

# iMIS Migrate

## BEFORE YOU BEGIN

For a quick helpful overview of iMIS Migrate, watch the following 9:30 minute video: [iMIS Migrate Overview](#)

## ABOUT IMIS MIGRATE

iMIS Migrate is a cloud-based tool for managing iMIS data migrations and site updates. iMIS Migrate allows users to create multiple stored projects that are shared between users, so the same data migration can be performed for multiple systems; for example, if there are queries you import for every client you implement, you would use the same stored project, so there is no need to duplicate efforts or work.

iMIS Migrate is a tool that runs in the background. You can close the tool and come back later to it to confirm the migration is still in progress. If a website goes down in the middle of a migration, the migration will pause and then resume when the site is back up.

**Note:** Migrating from iMIS 2017 to iMIS EMS is not supported. Migrating from EMS to iMIS 100 and vice versa is not supported.

With iMIS Migrate, you can migrate the following:

- Alert Sets
- Business Objects
- Content and Content Layouts
- Documents

**Note:** Represents anything in the Document System, excluding Communication Templates.

- Panel Data Sources
- Panel Definitions
- Process Automation Tasks
- Shortcuts
- Websites, including navigation and content
- Website Templates

The following items cannot currently be migrated with iMIS Migrate:

- Communication templates
- Products
- Website themes
- Shortcuts to business objects

- Redirect rules
- Access Settings

## DATA MIGRATION SERVICE GLOSSARY

- **Source System** – The system that contains the data of interest.
- **Target System** – The system the data is migrating to.
- **Projects** – Projects are where you define the data that is being migrated from the source system to the target system. All projects are shared, meaning they are accessible to anyone who has access to the DMS and are intended to be used for various migrations to multiple systems.
- **Project list** – A list of existing shared projects.
- **Job output** – A running log of the migrations in progress or completed. This log details the project name, migration submitter, submitted on time/date, completed on time/date, and status. The Job output can be found in the left navigation in iMIS Migrate.

## UNDERSTANDING THE DIFFERENT DATA SOURCES

Each data source has unique details that should be reviewed before a data migration.

### ALERT SETS

The **Alert Sets** data source migrates custom alert sets, including new alert sets and updates to existing alert sets. This data source does not migrate the alert tasks or the images in the alert set. To migrate alert tasks or images, you must choose the **Process Automation Tasks** data source.

### BUSINESS OBJECTS

The **Business Objects** data source migrates custom business objects and does not support migrating an Is-System business object.

Known limitations with **Business Objects**:

- Migrating shortcuts to business objects is not supported.
- After a business object is migrated, it must be manually published.
- After the initial migration, changes to a business object in the source system are not migrated to the target system. Any changes to a business object in the source system after the initial migration must be manually replicated in the target system or the business object must be deleted in the target system and remigrated from the source system.

### CONTENT

The **Content** data source migrates the following:

- Custom content records and folders located in Page Builder.
- Website templates (in the **RiSE > Theme Builder > Website templates** folder).

All content must be published before migrating. If the content is unpublished or in a working state, the content will not migrate to the target system.

Known limitations with **Content**:

- Website themes cannot be migrated.
- After a migration, all content must be published in the target system.
- Access Settings are not migrated. After migration, all content is set to the **Everyone Read** security set. Access Settings must be manually recreated in the target system.
- Redirect rules are not migrated. Redirect rules must be manually recreated in the target system.

## DOCUMENTS

The **Documents** data source migrates anything in the Document System, excluding Communication Templates and Is-System content. The **Documents** data source is not limited to, but includes the following:

- Queries
- Websites:
  - Location: `$/ContentManagement/DefaultSystem/Websites`
  - Folders containing multiple websites may be migrated.
  - Migrating a website also migrates the associated navigation/sitemap and content folder. After migrating, the website and content must be manually published in the target system.
- Images
  - Location: `$/images`
- Videos
- PDF and Word documents
- RDLs
- Report Writer reports
  - Location: `$/Common/Report Writer/Reports`
- Content layouts:
  - Location: `$/ContentManagement/DefaultSystem/ContentLayouts`

Known limitations with **Documents**:

- Communication Templates cannot be migrated.
- After the initial migration, changes to a query in the source system are not migrated to the target system. Any changes to a query in the source system after the initial migration must be manually

replicated in the target system or the query must be deleted in the target system and remigrated from the source system.

- After the initial migration, changes to a document's Access Settings in the source system are not migrated to the target system. Any changes to a document's Access Settings in the source system after the initial migration must be manually replicated in the target system or the document must be deleted in the target system and remigrated from the source system.

## PANEL DATA SOURCES

The **Panel Data Sources** data source migrates custom panel data sources and does not migrate Is-System panel data sources. When **Include Data** is enabled, any data associated with the panel data source is also migrated.

iMIS Panel Data Sources		
Name iMIS Panels		
Selected	Include Data	Name
<input type="checkbox"/>	<input type="checkbox"/>	AccountAlerts
<input type="checkbox"/>	<input type="checkbox"/>	ClubProperties
<input type="checkbox"/>	<input type="checkbox"/>	ContactDocuments

When migrating other data sources that use panel data sources, such as panel definitions or queries, it is recommended to include the panel data sources, panel definitions, and queries in the same project, so that every required element migrates together.

## PANEL DEFINITIONS

The **Panel Definitions** data source migrates custom panel definitions and does not migrate out-of-the-box panels.

Migrating a panel definition does not automatically migrate associated content records. It is recommended to include the content records in the same migration project as the panel definitions.

## PROCESS AUTOMATION TASKS

The **Process Automation Tasks** data source migrates custom process automation tasks and does not support migrating out-of-the-box process automation tasks.

Migrating a process automation task does not automatically migrate queries associated with the task in the **Conditions** or **Data Sources** tab. It is recommended to include the queries in the same migration project as the process automation tasks, so that every required element migrates together.

Known limitations with **Process Automation Tasks**:

- Communication templates are not migrated. Any communication template included in a process automation task must be manually recreated in the target system.

## SHORTCUTS

The **Shortcuts** data source migrates custom shortcuts and does not support migrating out-of-the-box shortcuts. If the migrated shortcut is associated with a document that does not exist in the target system, the document is automatically migrated with the shortcut.

Known limitations with shortcuts:

- Only new shortcuts are migrated; updating an existing shortcut is not supported.
- Migrating shortcuts more than once causes duplicates.
- Migrating a shortcut for a business objects is not supported.

## CREATING A STORED PROJECT

Do the following to create a new project:

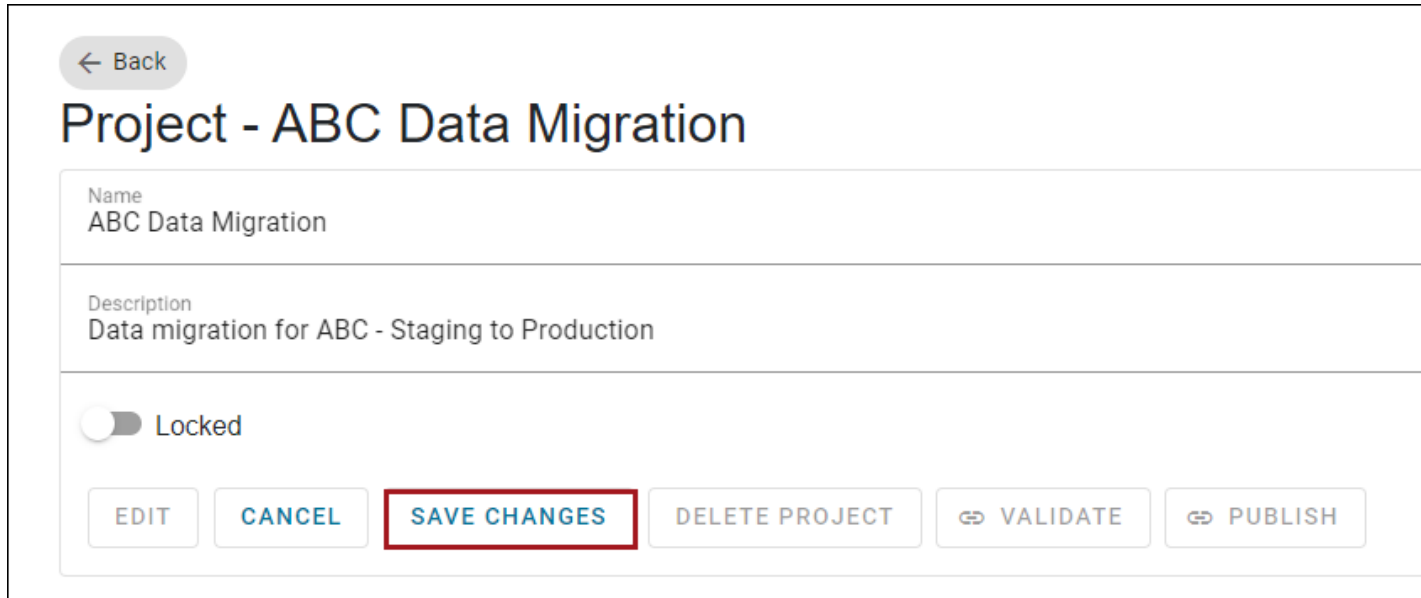
1. From a browser, navigate to iMIS Migrate.
2. From the left navigation, select **Project list**.
3. Click the **Add project** icon (+).



Name	Description	Created	Updated	
Molly v10 panel test - multi instance		9/27/2021 9:11:49 PM	9/27/2021 9:18:19 PM	→
Molly v10 panel test		9/27/2021 7:05:53 PM	9/27/2021 9:22:56 PM	→

4. Give the project a unique **Name** and **Description**. iMIS Migrate does not currently have a column for who the owner of the project is (or who created it). It is recommended to add who created or owns the project in the **Description** field.

5. Click **Save Changes**.



← Back

## Project - ABC Data Migration

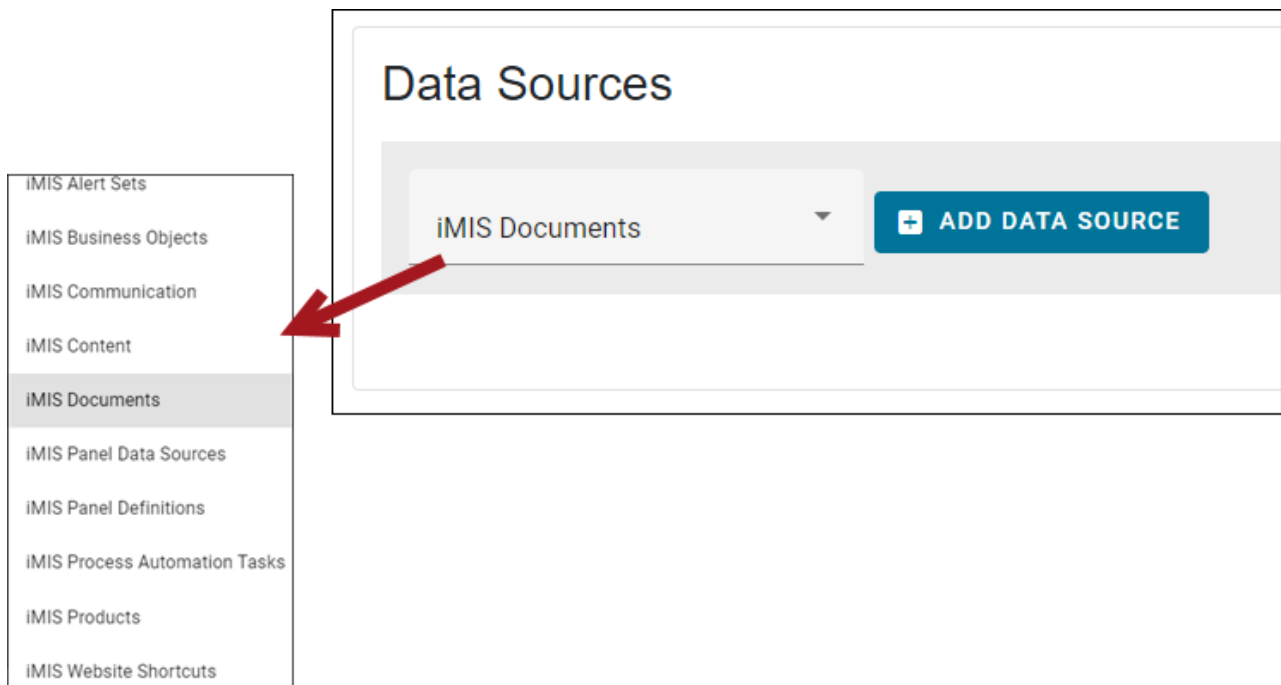
Name  
ABC Data Migration

Description  
Data migration for ABC - Staging to Production

☐ Locked

EDIT CANCEL **SAVE CHANGES** DELETE PROJECT VALIDATE PUBLISH

6. From the **Data Sources** drop-down, select the first data source type you need to migrate, then click **Add Data Source**.



IMIS Alert Sets

IMIS Business Objects

IMIS Communication

IMIS Content

**IMIS Documents**

IMIS Panel Data Sources

IMIS Panel Definitions

IMIS Process Automation Tasks

IMIS Products

IMIS Website Shortcuts

## Data Sources

iMIS Documents

+ ADD DATA SOURCE

7. A new section appears where you can start defining the data source that you are migrating. Enter a descriptive **Name**, so that it is clearly understood what is being migrated.
8. Click the **Select** button to choose the data source content. If you are migrating business objects, the button label is *Select Business Objects*; if you are migrating documents, the button label is *Select*

Documents.

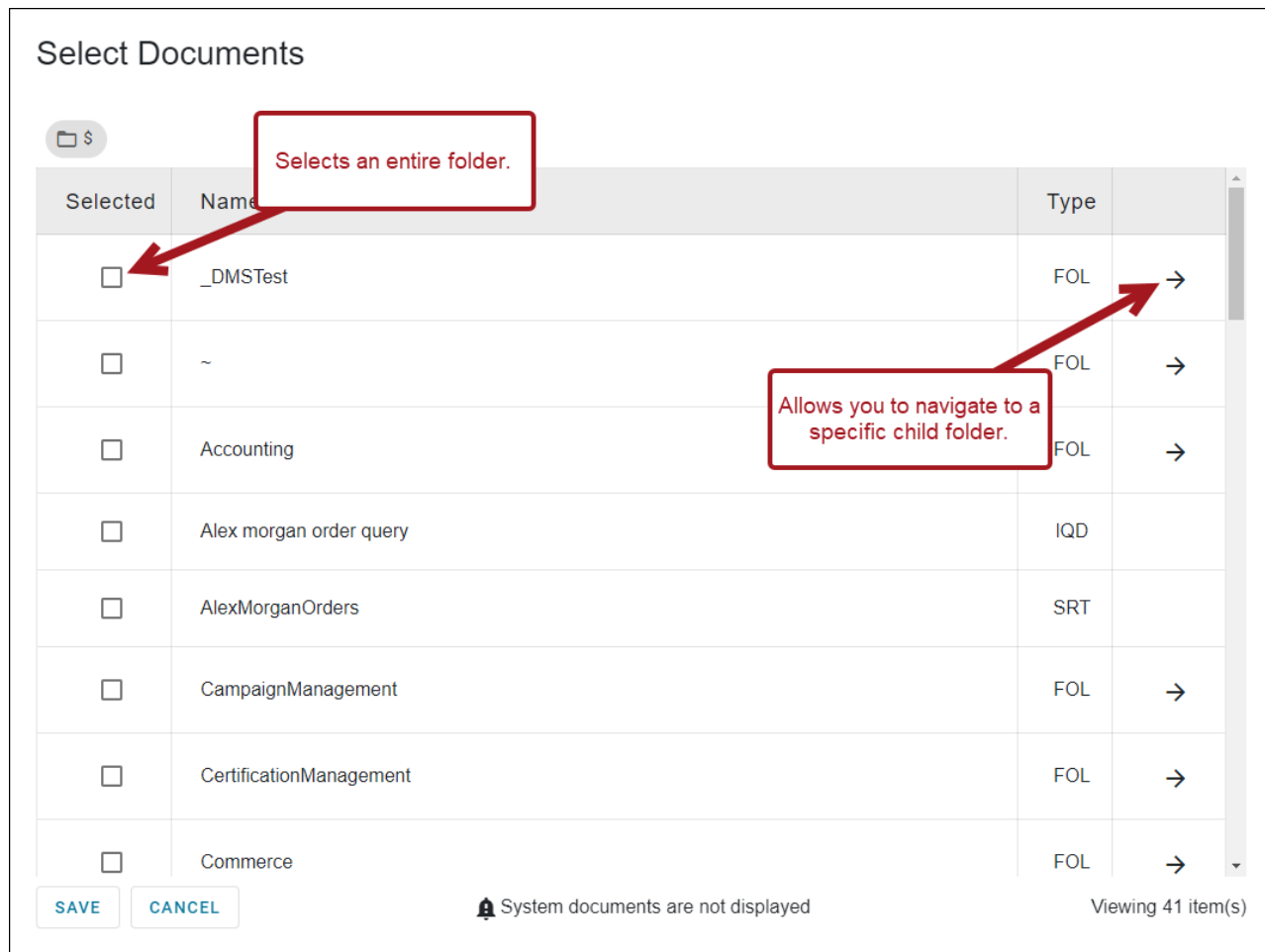
The screenshot shows a 'Data Sources' window. At the top, there's a header 'Data Sources'. Below it, a grey bar contains a dropdown menu with 'iMIS Documents' and a blue button with a plus icon and the text 'ADD DATA SOURCE'. Below this, a section titled 'iMIS Documents' shows the name 'All ABC documents in Document System created in staging'. Underneath is a table with columns: 'Selected', 'Name', 'Type', and 'Path'. At the bottom of the window, there are five buttons: 'EDIT', 'SELECT DOCUMENTS' (highlighted with a red border), 'CANCEL', 'SAVE CHANGES', and 'REMOVE'.

9. The **Source System Login** window appears:

The screenshot shows a 'Source System Login' window. It has three input fields: 'Uri\*' with the value 'https://abcccloud.imiscloud.com/', 'User name' with the value 'michelleb', and 'Password\*' with masked characters '\*\*\*\*\*'. At the bottom, there are two buttons: 'SUBMIT' and 'CANCEL'.

- URL:** Enter the **Source System URL**. This is the system that contains the data of interest. The URL must be the link to the public website, meaning **/staff** should not be included. The link must contain **https://** and not contain **www**. The link must end with a forward slash (/).  
**Example:** <https://abcccloud.imiscloud.com/>
- Username and Password:** Enter the system administrator username and password for the Source System.
- Click **Submit**. If the values provided are successfully validated, the pop-up window closes. If the values provided are not successfully validated, an error is displayed.

10. From the pop-up window, select the desired content using the available checkboxes or if applicable to the data source, use the arrows in the right column to navigate through a specific folder path.



11. Click **Save**.
12. Click **Save Changes**.



## Data Sources

iMIS Documents
ADD DATA SOURCE

### iMIS Documents

Name  
All ABC documents in Document System created in staging

Source Details  
Url: https://abccloud.imiscloud.com/, User Name: manager

Selected	Name	Type	Path
<input checked="" type="checkbox"/>	.HPNA Queries	FOL	\$/HPNA Queries
<input checked="" type="checkbox"/>	ICohere	FOL	\$/ICohere
<input checked="" type="checkbox"/>	Nurse Educator Contract Temp Job Posting.pdf	PDF	\$/Nurse Educator Contract Temp Job Posting.pdf
<input checked="" type="checkbox"/>	Scratch	FOL	\$/Scratch

EDIT
SELECT DOCUMENTS
CANCEL
SAVE CHANGES
REMOVE

**Important!** The documents are stored as they were at the time they were added to the project; meaning, if a document is modified or a new file is added to a selected folder after it was added to the project, the document or folder should be removed from the project and added back, so that the changes are recognized in the project.

13. To edit an individual data source selection, click **Edit**.

<input checked="" type="checkbox"/>	Posting.pdf	PDF	\$/Nurse Educator Contract temp Job Posting.pdf
<input checked="" type="checkbox"/>	Scratch	FOL	\$/Scratch

EDIT
SELECT DOCUMENTS
CANCEL
SAVE CHANGES
REMOVE

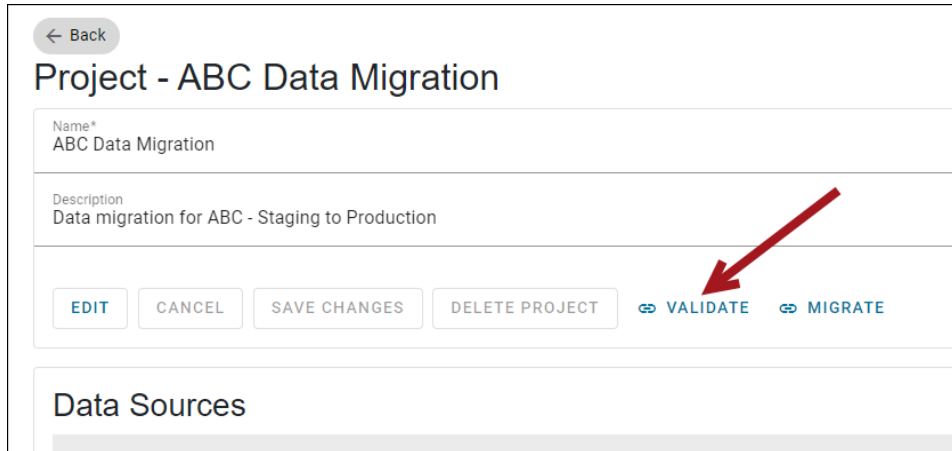
14. From the **Data Sources** area, select a new data source to continue adding data to the project. The new section is added to the top of the project.

15. Continue the process for any new data sources.

## MIGRATING A PROJECT TO A TARGET SYSTEM

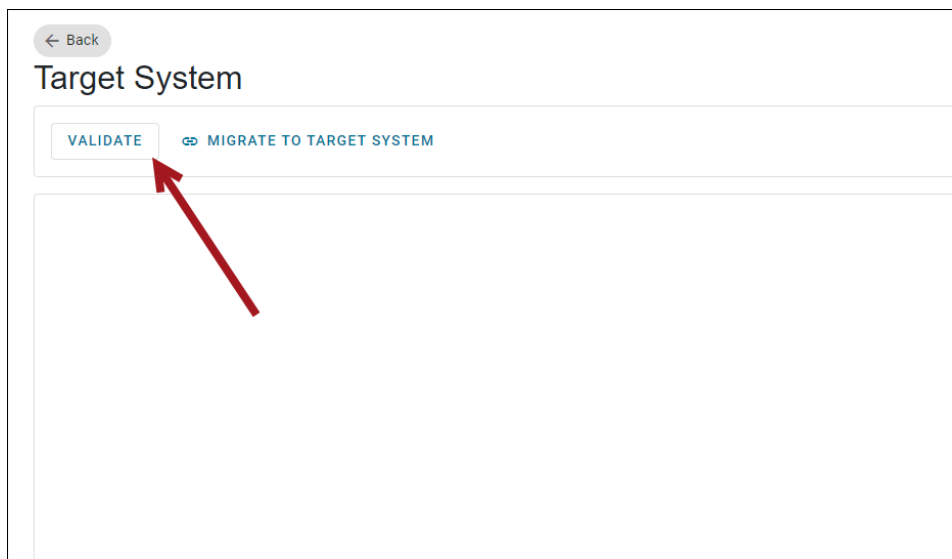
Do the following when you are ready to migrate data from the source system to the target system:

1. Open the project.
2. Select the **Validate** link to open the **Target System** window.



The screenshot shows a web interface for a data migration project. At the top, there is a 'Back' button. Below it, the title 'Project - ABC Data Migration' is displayed. The form contains two fields: 'Name\*' with the value 'ABC Data Migration' and 'Description' with the value 'Data migration for ABC - Staging to Production'. Below these fields, there are five buttons: 'EDIT', 'CANCEL', 'SAVE CHANGES', 'DELETE PROJECT', and 'VALIDATE'. A red arrow points to the 'VALIDATE' button. Below the buttons, there is a section titled 'Data Sources'.

3. Click the **Validate** button.



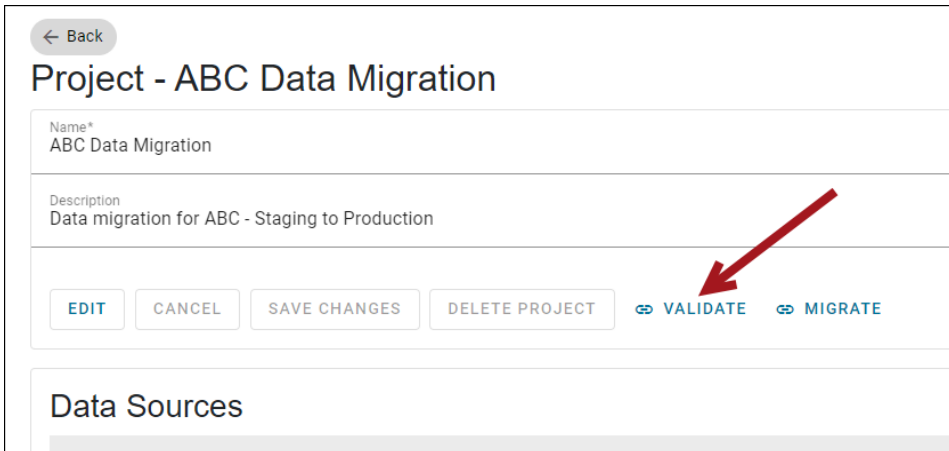
The screenshot shows a web interface for the 'Target System' window. At the top, there is a 'Back' button. Below it, the title 'Target System' is displayed. The form contains two buttons: 'VALIDATE' and 'MIGRATE TO TARGET SYSTEM'. A red arrow points to the 'VALIDATE' button.

4. From the **Target System Login**, enter the following:
  - a. **URL**: Enter the target system **URL**. This is the system that you are migrating data to. The URL must be the link to the public website, meaning **/staff** should not be included. The link must contain **https://** and not contain **www**. The link must end with a forward slash (/).  
**Example: https://abc.imiscloud.com/**
  - b. **Username** and **Password**: Enter the system administrator username and password for the target system.
  - c. Click **Submit**. If the values provided are successfully validated, the pop-up window closes. If the values provided are not successfully validated, an error is displayed.
5. iMIS Migrate begins validating the data to ensure there are no errors before the migration begins.
6. After validation, click **Migrate to Target System**. A log appears that details what is happening. When the migration is complete, the log details will display "Complete" in the last line of the logs.

## USING AN EXISTING STORED PROJECT TO MIGRATE DATA

You can use an existing project to migrate data to a new target system. Do the following to use an existing project to migrate data:

1. From iMIS Migrate, click **Project list**.
2. Locate the project, then click the right-arrow icon to open the project.
3. Review or update the data. If any of the existing data sources are edited, the source system credentials must be entered. If no data is being edited, the source system credentials do not need to be entered again.  
**Important!** If the data has been updated in the source system since it was added to the project, the data source must be removed and readded to the project.
4. Select the **Validate** link to open the **Target System** window.



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### Project - ABC Data Migration

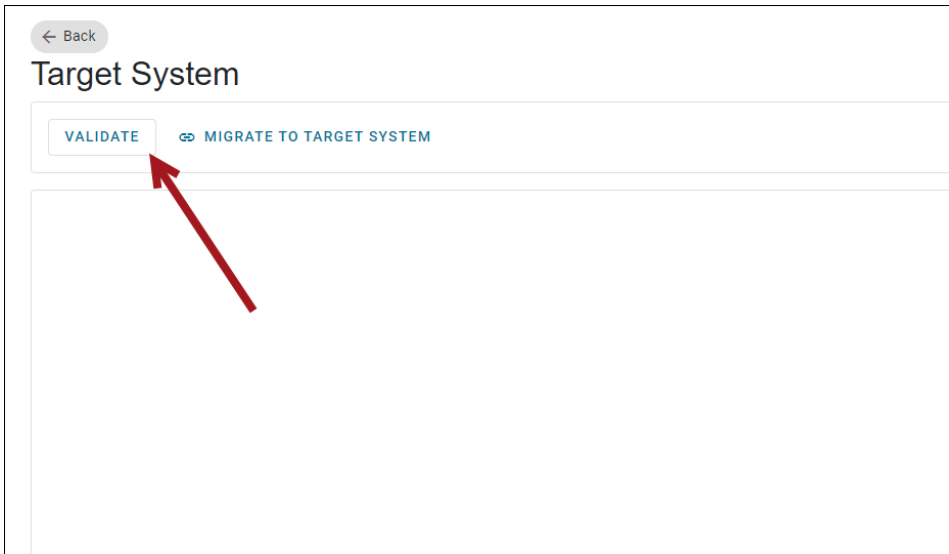
Name\*  
ABC Data Migration

Description  
Data migration for ABC - Staging to Production

EDIT CANCEL SAVE CHANGES DELETE PROJECT [VALIDATE](#) [MIGRATE](#)

#### Data Sources

5. Click the **Validate** button.



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### Target System

[VALIDATE](#) [MIGRATE TO TARGET SYSTEM](#)

6. From the **Target System Login**, enter the following:
  - a. **URL:** Enter the target system **URL**. This is the system that you are migrating data to. The URL must be the link to the public website, meaning **/staff** should not be included. The link must

contain **https://** and not contain **www**. The link must end with a forward slash (/).

**Example:** **https://abc.imiscloud.com/**

- b. Username and Password:** Enter the system administrator username and password for the target system.
  - c. Click Submit.** If the values provided are successfully validated, the pop-up window closes. If the values provided are not successfully validated, an error displays.
7. IMIS Migrate begins validating the data.
8. After validation, click **Migrate to Target System**. A log appears that details what is happening. When the migration is complete, the log details will display “Complete” in the last line of the logs.

## DELETING A STORED PROJECT

Do the following to delete a project:

1. From iMIS Migrate, click **Project list**.
2. Open the project using the right-facing arrow.

Projects				
Name	Description	Created	Updated	+
ABC Data Migration	Data migration for ABC - Staging to Production	9/28/2021 7:48:21 PM	9/28/2021 9:13:33 PM	→

3. Click **Edit**.

4. Click **Delete Project**.

## Project - ABC Data Migration

Name\*

ABC Data Migration

Description

Data migration for ABC - Staging to Production

☐ Locked

EDIT

CANCEL

SAVE CHANGES

DELETE PROJECT

VALIDATE

PUBLISH

## Project - ABC Data Migration

Name\*

ABC Data Migration

Description

Data migration for ABC - Staging to Production

☐ Locked

EDIT

CANCEL

SAVE CHANGE


DELETE PROJECT

VALIDATE

PUBLISH

5. Click **OK**.

### Confirm Delete

 Are you certain you wish to delete project ABC Data Migration?

This action can not be reversed.

CANCEL

OK