

Since there are many clients using the Help Desk 6.3 or 6.5 by Expinion.net we have developed the data migration tool (DMT) that will allow you to transfer data between the two solutions.

Notes:

- The contents of *custom fields* in your HelpDesk will *not* be transferred. The conversion *will include* agent, category, issue, client name/username/password/email address.
- Unlike HelpDesk, the HelpConnection.net solution has both first name and last name fields. Please note that the expected format will be *first name last name*. (The first word encountered in the client name field will be considered a *first* name, data found after a space will be considered a *last* name.)

## System Requirements

*Windows IIS Server:* HC is written in .NET (VB) 2.0. Therefore, you'll need a working Windows IIS server, which is setup to support ASP.NET. You will also require a SQL Server (MS SQL) database.

*Other:* Once the application is installed and online, you can use MS Internet Explorer, Netscape or Firefox to administer it.

## Installation

*After* you have installed and setup your HC.net solution, you may attempt to transfer some of the HD6 table content using this utility. The HC solution installation *must* be completed before beginning this process, and any data stored in the *new* HC installation will be overwritten (lost).

In other words, don't start to build up your HC knowledgebase or bother to setup agents & categories in this new HC installation, if you're going to transfer data from the HD anyway.

### 1. Create Folder

Please create a folder to house the DMT tool. (On a typical *local* server, this will be created as a sub-folder of the inetpub/wwwroot/DMT.)

Copy the contents of the unzipped DMT folder, into this newly created folder.

### 2. Set Permissions

Since this is a .NET application, you (or your web host) need to set the folder where the DMT resides as a *web application* and assign the typical permissions on the folder. This includes ASP.NET and IUSR accounts.

### 3. Modify Web.Config File

There are a couple of settings in the web.config file that you need to look at. The first is a key called LANGUAGE\_FOLDER\_PATH. This is pointer to the DMT language file, which is kept under *\_Language* folder. Make sure that the value is pointing to the *\_Language* folder, for example:

```
<add key="LANGUAGE_FOLDER_PATH" value="C:\inetpub\wwwroot\TransferTool\_Language\"/>
```

Make sure the last slash is also included in the path. Note that this is not a URL!

The second key value you should look at is the IGNORE\_INTEGRITY\_CHECK which should always be set to 0, when set to 1 the DMT will not check whether the data migrations have already been performed on the HC solution. Example:

```
<add key="IGNORE_INTEGRITY_CHECK" value="0"/>
```

#### 4. Save Web.Config and Upload

You're now finished with the web.config file. Save it, close your editor, and if you are using a remote server, upload the new file.

### Use of DMT

The application itself is quite easy to use and doesn't require your input other than in two steps.

1. Start your browser and open the DMT in it, example: <http://localhost/DMT/default.aspx>
2. Read the text and press the **Next Step** button.
3. Now you are asked to enter two connection strings, the first one (Old HelpDesk DB Connection) is the connection string as defined under config.asp in your Expinion HD installation. Example of connection string one:

```
Provider=sqloledb;Network Library=DBMSSOCN;Data Source=SQL.SERVER.COM,1433;Initial Catalog=CATALOG;User ID=USERNAME;Password=PASSWORD;
```

Now press the first **Test** button to verify the connection is working. Watch for any error messages which will appear if the connection is not working as expected.

4. Now do the same for the second connection string (New HelpConnection.NET DB). However, *here* you will use the connection string as defined in the web.config file. The example connection can be found in the *actual HC solution*, web.config file. It will *not* be found in the file within the DMT folder. Example from wwwroot/hc/web.config.

It will look similar to the lines below.

```
Provider=sqloledb;Network Library=DBMSSOCN;Data Source=127.0.0.1,1433;Initial Catalog=HC_Solution;User ID=sa;Password=password;
```

Now press the second **Test** button to verify the connection is working. Watch for any error messages that would indicate that the connection is not working as expected.

5. Now that both connection strings are entered and verified press the **Next Step** button. On the following screen you are presented with an overview of how many items are available for migration and 3 options on what issues/tickets will be migrated.

You can elect to transfer data from either *all issues*, only *public issues*, or *no issues* at all. Select the option you want and press the **Next Step**.

Note that depending on the amount of data being migrated, the process may take a few minutes to complete. During this time do not stop the application or interrupt its process. If you do so, the data might become corrupted in your HC solution.

Once the migration has completed you will be presented with the results. Keep in mind that since the two solutions are very different the migration is not an exact science and there might be a problem with the data integrity. We have taken every precaution possible to migrate as much of the data as possible and as precisely as possible

The DMT tool is not part of the HC Solution and is not supported by HelpConnection.NET or Expinion.net Use at your own risk. This tool has been tested and verified by HC.NET staff on our *own* servers. Unfortunately, this does not guarantee that it will work for *every* scenario. Please be sure to keep your old HD tables until you verify that you have all necessary data from them.