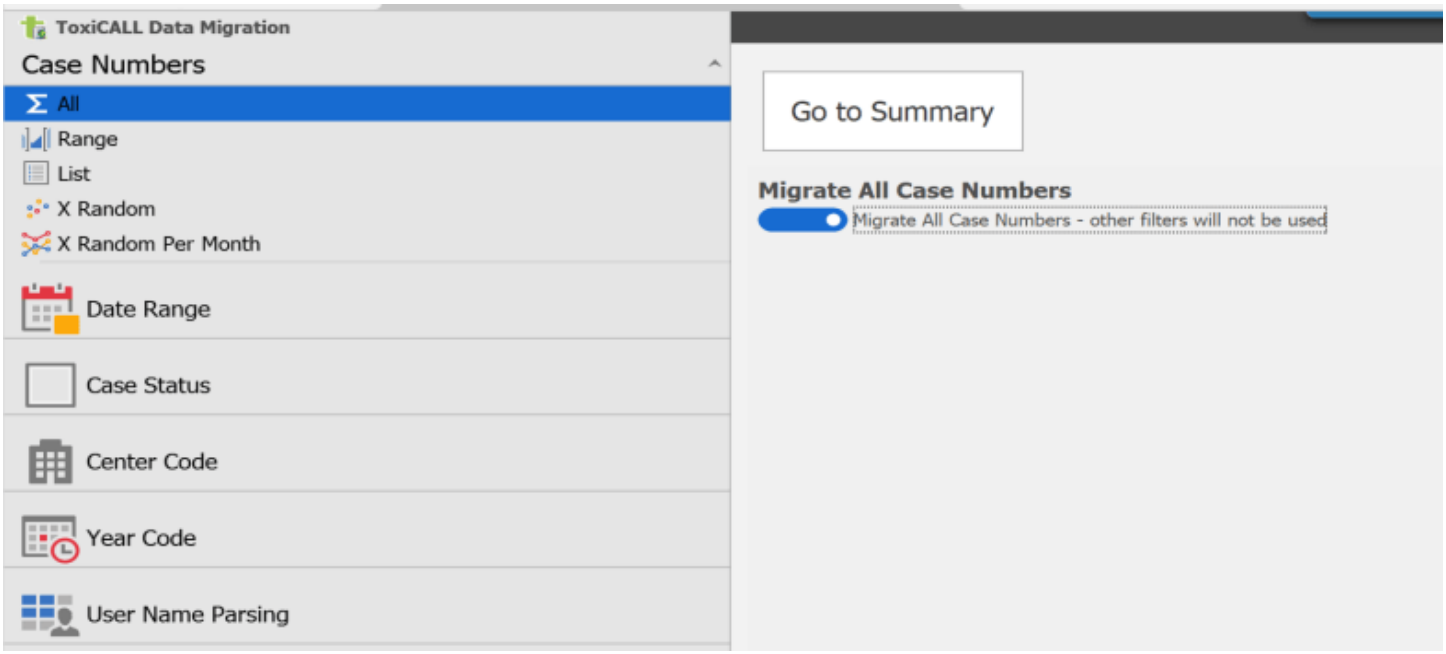
toxiCALL® 5 migration will carry over the toxiCALL® 4 passwords and update them if necessary. The pre-migration check allows you to have users update passwords before migration.

In the migration options, you can choose to have a new password generated for users, which requires a password change.

After migration, a CSV file will be displayed showing the password migration details.

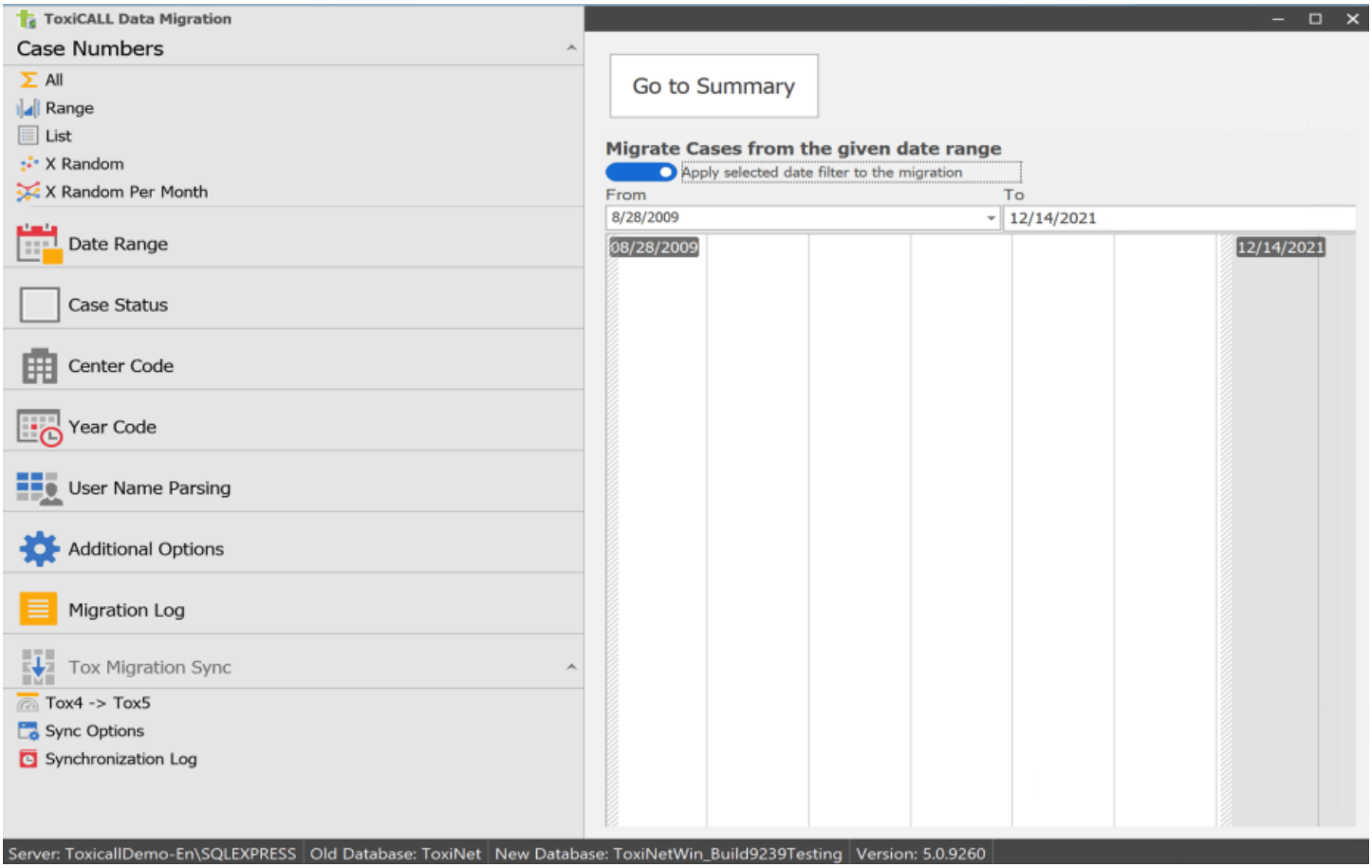
Verify that All Case Numbers are selected.

Other options are available if you want to migrate random or specific cases.



The Date Range section is optional.

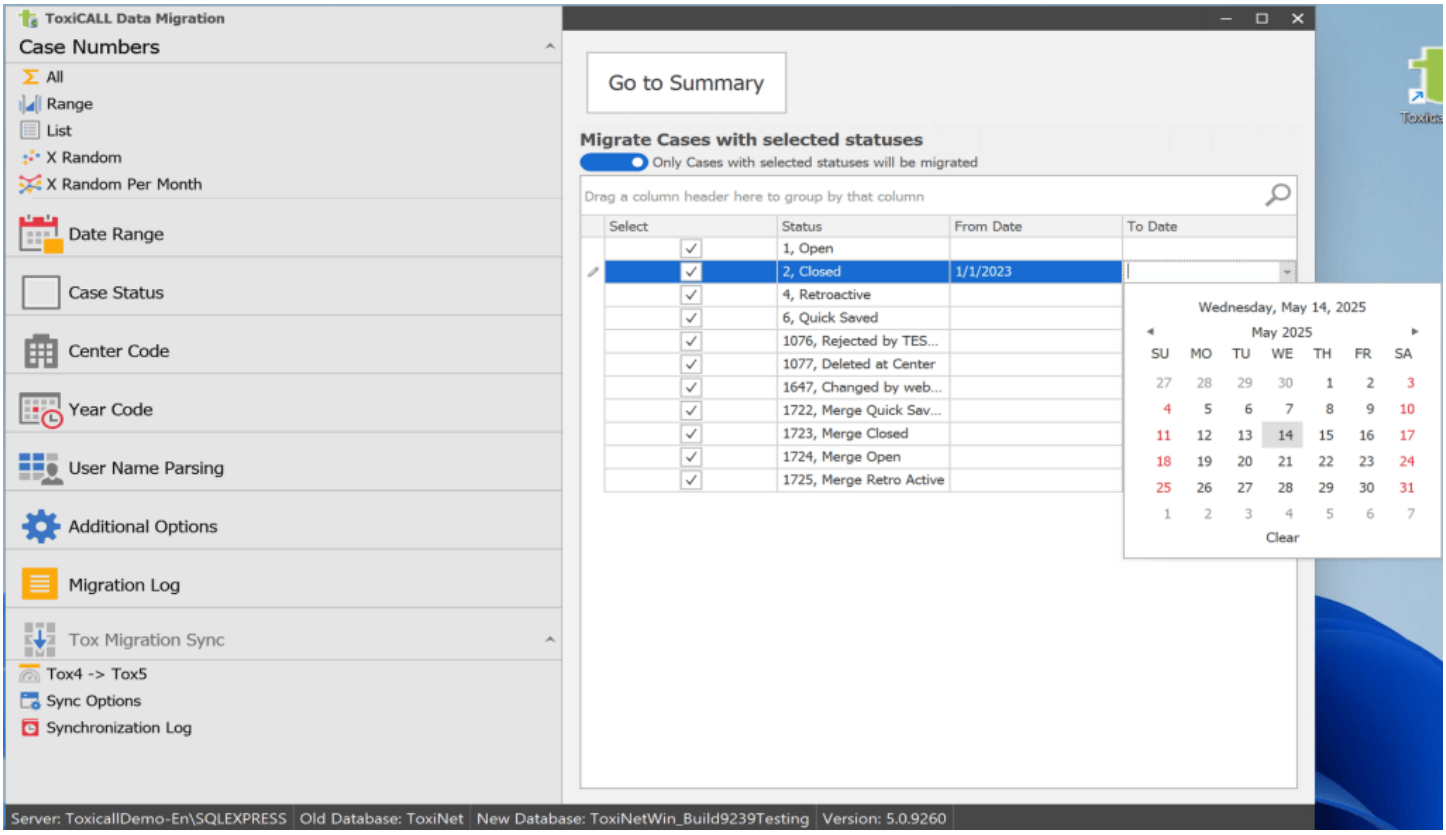
Using the Case Status may be a better option.



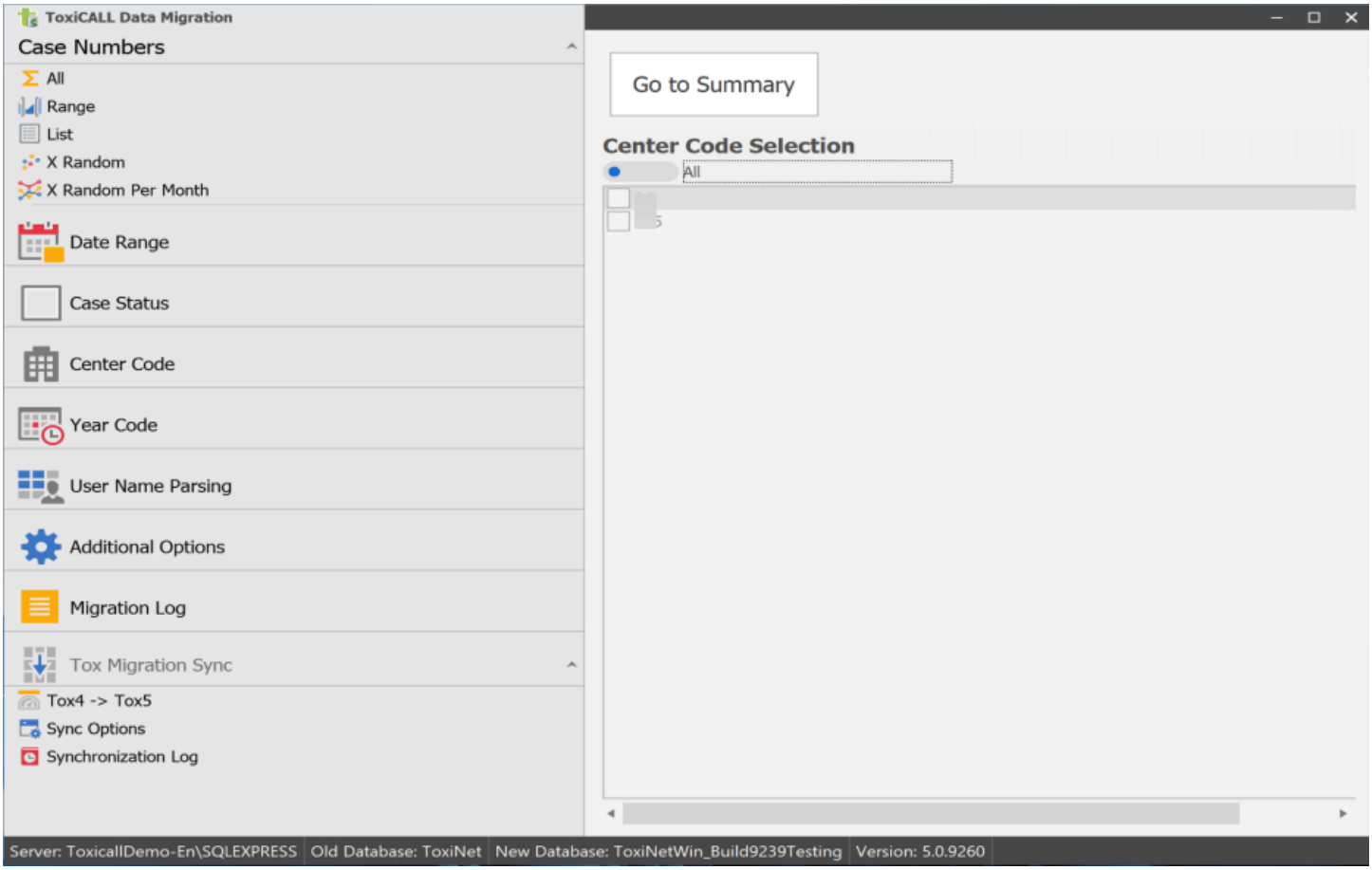
Case Status Selection

Case Status is recommended. Include all case status options and choose the desired date range for closed cases.

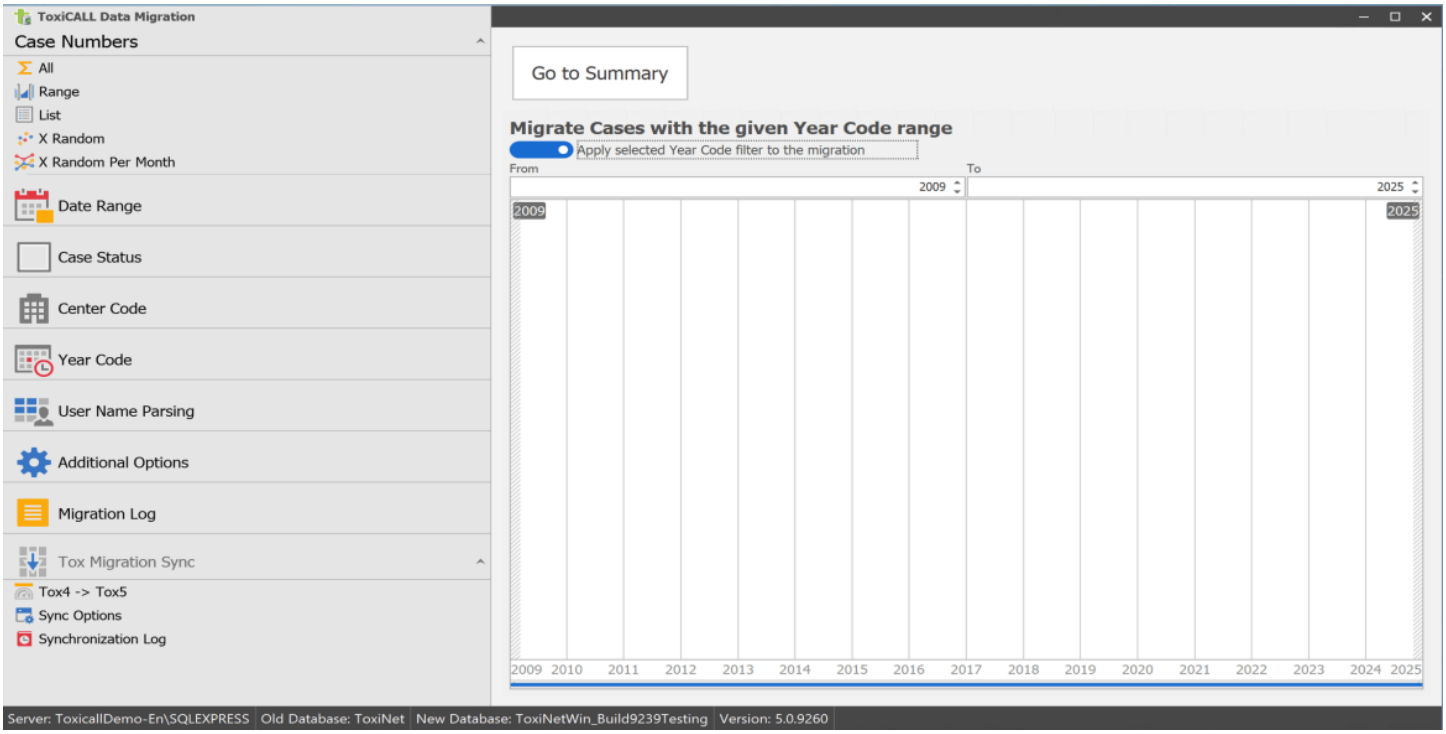
More details



Optionally choose which Center Codes to include in the migration.



Optionally choose which year codes to include in the migration.

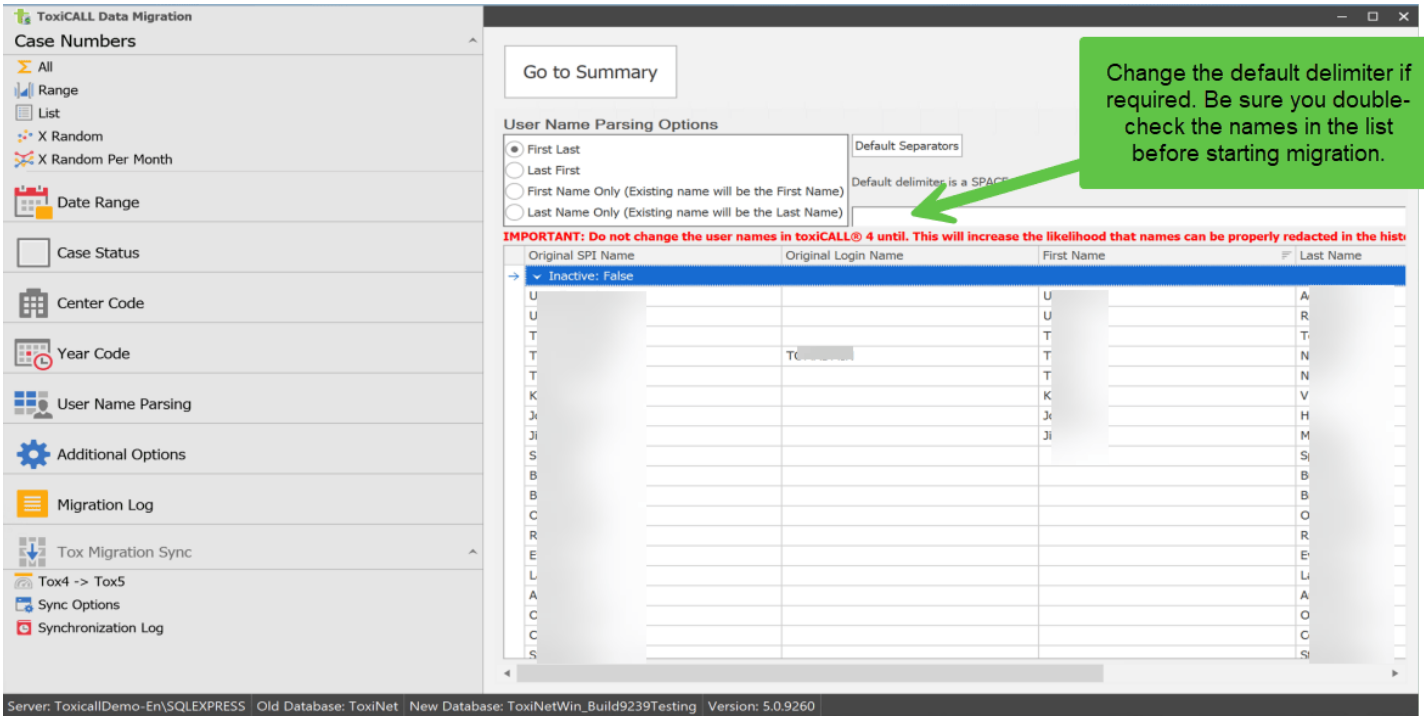


User Name Parsing

Important: Ensure the user names are migrated adequately to First and Last Names.

The Delimiter can be set to a comma with space ', ' if names are entered as "Last, First"

More Details



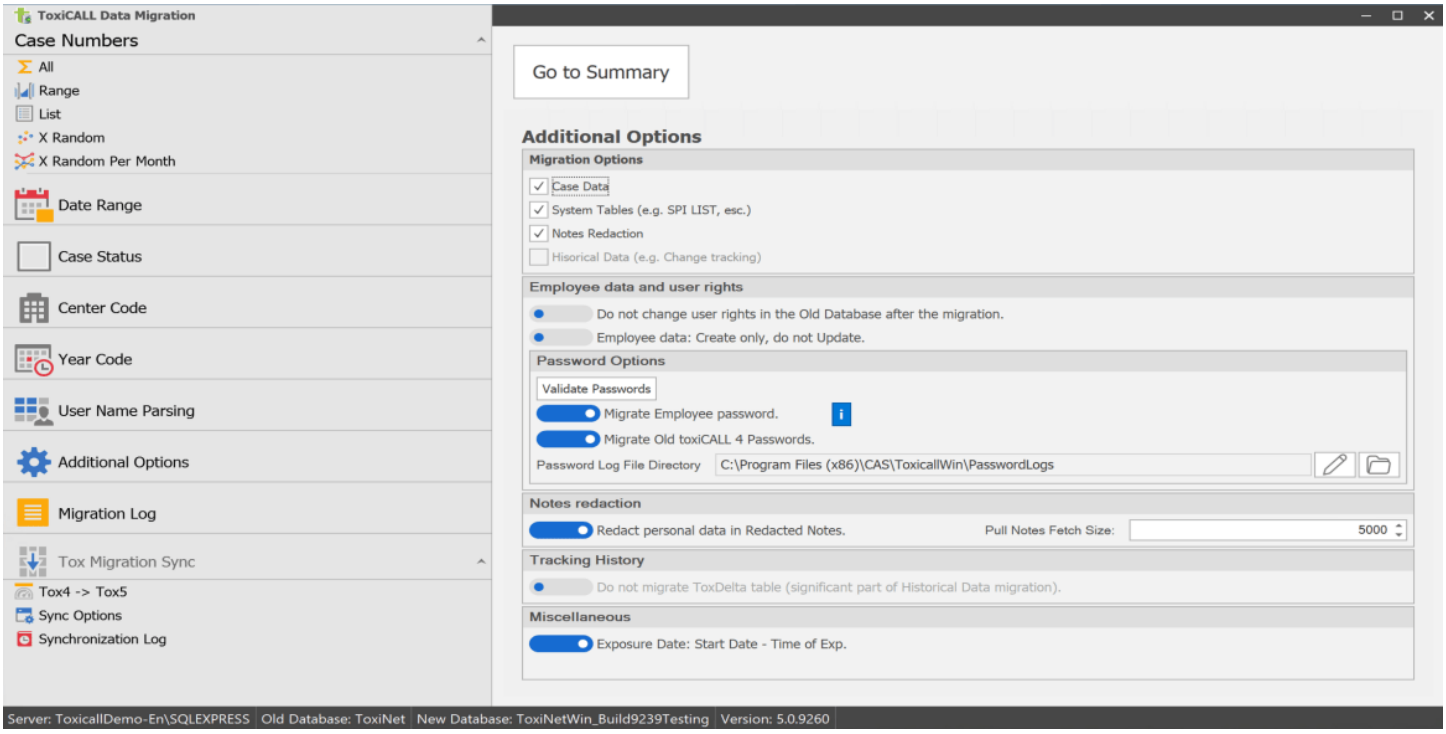
Do Not Change toxiCALL® 4 User Names

We do not suggest changing the user names before migration. The migration routine will attempt to redact SPI Names from the timestamp in the case notes, and the redaction cannot be performed properly if the names have been changed.

Additional Options

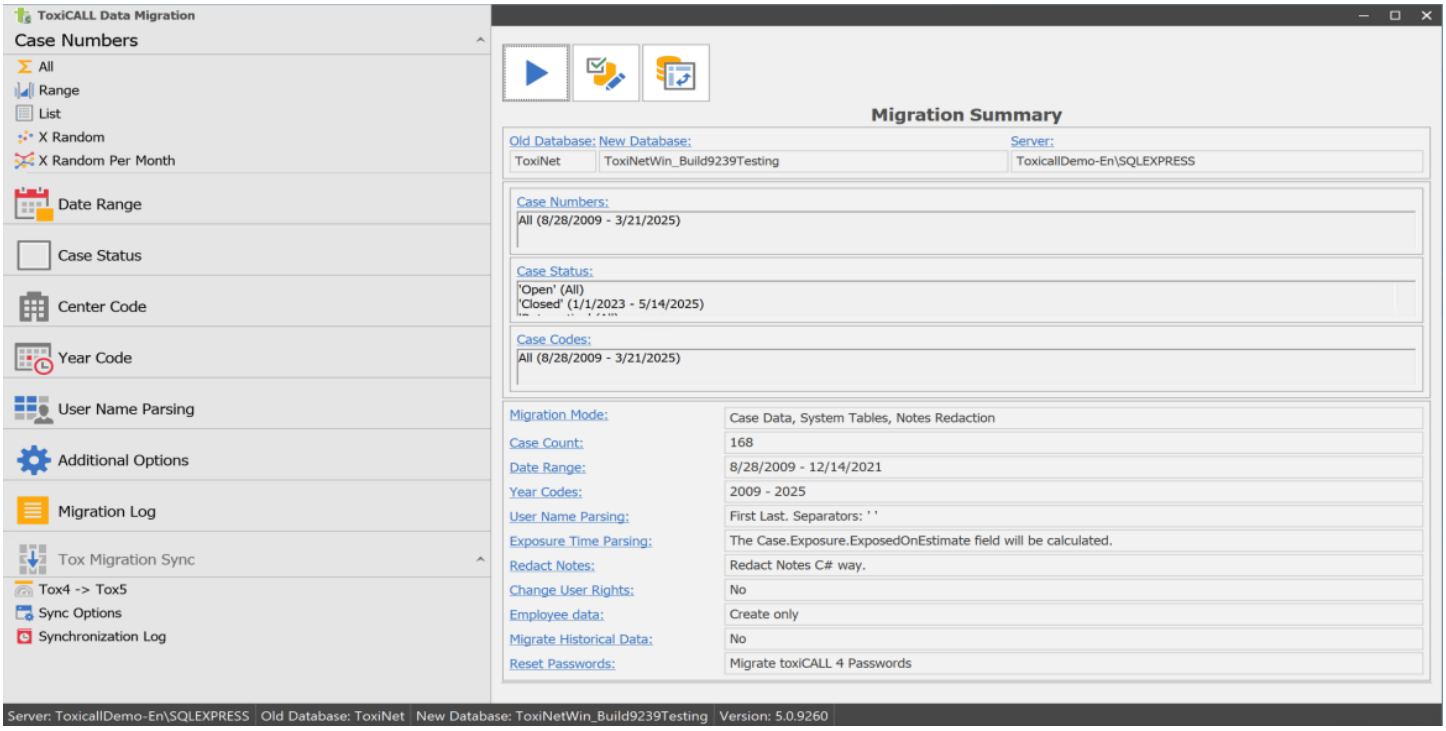
Here you can choose which features to enable/disable for migration.

More details



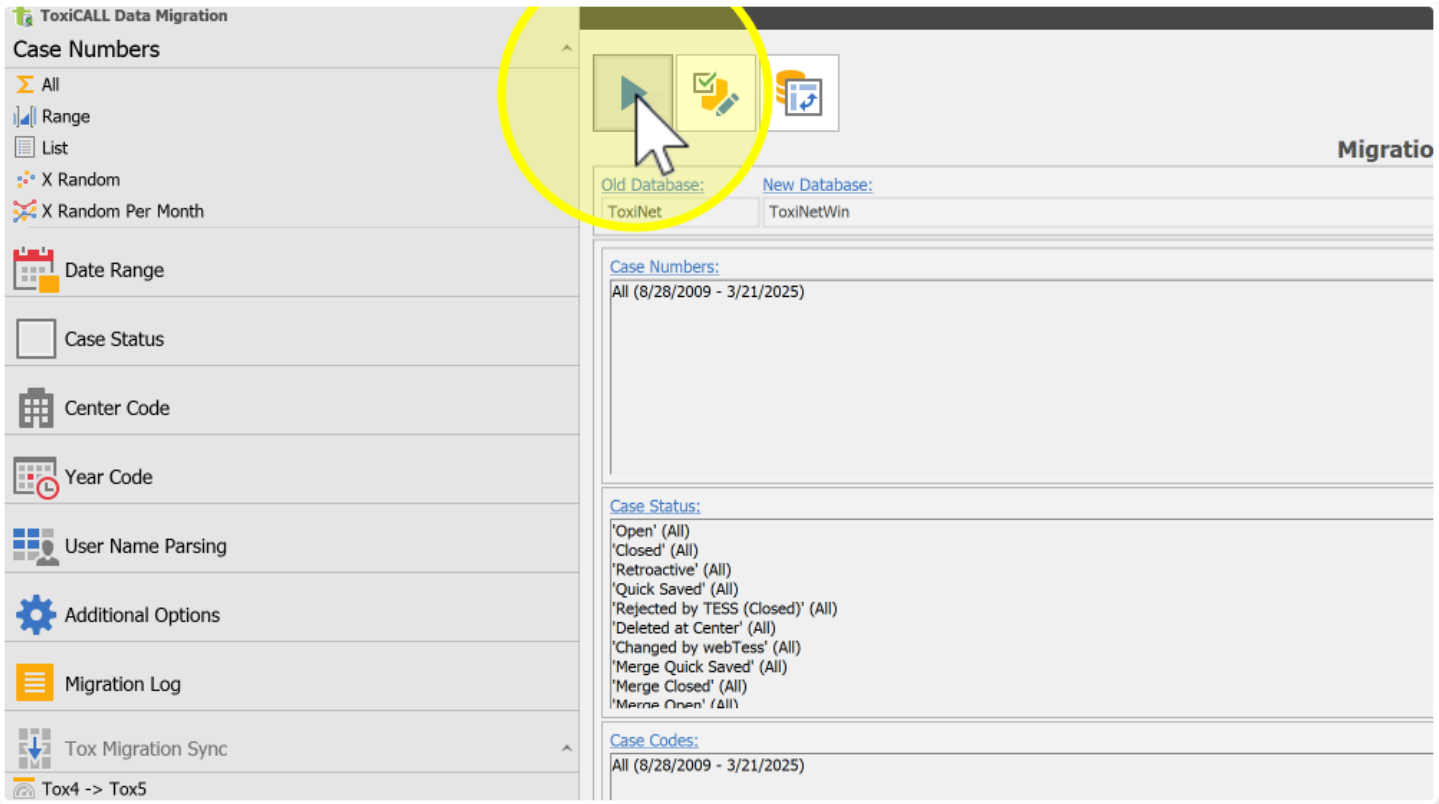
Migration Summary

The summary will confirm your choices before beginning migration.

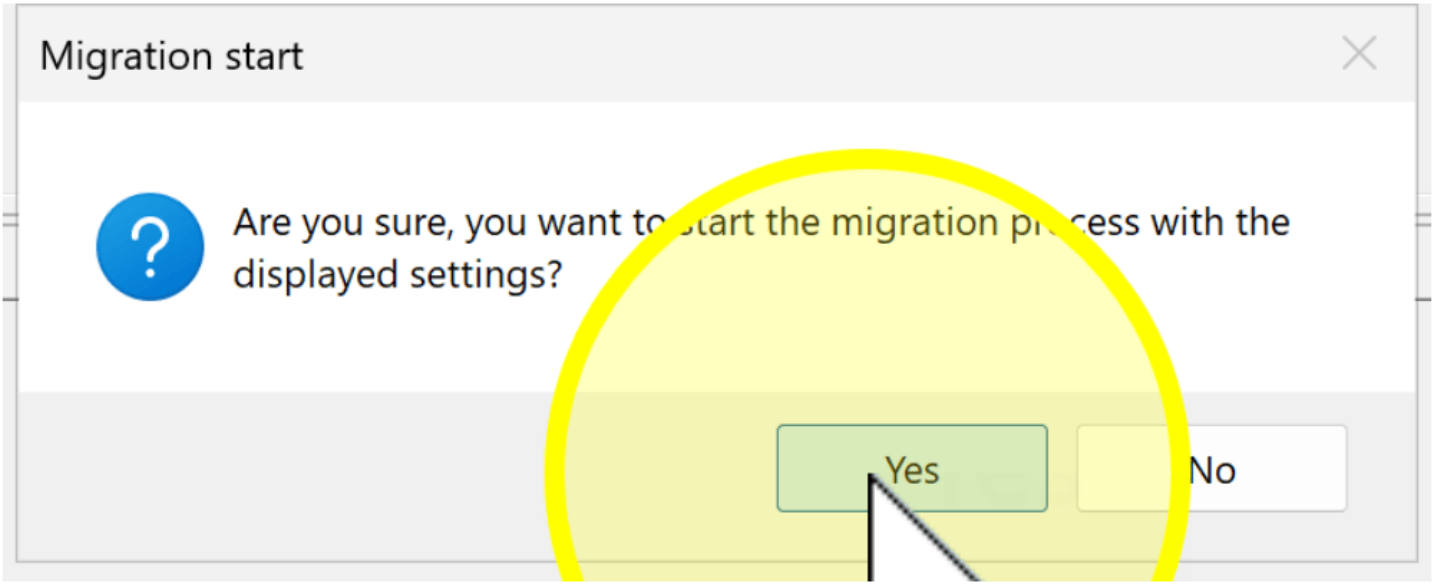


Start Migration

Click "Start Migration"

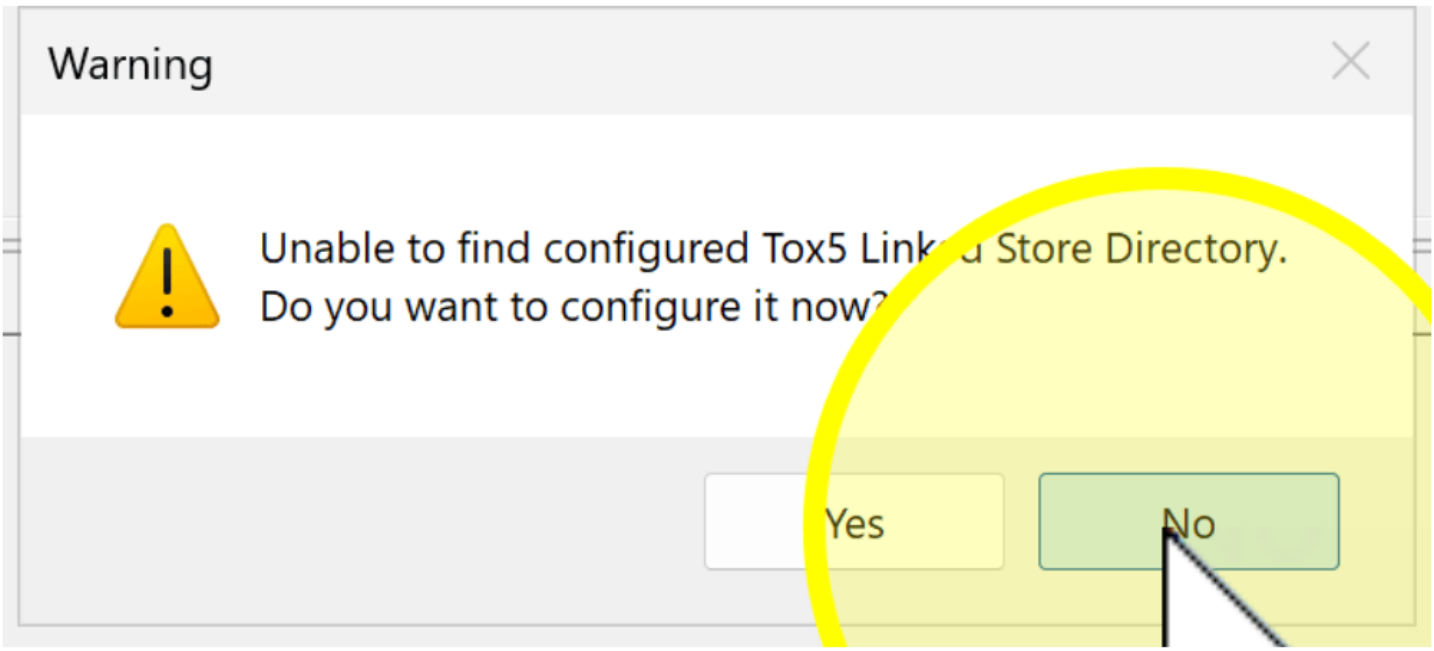


Click "Yes"

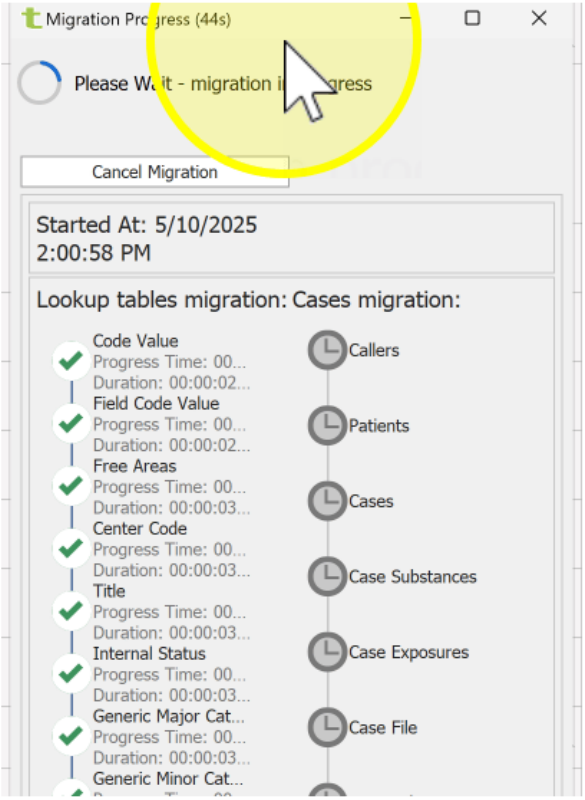


If the Tox5 Linked Store Directory has not been configured, this is not a problem.

This is the file share location where your linked case files are stored. Migration will be completed successfully, and this can be configured later in the toxiCALL® 5 program options.

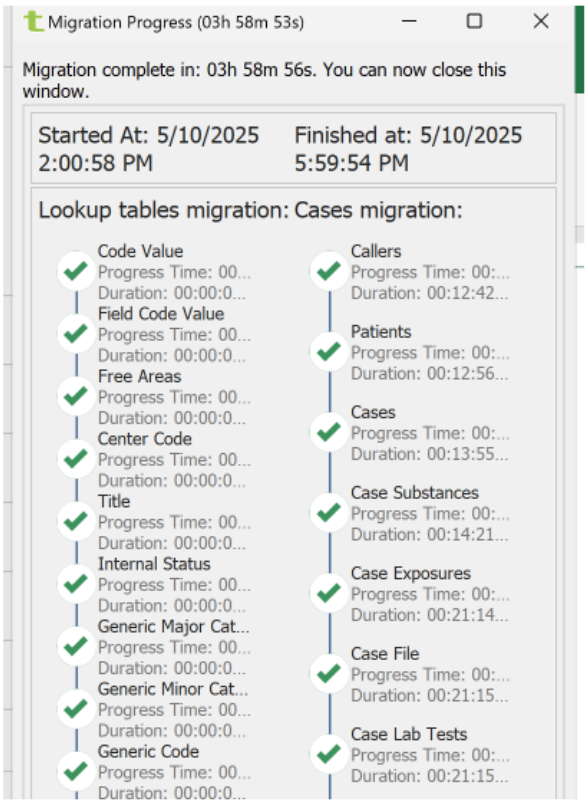


Migration Process & Status

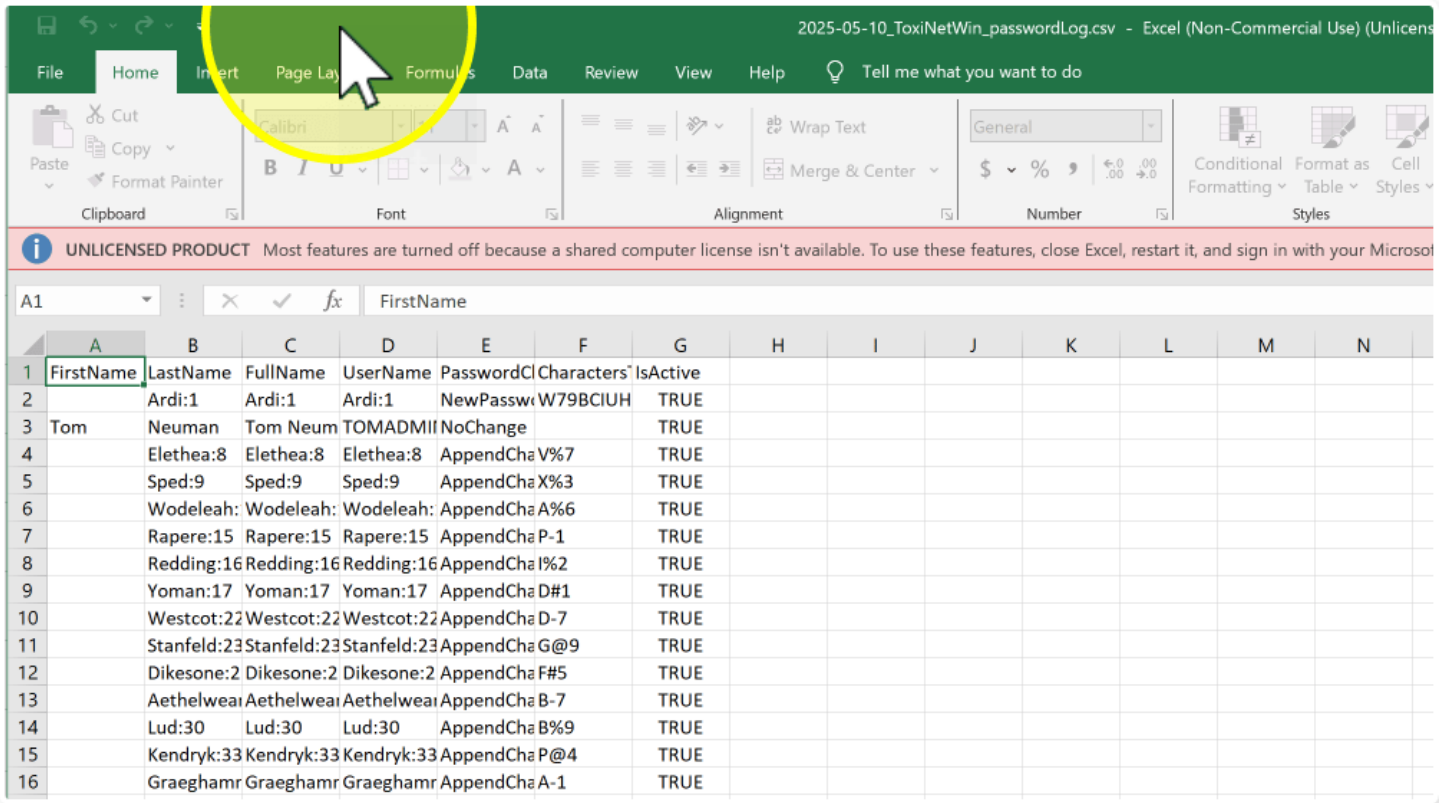


Migration Complete

Once migration is complete, the status window will provide details showing the completion status



After migration, a summary of the usernames and password status is displayed. This can aid users when logging into toxiCALL® 5 for the first time after migration.



	A	B	C	D	E	F	G
1	FirstName	LastName	FullName	UserName	PasswordCl	Characters	IsActive
2		Ardi:1	Ardi:1	Ardi:1	NewPassw	W79BCIUH	TRUE
3	Tom	Neuman	Tom Neum	TOMADMII	NoChange		TRUE
4		Elethea:8	Elethea:8	Elethea:8	AppendCha	V%7	TRUE
5		Sped:9	Sped:9	Sped:9	AppendCha	X%3	TRUE
6		Wodeleah:	Wodeleah:	Wodeleah:	AppendCha	A%6	TRUE
7		Rapere:15	Rapere:15	Rapere:15	AppendCha	P-1	TRUE
8		Redding:16	Redding:16	Redding:16	AppendCha	I%2	TRUE
9		Yoman:17	Yoman:17	Yoman:17	AppendCha	D#1	TRUE
10		Westcot:22	Westcot:22	Westcot:22	AppendCha	D-7	TRUE
11		Stanfeld:23	Stanfeld:23	Stanfeld:23	AppendCha	G@9	TRUE
12		Dikesone:2	Dikesone:2	Dikesone:2	AppendCha	F#5	TRUE
13		Aethelwea	Aethelwea	Aethelwea	AppendCha	B-7	TRUE
14		Lud:30	Lud:30	Lud:30	AppendCha	B%9	TRUE
15		Kendryk:33	Kendryk:33	Kendryk:33	AppendCha	P@4	TRUE
16		Graeghamr	Graeghamr	Graeghamr	AppendCha	A-1	TRUE

Miration Synchonization

If you wish to keep cases synchronized between toxiCALL® 4 and toxiCALL® 5, you must ensure that toxiCALL® Synchronization is enabled.

Migration Logs

Migration logs are available to view details on information and errors that may have occurred during the migration process.

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