WissIntra®7.0

Migration

Manual

Schnipsel snp_copyright_trademark_e.xml nicht gefunden!

Contents

Version

2015_10_27_V05

1   About this manual

Welcome!
This manual is designed to support you working with WissIntra®.
A number of instructiions and tips are provided to facilitate your work and help you reach your objectives more quickly.
We are always at your service to answer questions and take up suggestions.
Your WissIntra® Team

WissIntra® Hotline:
(Monday to Friday from 09:00 - 12.00 to 13.00 - 17:00)
For WissIntra® customers - depending on your SLA license for maintenance outside of Germany.

Note:
Please contact your internal contact partner for WissIntra® to learn more about your license and its permissions.

Phone.: +49 711 578813 -13

For WissIntra® customers - depending on your SLA license for maintenance within Germany.

Note:
Please contact your internal contact partner for WissIntra® to learn more about your license and its permissions.

Phone.: +49 9001 000696

(1,49 €/ min. from the German Telekom network, wireless prices can deviate)

Customer support:

k+k information services GmbH
Höhenstraße 16

D - 70736 Fellbach

Fax: +49 711 578813 -77
E-Mail: Servicedesk@WissIntra.de
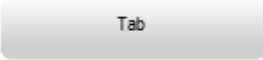**Internet: http://www.wissintra.de**

Gender-related conventions:

Since the practice to treat female and male persons through appropriate forms of speech equal, makes the reading of the texts very tedious, we use in all cases where the natural gender does not matter, male and female forms arbitrarily.

In the form used in each case both natural gender are subsumed, e.g. "auditor" includes women and men, "program manager" as well.

Typographic conventions:

We adhere to the following typographic conventions:

- Paths to modules, lists etc. are basically shown in *italics*. The individual components are separated by ▶ from each other.

- [Button] Buttons are shown either neutrally or in the color of the corresponding module.

- Tabs are shown by this [Tab] or TAB NAME.

- Safety and warning signs are indicated by this:

NOTICE	
⚠	**Signal word** • type and source of danger • escape • impact • rescue

- Useful suggestions are indicated by this:

> 💡 **Note:**

- Tips are indicated by this:

> ℹ **Tip:**

1.1   Important Notes

Reading note

This manual contains important information and instructions for the migration of data from WissIntra®
6.3 to WissIntra® NG.
Keep this manual so that the user has access at any time.

Read the manual before getting started with WissIntra®. Keep the manual at hand in a tidy, complete
and legible condition over the entire utilization phase.
This documentation referes exclusively to the version described hereafter and is not subject to the
modification service of k+k information services Gmbh.

This manual focuses on a safe use of the software. For further details concerning the other modules of
WissIntra® refer to the corresponding manual of each module.

Appropriate use

This manual is an essential help for the safe and proper use of the software for the migration of data.

This documentation does not claim to be complete and exact in every detail.
For damages that occur in connection with this software by loss of data, accidental misuse, insufficient
knowledge of the documents or reasonably foreseeable misuse or other improper actions, k+k
information services GmbH will not be liable.

Copyrights

This documentation may not be copied or distributed-either in part or in total, without written consent of
k+k information services GmbH. This documentation may not be saved on any data mass memory
without written consent of k+k information services GmbH. Nor may it be given to third parties or used
in any other improper way without approval of k+kinformation services. All rights including the
translation are reserved by k+k information services GmbH. Infractions of this copyright will have legal
consequences including claims for compensation.

2 Reading note

Before you migrate your data from WissIntra® 6.3 to WissIntra® NG read the following text carefully.

Note:
The data migration is irreversible. Thus, read the following text carefully.

Note:
Create a dummy user and ensure that all users in WissIntra® 6.3 have a valid e-mail address.

Note:
If you don't have installed the latest WissIntra® 6.3 version (for e.g. WissIntra SMB), provide us with your database at least 1 working day before migration so that we can support you.

Note:
Complete all open release workflow in WissIntra® 6.3.

2.1   Technical Requirements

For a successful migration you need to fulfill the following technical requirments:

Note:
The current WissIntra® 6.3 version must be available, otherwise you need to update your older version.

- .Net 4.5
- Access on the WissIntra® 6.3 database (SQL server, authentification, TCP/IP)
- Access to the directory for the default and result documents and all files in this directories **or**
- Access to the versioning directories (if the versioning of documents is set active) and all files in this directory

- ➢ For the latter options applies: access should be available with the path information that is stored in the WissIntra® 6.3 database.
- ➢ Otherwise, the paths should be changed in the database.

2.2   Preparations

Each user in the WissIntra® 6.3 database should have a distinct and valid e-mail address.
This e-mail address receives later on the password for the user.
Each e-mail address should exist only once in the user list.
Our clients define the e-mail address for the dummy user themselves.

3   Options for the migration

Administrator

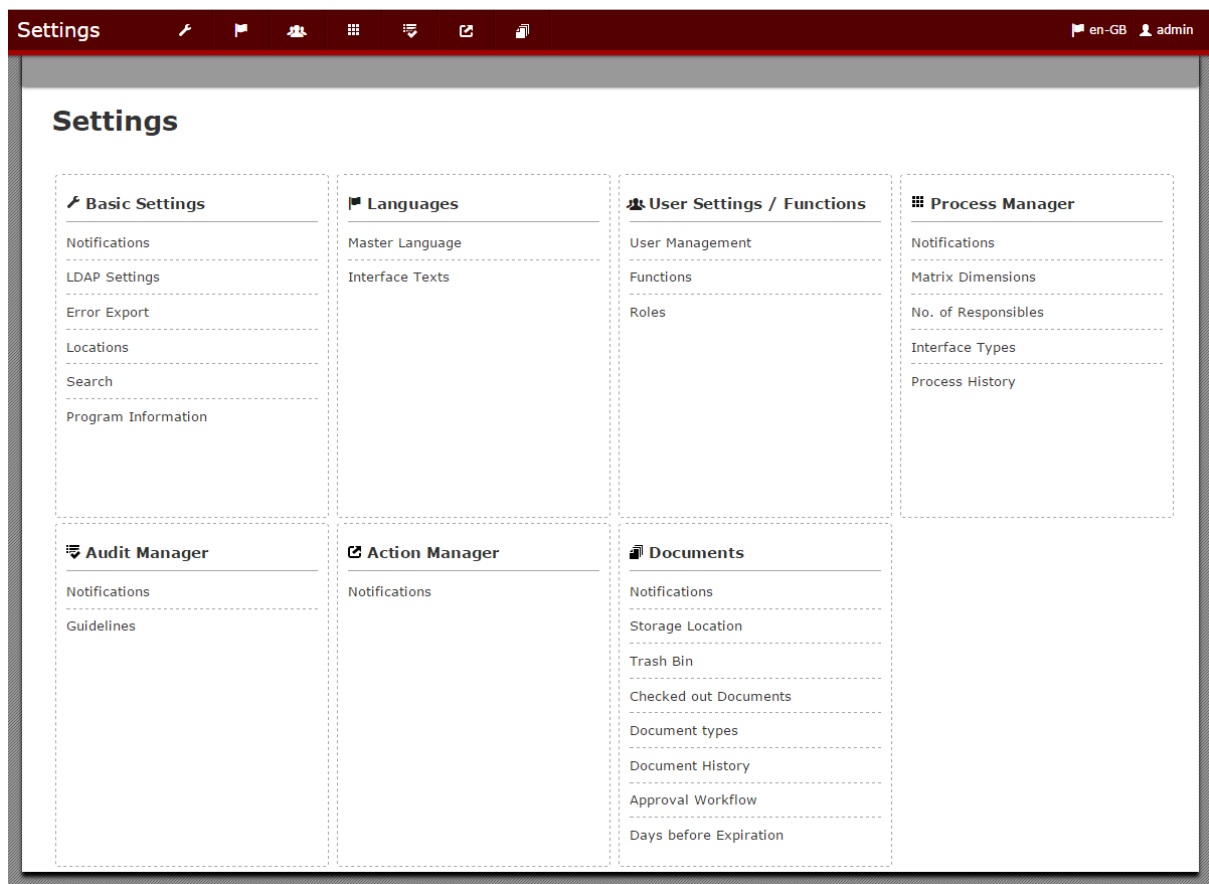➢ In terms of the server selection for the migration you have two options:
1. Migration would be carried out on WissIntra NG Server
2. In case if the first option is not possible then the Server on which the Migration would be carried out should have the same time as WissIntraNG Server. Here the different time zones and dates should be taken into consideration .If the date and time are not synchronized it may lead to errors in the migrated data.

➢ The Approval Workflow in WissIntra® NG must be disabled during the migration.
1. To do this start WissIntra® NG.

2. Click ![user icon] and navigate to *Administrator* ▶ *Settings*.
   The following overview opens:

3. Navigate to *Settings* ▶ *Documents* ▶ *Approval Workflow*.
   The following dialog window opens:

4. Select via the Drop-Down-Menu "No Approval Workflow".
5. Repeat this step if necessary for all further document types

 ➢ By clicking on [Save] you save the entry and can proceed editing the information.

6. When the changes are done, click on [Save & Close] to save the entry and close the dialog window.

4   Migration

➢ The following chapters describe the migration of data in following modules:

- General Data
- Process Manager
- Audit Manager
- Action Manager
- Document Manager

4.1   General Functions

➢ The following general data are automatically migrated to WissIntra® NG:

• Locations

• Users

• Functions

• Guidelines

• Tables

➢ The following general data are partly migrated to WissIntra® NG:

• Languages are migrated **if you possess the licenses for them**

• Roles: with **administration permissions** are migrated automatically, including checkboxes for auditor and release responsible

• Roles: all other roles without administration permissions are mirgrated **with reading permission** only

➢ The following general functions are not migrated to WissIntra® NG:

• The lexicon and the starting page is not migrated

• The start information page is not migrated

• The configurations of WiMCheck are not migrated and need to be reconfigured
  in the e-mail notifications of WissIntra® NG.

> **Note:**
> Note that WissIntra 6.3 provides a different color scheme for process cards than WissIntra® NG. Therefore ensure that the process card contain the correct color after migration or adapt the colors manually if needed.

> **Note:**
> Note that roles of auditor, release responsible and risk manager are not available in WissIntra® NG. You need to create the role of auditor yourself. The role of the release responsible can be created as soon as the release workflow is implemented.

> **Note:**
> Note that only the creator and date are migrated. If the process was changed in the meantime by another user, these entries will not be taken over by WissIntra® NG.

> **Note:**
> If the creator of a process, process step information etc. is deleted in the 6.3 version, the migrated database contains as creator "Mr. Dummy, Migration" in WissIntra® NG.

4.2 Process Manager

> 💡 **Note:**
> All data that are in the workflow process, will not be migrated to WissIntra® NG.

➢ The following data are automatically migrated to WissIntra® NG:

• Processes are migrated automatically and appear as process cards

• Persons responsible are migrated automatically

• Process information are attached as HTML data

• Process step characteristics appeaer in WissIntra® NG as descriptions

• Process step information appear in WissIntra® NG as instructions

• Forms / Checklists are migrated as instructions in WissIntra® NG

• Turtle views are migrated automatically

➢ The following data are not migrated automatically to WissIntra® NG:

• Locked processes are not migrated

• Adaptations for labeling the the process information and characteristics are not migrated

• Flowchart configurations for the third level are not migrated

• Process symbols, their names and translations are omitted in WissIntra® NG

• History entries are not migrated; the history will be newly created in WissIntra® NG after migration

> 💡 **Note:**
> Pictures in *.jpg format that werde attached in the process step information or process step characteristics are not migrated to WissIntra® NG.

> 💡 **Note:**
> Subsripted or superscripted characters in 6.3 are not migrated to WissIntra® NG, because the NG editor doesn't have this function.

4.3 Audit Manager

➢ The following functions are automatically migrated to WissIntra® NG:

• Audits and their content

• Criteria that are assigned by guidelines are automatically migrated to WissIntra® NG

Note:
Criteria that were assigned **manually**, are attached as HTML data in WissIntra® NG.

Note:
Criteria that were assigned **automatically**, are migrated to WissIntra® NG as audit criteria that can be edited as usual.

Note:
Guidelines that were manually inserted in the textfield of the audit criteria, are not migrated to WissIntra® NG except as HTML attachment of a manually inserted audit criterion. This would be a 1:1 copy of the original criterion.

Note:
In WissIntra 6.3 you can enter guidelines manually into the textfield. This option is not available in WissIntra® NG. Here, you can enter guidelines only with the corresponding button. Manual entries of 6.3 are not migrated to WissIntra® NG.

Note:
In WissIntra 6.3 the textfields of the audit criterion can be edited manually. This could lead to a discrepancy between this text and the guideline paragraph (and corresponding audit criterion).

Note:
In WissIntra 6.3 you can number the audit criteria serially. However, this is option is not available in WissIntra® NG. Here, the criteria contain their number automatically by the guideline.

Note:
All migrated audits are marked in WissIntra® NG with the ISO evaluation scheme. Since there are also VDA schemes exisitng, the scheme need to be adapted manually after migration in the settings. The evaluation schemes depend on the guidelines used.

Note:
Some terms change during migration from 6.3 to in WissIntra® NG.
Improvement potential becomes improvement suggestion.
Statement becomes note.
Deviation becomes main deviation.

N/A is omitted in WissIntra® NG.

Note:
The statement types are predefined in WissIntra® NG and are migrated as nearly to the original as possible from 6.3.
Only some terms can change, such as: The audit criterion evaluation "uw"dominantly effective in 6.3 becomes "tw" (partially effective) in WissIntra® NG.The audit criterion evaluation tw" (partially effective) in 6.3. remains "tw" (partially effective) in WissIntra® NG.

Note:
Personalized evaluation schemes from 6.3 are not migrated to WissIntra® NG.

4.4   Action Manager

➢ The following functions are migrated automatically to WissIntra® NG:

- Actions and their content

➢ The following functions are not migrated to WissIntra® NG:

- The content of the fields "functions" and "what" in the corrective/preventive actions are attached as HTML data
- The information for Actions that are "completed at" are attached as HTML data

Note:
C/P-Actions will be Tasks in WissIntra® NG.

➢ Following text fields are not available in the WissIntra® NG in the Action Manager Module:

- "Dispatched on"
- "Entered on"
- The marking of a statement as "public"
- "Responsible" and the information of "process with process step"
- "Who" (Function)
- "Deadline"
- "Extension 1"
- "Extension 2"

Note:
The information about deadline and extension are only visible if you activated them previously in the settings.

Note:
The main task of the action will always contain the category "correction" during migration. You can change this after migration in case of need.
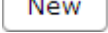

Note:
WissIntra® NG provides standard values for priorities of actions. If you changed the priorities manually in 6.3, these changes will not be migrated. WissIntra® NG uses standard values instead.

4.5   Document Manager

➢ Documents that are stored in the default and result document, will be migrated automatically to WissIntra® NG.

Definition:

Result document are those that were attached via button New . These documents can

be opened in WissIntra® NG. Documents, however, that werde attached by the symbol are only attached as links and cannot be opened in WissIntra® NG.

Please note:

- Documents cannot be edited using the file explorer any longer, but only with the WissIntra® Document Manager Module.
- All (standard and result) documents will be **listed** in the Document Manager.
- Documents with the same name that were stored in different directories before, will now be stored under the same name in the same directory. They can only be differentiated by their content.
- Restricted permissions that were organized by Windows functions, will be omitted during migration.
- Therefore, you should remove all documents that you don't want to publish from the directory **before migration**.
- Likewise, if you don't want to adopt documents into the Document Manger or if you like to keep your previous directory structure, you should remove those document from the standard and/or result directory and paste them back again after migration.

4.6   Risk Manager

There is no Risk Management Module implemented in WissIntra® NG for the time being.
Thus, the checkboxes of the Risk Management Module in WissIntra 6.3 are not migrated to WissIntra® NG.

> **Note:**
> Note that role of risk manager is not available in WissIntra® NG.

4.7   Release Workflow

> **Note:**
> Note that role of release responsible is not available in WissIntra® NG. The role of the release responsible can be created as soon as the release workflow is implemented.

5   Carry out Migration

If you have considered all above mentioned points carefully, you can carry out the migration.

➢ To do this, proceed as follows:

1. Start the migration tool.

➢ The first (red highlighted) part displays the data for the connection to the 6.3 database.

➢ The second (blue highlighted) part displays the log-in data for WissIntra® NG. (Default is admin/ admin)

> **Note:**
> The third (green highlighted) part describes the "Dummy User Mail". This is the e-mail address under which a dummy user is generated. This e-mail address must not be used with any other user in the WissIntra® 6.3 database. The dummy user is registered in cases when there are no users or invalid users are assigned.

2. Click on the "Start Migration" button.

> **Note:**
> If there are entries in the column "open errors" (pink highlighted part), contact the servicedesk of k+k information services GmbH.

3. Move to the next chapter.

6   After Migration

After migration of data from WissIntra® 6.3 to WissIntra® NG, a log file is created with all corrected errors that occured during the migration process.

> **Note:**
> You need a program to open *.XLSX files to read the log-file.

> The files are stored in the Logs folder.
> Work through all errors and correct them in case of need in WissIntra®.
> Moreover, you should check all data in WissIntra® NG.

> **Note:**
> Ensure to select the appropiate evaluation scheme for each guideline in WissIntra® NG.

> **Note:**
> Define the roles in WissIntra® NG.

> **Note:**
> Assign the roles to each user in WissIntra® NG.

> When you have migrated and **checked all migrated data**, proceed as follows:
1. Define the e-mail settings in WissIntra® NG to send e-mails from there in Administrator ▶ Settings ▶ Basic Settings ▶ E-Mail Notifications.
   > Now you can send / receive e-mails from WissIntra® NG.
2.   Open the Migration Tool.
   > The following surface is displayed:

3. Click on the button "Send Password E-mails".

 ➢ Now all WissIntra® NG users receive an e-mail with password and username.

6.1   The end

✱ We hope that you enjoy using WissIntra® NG successfully.