

Peregrine

KBMigrate for Get-Answers 4.1

KBMigrate Guide

For Windows

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KBMigrate Utility

KBMigrate is a utility that migrates your Knowlix-created knowledgebases to a format suitable for import by Get-Answers. KBMigrate provides quick and easy migration of your data using a simple Wizard style application.

The KBMigrate utility supports Knowlix and Get-Answers! 1.3-2.0 data that uses Knowlix NFO formats. The standard Get-Answers external data import functionality migrates DocumentCollections.

Topics in this section include:

- *Using the KBMigrate utility* on page 6
- *Installing KBMigrate* on page 8
- *Preparing to migrate to Get-Answers* on page 9
- *Running the KBMigrate utility* on page 12
- *KBMigrate Results* on page 18

Using the KBMigrate utility

The KBMigrate utility does not modify your original Knowlix data. You can run it as often as necessary until you have no errors.

Knowledgebase formats

The KBMigrate utility migrates Knowlix-created knowledgebases. These knowledgebases contain documents that KnowlixAuthor or KnowlixFrontline can view and edit. Knowledgebases that do not export properly are those that KnowlixAuthor and KnowlixFrontline can view but not edit.

For Get.Answers! 1.3-2.0 users, KBMigrate does not migrate DocumentCollections. DocumentCollections are NFO files containing native documents such as MS Word, and Adobe PDF files. The original documents used to create your DocumentCollections can be migrated to Get-Answers. Refer to the section in the Get-Answers documentation on importing native documents.

KBMigrate can migrate:

- Knowlix-created knowledgebases that have forms and stylesheets

KBMigrate cannot migrate:

- Get.Answers! 1.3-2.0 DocumentCollections
 - Knowlix-created knowledgebases that do not have forms and stylesheets
-

Export types

When you create a document in KnowlixAuthor, your data merges with the stylesheet to create the completed document. KBMigrate separates your data from the applied stylesheet and exports the data only as an XML document. All markup and links applied to the data itself are migrated as well.

This means that a **Solution** field with an embedded image, a jump link, a pop-up, font changes, and color changes are migrated completely and look the same in Get-Answers. Stylesheets are not migrated as in Get-Answers; the concept of a merged record with stylesheet is superseded with the ability to store the data separately from the stylesheet. In Get-Answers, this allows you to have multiple stylesheets for the same record, allowing you to determine by role who can see what part of the data or to change the way the data is presented by role.

You can export the following:

Export type	Description
Named pop-ups	Converted to HTML and linked to the migrated document as an attachment, stored in Get-Answers as Shared attachments .
Document pop-ups	Converted to HTML, given a unique filename, linked to the migrated document as an attachment, stored in Get-Answers as Owned attachments .
Images	WMF and BMP images are converted to JPEG format for web rendering; all other images (JPG, GIF, and so on) are exported in their original format, linked as images in the migrated document, and stored in Get-Answers as Shared attachments .
Attachments	Exported in their original format, linked to the migrated document as an attachment, and stored in Get-Answers as Shared attachments . When served on the web, if the browser supports a plug-in capable of viewing the attachment (for example, MS Word or PDF attachments), the browser opens the attachment in the appropriate viewer (plug-in). In the case of EXE or DLL attachments, or any other attachment for which the browser does not have an associated plug-in, the browser prompts the user to save or open the file from its current location. The user needs the required viewer on the client machine to view the attachment.

Export type	Description
Web links	Migrated as a normal href link to the specified URL address, stored in the data of the field where originally located in the migrated document.
Jump links	Migrated as href links to their original destination document. Only valid jump links are migrated (See <i>BadJumps.log</i> on page 18). KBMigrate locates the destination document and gathers enough information to create the link. KBMigrate does not migrate the destination document at this time. The link is not valid in Get-Answers until the knowledgebase containing the destination document is migrated and imported.
Jump destinations	The jump destination name is stored in the migrated document as an anchor and is referenced by the jump link.

You cannot export the following:

Export type	Description
Jump destinations list	The list of defined jump destinations is not preserved.
Program links	Program links are not supported in web browsers and therefore not migrated.

Installing KBMigrate

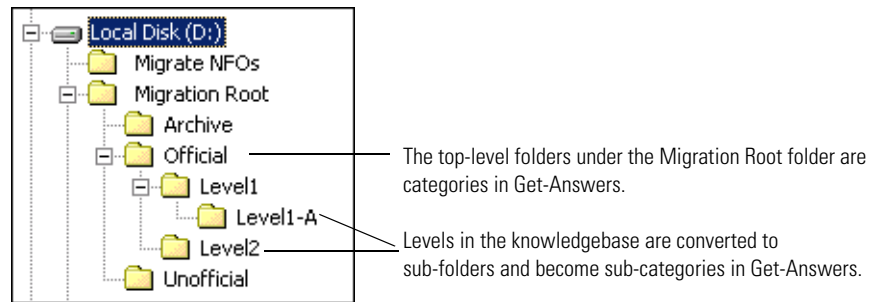
KBMigrate is distributed on its own CD. The installation is a simple process. Since KBMigrate is built with Knowlix technology, you must install KBMigrate on a machine where KnowlixAuthor resides. Follow the prompts in the installation wizard and install KBMigrate to the Knowlix folder.

Preparing to migrate to Get-Answers

After installing KBMigrate, you need to prepare for a successful migration to Get-Answers.

To prepare to migrate to Get-Answers:

- 1 Identify the knowledgebases you want to migrate to Get-Answers, making a list or directory of them.
- 2 Create a folder on the system where KBMigrate is installed; for example, Migration Root.



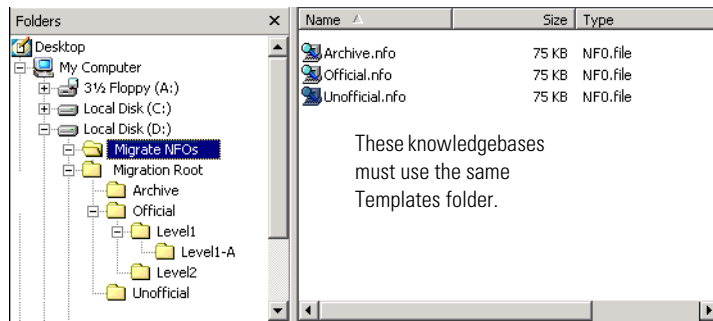
The folder name is important. When importing the new Knowlix XML documents to Get-Answers, this is the folder that you use for the migration root folder. When you run KBMigrate, you are prompted to name a folder to output the XML files to (step 4 on page 14). You must create sub-folders beneath this top-level folder for each knowledgebase you migrate. When importing to Get-Answers, the top-level folders under this **Migration Root** folder become categories. Levels within a knowledgebase are converted to sub-folders and become sub-categories in Get-Answers, as shown in the previous example.

- 3 Create a second folder at the same level as your migration root; for example, Migrate NFOs.

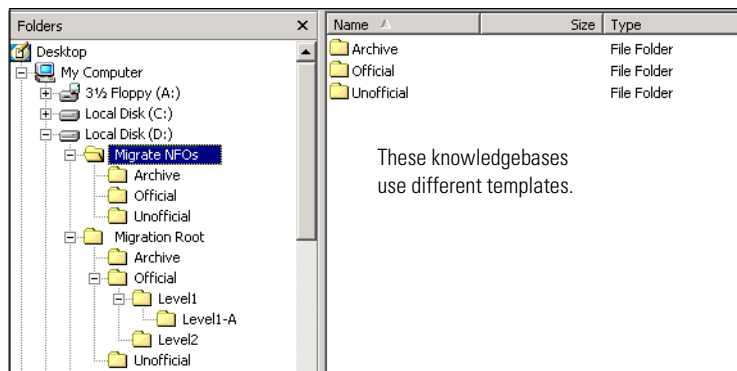
The top-level folder stores the knowledgebases that you migrate.

Note: While KBMigrate does not change your knowledgebases, Peregrine Systems recommends that you use copies of the knowledgebases for migration. Using copies eliminates the possibility of a user modifying the knowledgebase during migration.

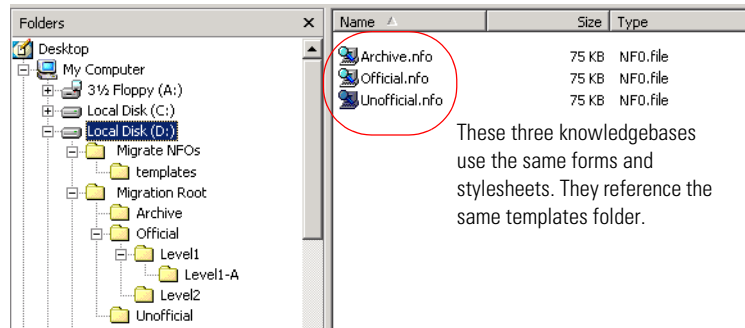
- If all of the knowledgebases that you plan to migrate share the same forms and stylesheets, you can copy all the NFO files to same folder; for example, **Migrate NFOs**.



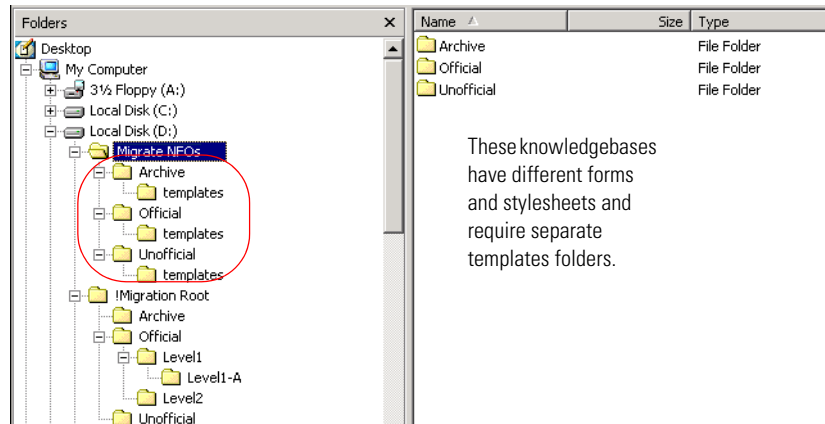
- If you have knowledgebases that use different forms and stylesheets, create a sub-folder for each knowledgebase and then copy the NFO files to their respective folders.



- 4 Copy the appropriate Templates folder to the same folder where you copied the respective knowledgebase.



The location of the Templates folder varies if you use more than one working directory in KnowlixAuthor. The Templates folder contains the forms and stylesheets used when adding and modifying documents in KnowlixAuthor. In the following example, you must run the KBMigrate utility three times, once for each knowledgebase.



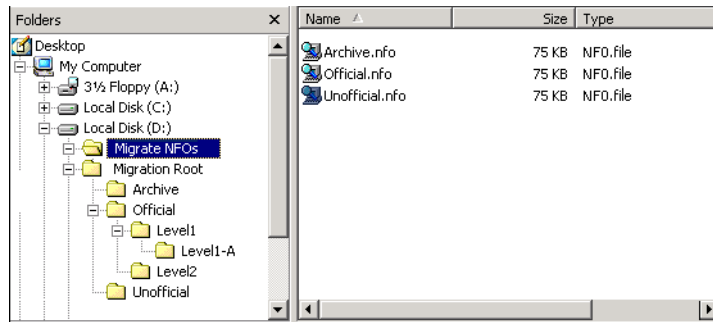
After identifying the knowledgebases and creating the folders, you are ready to run KBMigrate.

Running the KBMigrate utility

The KBMigrate utility wizard prompts you for the folders you created in *Preparing to migrate to Get-Answers* on page 9.

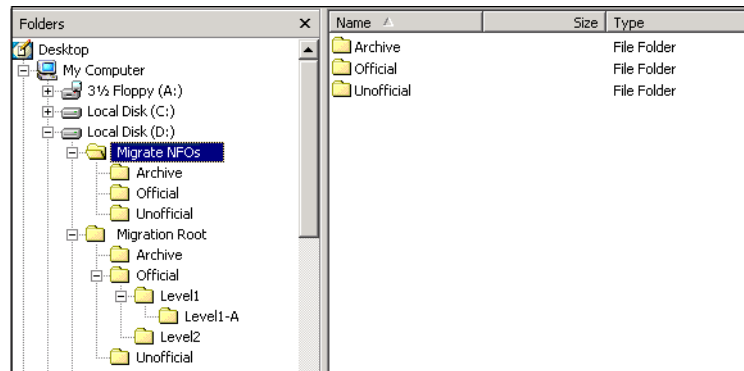
To run the KBMigrate utility:

- 1 Prior to running the utility, set the working directory in KnowlixAuthor to the new folder you previously created.
 - If all of your knowledgebases use the same forms and stylesheets, point the working directory to the folder above the **Templates** folder because KnowlixAuthor expects the templates folder to be a sub-folder of the working directory. In this example, point the KnowlixAuthor working directory to **D:\Migrate NFOs**.



- If your knowledgebases use different forms and stylesheets from each other, point the KnowlixAuthor working directory to each knowledgebase folder one at a time. KBMigrate uses the KnowlixAuthor working directory to locate the forms and stylesheets.

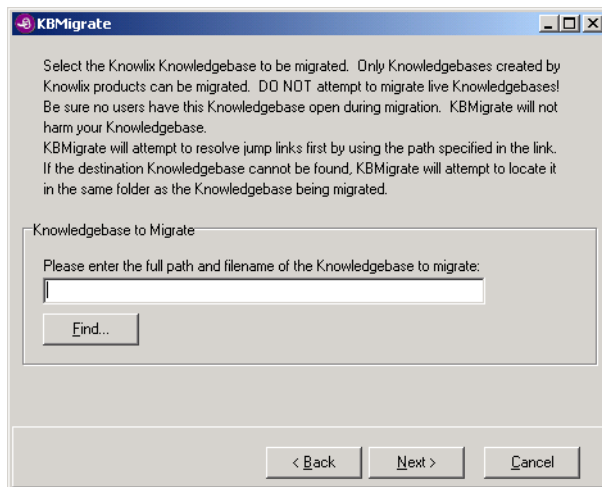
In this example, you must set the working directory three times, one for each knowledgebase. Open KnowlixAuthor and set the working directory to `D:\Migrate NFOs\Archive`, then run KBMigrate on the `Archive.nfo`. Next, reopen KnowlixAuthor, reset the working directory to `D:\Migrate NFOs\Official`, and run KBMigrate on the `Official.nfo`. Then, reopen KnowlixAuthor, reset the working directory to `D:\Migrate NFOs\Unofficial`, and run KBMigrate on the `Unofficial.nfo`.



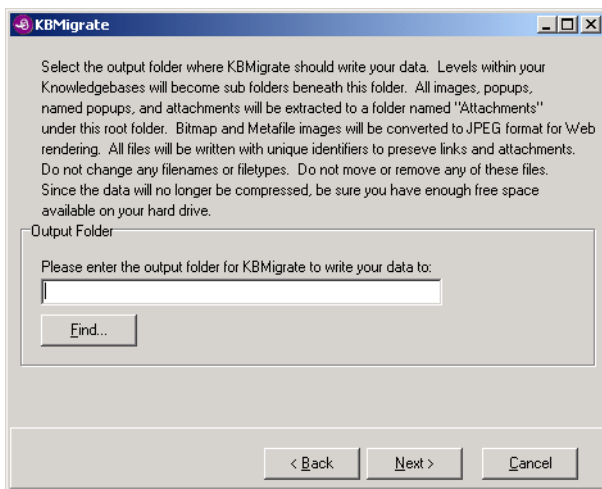
- 2 Navigate from your Start menu to the Knowlix folder and select KBMigrate to open the first wizard screen.



- 3 Read the information on the screen, then click Next.



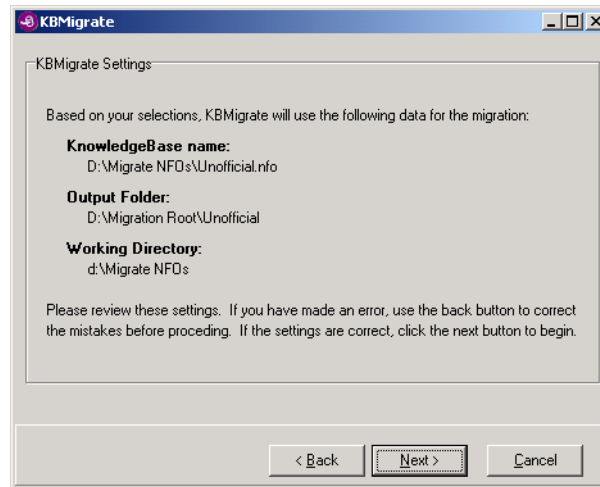
- 4 Using the Find button, navigate to the copy of the knowledgebase you plan to migrate (for example, D:\Migrate NFOs\Unofficial.Nfo), then click Next. You are prompted for the output folder; for example, D:\Migration Root.



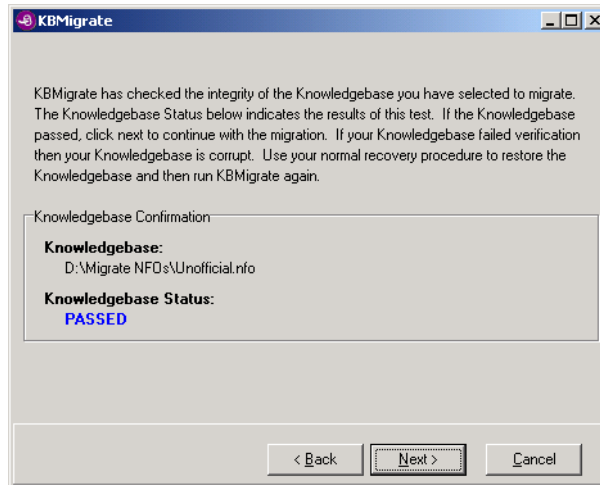
- 5 Using Find to locate the top-level folder you created in *Preparing to migrate to Get-Answers* step 2 on page 9, create a new sub-folder, then click Next. For example, Unofficial.

Note: This folder becomes a Category in Get-Answers. If you want to import this information to an existing Category in Get-Answers, use the existing Category's name for the folder name. If the folder does not exist, one is created for you.

The next screen summarizes your settings.



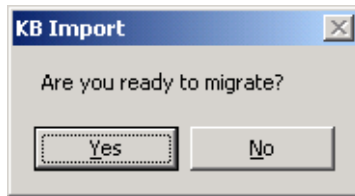
6 Review the settings.



- If the settings are correct, click **Next**.
- If the settings are incorrect, click **Back** and make the necessary changes.

KBMigrate verifies the integrity of the knowledgebase prior to migration. This screen may take a few seconds to open.

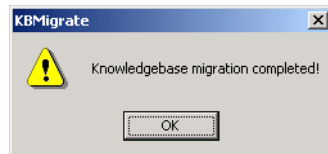
- 7 Complete one of the following:
 - a If the knowledgebase fails verification, use your normal knowledgebase recovery routine and try again.
 - b If the knowledgebase passes verification, click Next.
- 8 Click Yes.



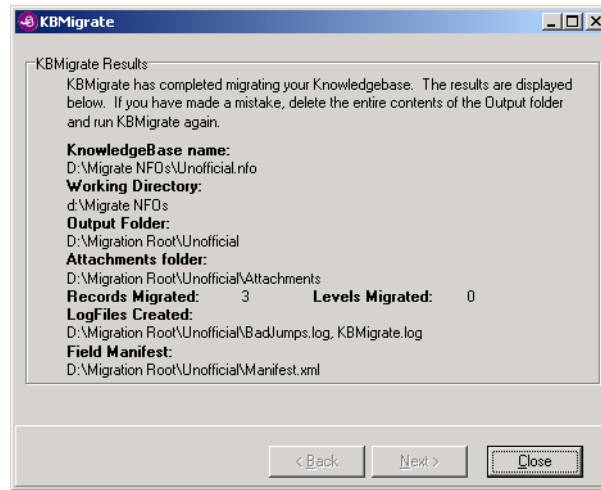
Migration can take several minutes to several hours, depending on the size of the knowledgebase.

Note: This process is CPU intensive. Close all other applications that are running.

Once complete, an audible alert accompanies the message that the migration is complete.



- 9 Click OK to open a screen containing the migration results.



This information is also stored in the KBMigrate.log file that is written to the output folder; for example, D:\Migration Root\KBMigrate.log.

- 10 Click Close.
- 11 Open BadJumps.log.
 - a Make necessary corrections in KnowlixAuthor.
 - b Re-run KBMigrate (go to step 2 on page 13).

You must run the KBMigrate utility for each knowledgebase.

Important: Change the working directory in KnowlixAuthor prior to running the utility.

KBMigrate Results

When migrations are successful, your output folder (for example, D:\Migration Root) contains the following:

- Manifest.xml
- BadJumps.log
- KBMigrate.log
- Attachments folder
- XML files
 - If no levels are in the knowledgebase, there is one XML document for every document in the knowledgebase.
 - If levels are in the knowledgebase, you have sub-folders that parallel the levels in the knowledgebase. Your XML documents are stored in the appropriate sub-folder.

Manifest.xml

Manifest.xml contains an XML structure with an entity for every unique field found in your knowledgebase. Each entity has a number associated with it. This number is the character length of the longest occurrence of this field in this knowledgebase. The **Import to Get-Answers** process requires the data in this file.

BadJumps.log

BadJumps.log lists the unresolved jump links. When KBMigrate finds a jump link, it attempts to locate the destination document by following the jump link's path information. If the link fails, KBMigrate verifies the current working directory. If the link still does not resolve, enough information is stored in the **BadJumps.log** for you to correct the jump link in KnowlixAuthor. When you correct a jump link, you must delete the data stored in the output folder and re-run KBMigrate on the knowledgebase to correct the link in the XML output. Errant links are not written to the XML files; they are logged and ignored.

KBMigrate.log

KBMigrate.log stores the information shown in the final screen of KBMigrate as a log file for future reference. Refer to this file when you import your data to Get-Answers. This allows you to compare log files to verify a successful import.

Note: The numbers for **Records** and **Levels** do NOT match the number of records shown by KnowlixAuthor. This is because a **Level** in KnowlixAuthor is a record with a **Level** style applied to it. During migration, a folder is created to replace this level record and no document is created for it. However, it is counted as a **Level** in the log. The sum of **Records** and **Levels** should match the number of records shown in KnowlixAuthor.

Attachments folder

The attachments folder contains all images and attachments used in the knowledgebase. Bitmap and Window's metafile images are automatically converted to JPEG format for proper web-rendering in Get-Answers.

In Knowlix, images and attachments are stored as objects and then linked to the document. If you delete a document with an attachment or image, the document is deleted but the linked objects are not. KBMigrate exports all of your attachments and image objects, regardless of whether they are currently linked or not. You can delete unused objects once imported to Get-Answers.

The attachments folder can also contain HTML files. HTML files are created for Named and Regular pop-ups.

Warning: Do not change the filename or extension of any file! If you need to make a change, do so with KnowlixAuthor and re-migrate the knowledgebase with KBMigrate. All filenames in the attachments folder are prefixed with the NFOID of the knowledgebase they were extracted from to maintain scope when imported to Get-Answers.

It is possible to have more than one knowledgebase with `Image1.jpg` as an attachment and this image may not be the same for each knowledgebase.

XML files

The XML files contain the field level data from your knowledgebase. Besides the fields you normally see for a particular document type, you may notice additional fields have been added. These fields contain **Other** information stored in Knowlix for this document, such as the history and checklist information. Do not modify the structure and content of this XML file. This file structure provides trouble-free importing to Get-Answers. For more information on this file structure, refer to the *Get-Answers Admin Guide*.



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