

## **Perinorm DVD : Migrating settings**

Users of the current Perinorm version can use a special program - the "Perinorm Migration Tool" - to save their customer data and personal settings as an XML-file which can be imported to the new Perinorm version.

This is a two-step process:

1. Generate the XML-file containing all customer data and personal settings
2. Import the file to the new Perinorm

The following information can be imported:

- Bookmarks
- Notes
- Profiles
- Company standards
- Full-text documents(offline)
- Saved export settings
- Saved search queries
- Search masks

### **1 Migrating settings for a single-user Perinorm DVD**

#### **1.1 Download the "Perinorm Migration Tool"**

Go to the following link to download and save the "Perinorm Migration Tool".

(Please note: This is a zipped file.)

<http://perinorm-proto.c-content.nl/perinorm5/downloads/PerinormMigrationTool.zip>

or start the tool directly from your Perinorm directory on your hard disk.

#### **1.2 Unzip and copy the file "PerinormMigration.exe"**

The Perinorm Migration Tool does not have to be installed and can be opened from any directory.

However, it is recommended that the tool be saved in the directory which contains the "Perinorm.exe" file. With standard settings this will generally be the directory:

**C:\perinorm\**  
Perinorm Migration Tool V.0.7

### 1.3 Save settings files in one directory (optional)

The search masks, saved search queries and export settings are saved in separate files which may be stored in separate directories. However, the Perinorm Migration Tool can only read the files from one directory.

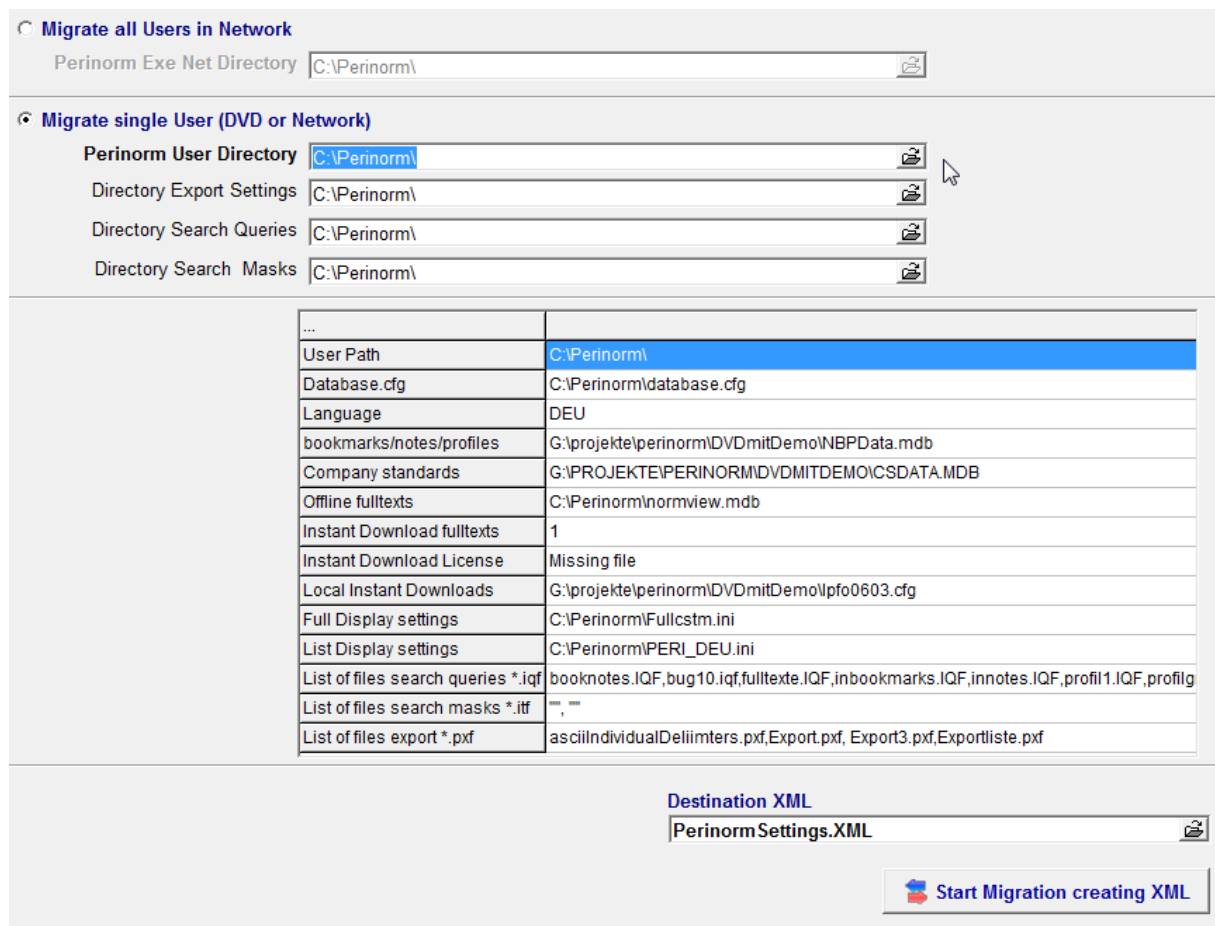
It is therefore recommended that all setting files that are to be migrated be copied into one directory. These setting files can be identified as follows:

- Search masks are files with the extension **.itf**
- Saved queries are files with the extension **.iqf**
- Export settings are files with the extension **.pxt**

### 1.4 Start the Perinorm Migration Tool

To start the Perinorm Migration Tool use the Windows Explorer to open the directory in which it has been saved (see 1.2), for example "C:\perinorm\". Double click on the file "PerinormMigrationTool.exe" with the icon ((ICON)).

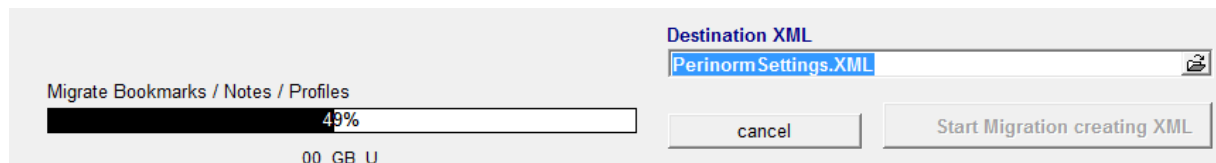
The program starts with the following window:



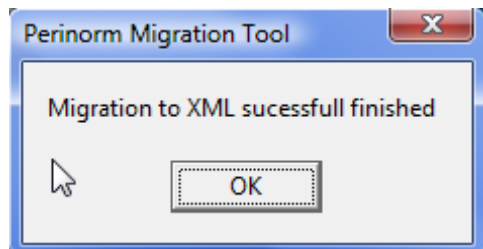
### 1.5 Starting the tool from a Perinorm directory (quick start)

If the Perinorm Migration Tool has been saved in a Perinorm directory, a table will show the most important settings (see above screenshot).

If this is the case, you only need to click the button "Start migration creating XML" to start the migration by converting your settings files to XML.



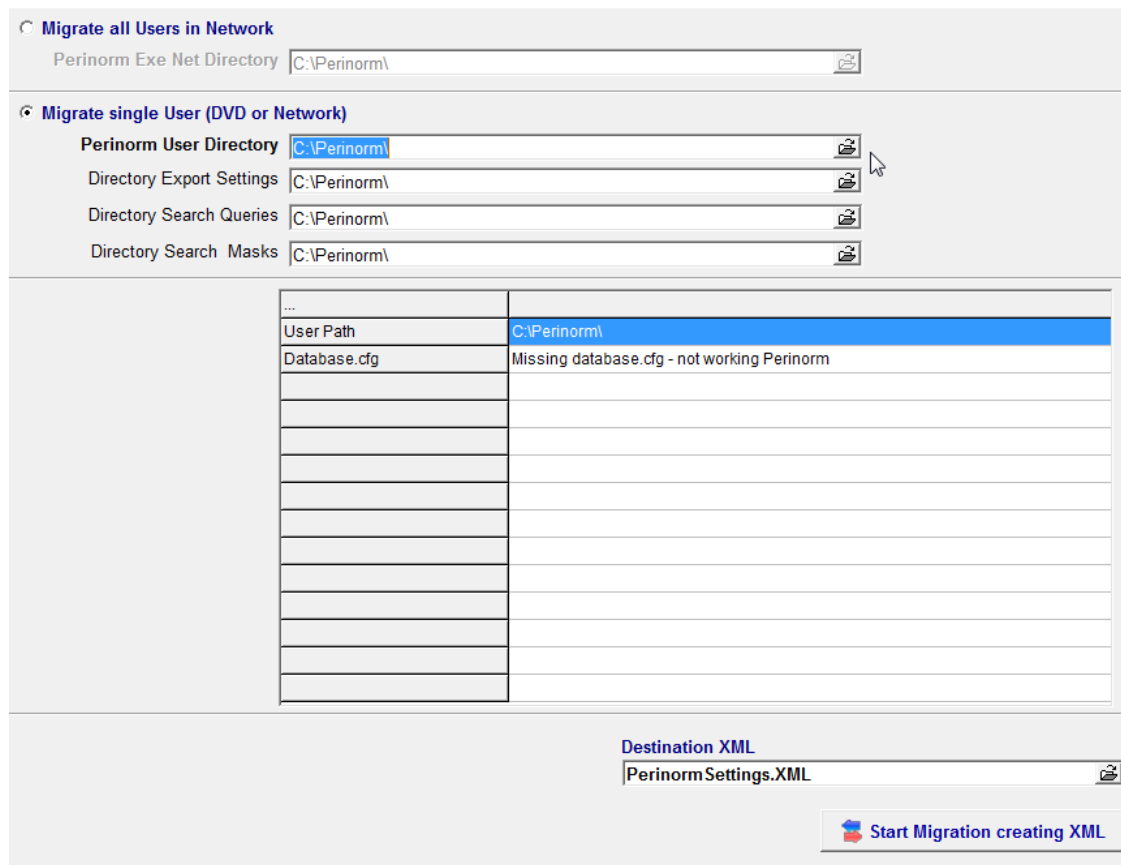
A message appears telling you the conversion has been completed.



### 1.6 Starting the tool from another directory

If your Perinorm program is saved in another directory, the table will not contain the settings as shown above, but will give the following message:

**"Missing database cfg – not working Perinorm".**



In this case click on the button to the right of the field "**Perinorm User Directory**" to select the directory in which you have installed Perinorm.

Once you have selected the relevant directory, the most important settings will be shown in the table and you can continue by clicking the button "Start Migration creating XML", as described in 1.5.

## **1.7 Result of conversion**

Once the conversion has been completed, the start directory of the Perinorm Migration Tool will show a new file "PerinormSettings.XML", which contains all the user settings files which have been converted to XML.

This file can then be imported to your new Perinorm version and you can continue to work with your own customer data and settings.

## **1.8 Optional settings**

### **1.8.1 Directory Export Settings**

If you have saved your export settings in your own directory, you can enter this directory in the "Directory Export Settings" field (see screenshot above) and all of your export setting files (those ending with ".pxf") will be converted and copied into this directory.

### **1.8.2 Directory Search Queries**

If you have saved all your search queries in your own directory, you can enter this directory in the "Directory Search Queries " field (see screenshot above) and all of your search query files (those ending with ".iqf") will be converted and copied into this directory.

### **1.8.3 Directory Search Masks**

If you have saved all your search masks in your own directory, you can enter this directory in the "Directory Search Masks" field (see screenshot above) and all of your search mask files (those ending with ".itf") will be converted and copied into this directory.

### 1.8.4 Optional destination for XML files

If you want to choose the directory and field in which your settings are to be saved, enter these in the field "Destination XML".

## 1.9 Single users within a network installation

Each user in a network installation can save their customer data and user settings as an XML file by entering their personal user directory in the **"Perinorm User Directory"** field.

## 2 Migrating settings for all users in a network environment

**Please note:** This function is at present not available.

### 2.1 Click on option "Migrate all Users in Network"

The following window appears:

Property	Value
...	
Userbase.txt	C:\Perinorm\userbase.txt
Path to Users	G:\PeriNet2\clients\
List of users	1LANRTES,test,Thomas
NBP bookmarks/notes/profiles	
NBP one nbp file for all	yes
NBP filename	G:\projekte\perinorm\DVDmitDemo\NBPDData.mdb
NBP write permission for everyone	yes
CS Company Standards	
CS one csdata file for all	no
Instant downloads	yes
Instant Downloads Active	yes
Instant Download File	G:\perinorm\Export.cfg

**Migrate single User (DVD or Network)**

Perinorm User Directory: C:\Perinorm\

Directory Export Settings: C:\Perinorm\

Directory Search Queries: C:\Perinorm\

Directory Search Masks: C:\Perinorm\

**Destination XML**  
PerinormSettings.XML

**Start Migration creating XML**

## 2.2 Select network directory

Your network installation directory which contains the "perinorm.exe" and "userbase.txt" files should be shown in the "Perinorm Exe Net Directory" field. If not, enter your directory or use the browse button to select the appropriate directory.

As soon as the correct directory has been selected, the most important settings will be listed in a table.

## 2.3 Start conversion to XML

Use the button "Start Migration creating XML" at the bottom right to convert customer data and personal settings for all of the network users into an XML file, which will have the name "PerinormSettings.XML".

### 2.3.1 Optional destination for XML files

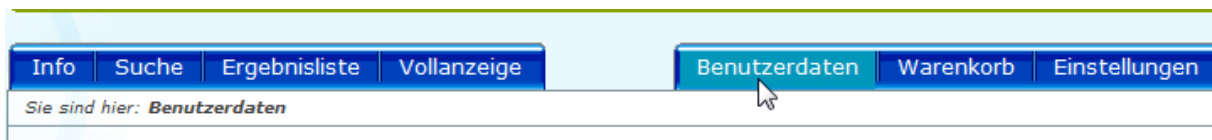
The directory in which the XML file is placed and the file name are given in the field "Destination XML". Use this field to select your own destination and file name, if you wish.

## 3 Importing the XML settings file to the new Perinorm version

**Please note:** At present migration data can only be imported by Perinorm DVD single users or single users within a network (but not for all network users simultaneously).

**WARNING! Importing this new data will delete all current settings in the new Perinorm version!**

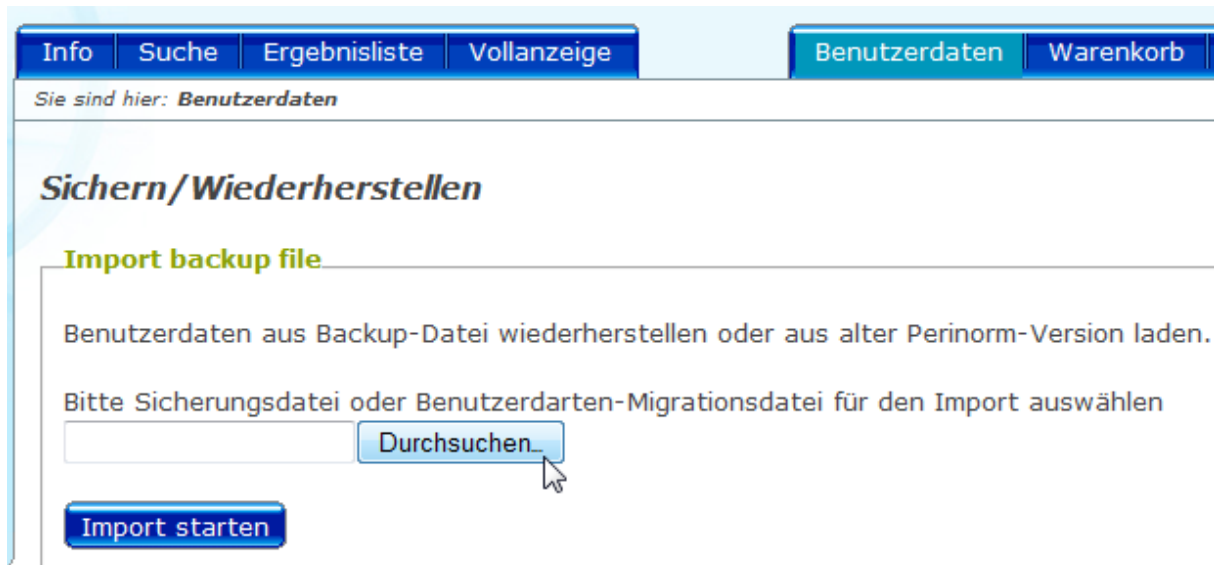
1. Log on to Perinorm and click the tab "**Customer data**":



2. In the menu on the left-hand side click on "**Backup/Restore**":



3. Click on "**Browse**" and select the XML file you have created using the Perinorm Migration Tool.



The screenshot shows a web interface with a navigation bar at the top containing 'Info', 'Suche', 'Ergebnisliste', 'Vollanzeige', 'Benutzerdaten', and 'Warenkorb'. Below the navigation bar, the breadcrumb 'Sie sind hier: Benutzerdaten' is visible. The main content area is titled 'Sichern/Wiederherstellen' and features a section for 'Import backup file'. This section contains the text: 'Benutzerdaten aus Backup-Datei wiederherstellen oder aus alter Perinorm-Version laden. Bitte Sicherungsdatei oder Benutzerdaten-Migrationsdatei für den Import auswählen'. There is an empty text input field followed by a 'Durchsuchen...' button with a mouse cursor pointing to it. Below this is an 'Import starten' button.

4. Import the file by clicking on "**Start import**". Your file (which at the moment is limited to 20 MB) will be imported to your server. This procedure may take a while.