WIN-911
STANDARD
INTERACTIVE
ADVANCED

V7 IMPORT UTILITY

WIN-911 SOFTWARE

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1 INTRODUCTION

The purpose of this document is to assist the user when migrating from WIN-911 Version 7 (V7) to the latest WIN-911 Standard/Interactive/Advanced (S/I/A). It is assumed the user currently has a revision of the software already running.

An overview of the import utility will be discussed, followed by a description of what can and cannot be imported to the newest version of WIN-911. Finally, step by step instructions for the conversion process are discussed.

1.1 Import Utility Overview

It is important to note that WIN-911 V7 is an entirely different product, and some options of the V7 product DO NOT have a functional equivalent in the new product.

Some older notification types and data sources have become obsolete and are no longer supported. These items will either be changed into a modern equivalent or not imported. Items that can be imported are discussed in section 2, and items that cannot be imported are discussed in section 3.

After the import, the WIN-911 Administrator should carefully examine the results of the import and note the differences between V7 and the capabilities of WIN-911 S/I/A.

1.2 Software Requirements

To access the V7 import utility, the files to be imported must currently be running on V7.17. If you do not have this version of the software, you need to update to V7.17 to run the import utility.

The version number is found in the configurator "help and about" section.
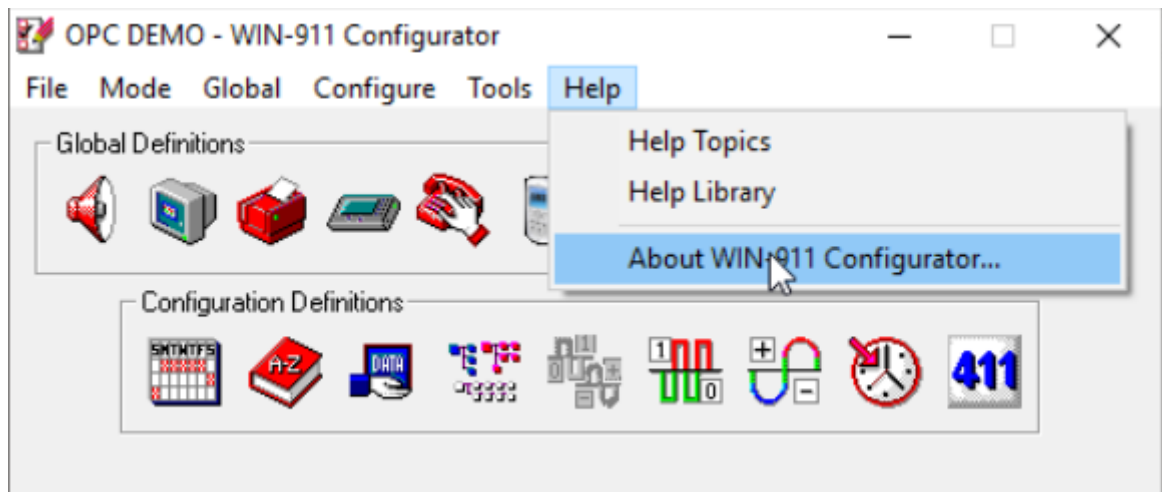
Figure 1 – Help and About

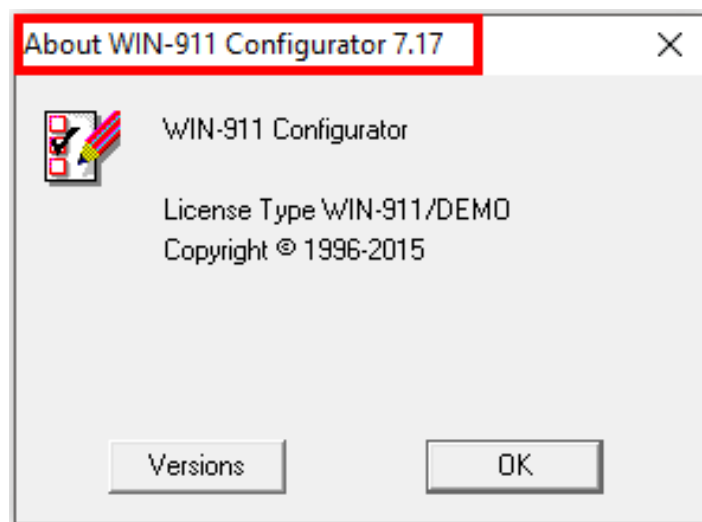**Figure 2 – Version Number 7.17**

1.3   Technical Glossary

This document uses the following new terminology:

- **WIN-911 V7,** also known as Version 7 (also known as V7), refers to the previous version of the WIN-911 software.

- **WIN-911 S/I/A** refers to the newest version of the WIN-911 software, which has three levels
    - Standard
    - Interactive
    - Advanced

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- **Importer** is the software utility used to convert a WIN-911 V7 configuration to a WIN-911 S/I/A configuration.

- **Roles** are used to group and organize Connections. Each Connection created will have a Role created based on the Name Definition and the Group(s) it is associated with from V7.

- **Labels** are used to group and organize Alarms. A WIN-911 Label will be created based on the Group the alarm was associated with in V7.

- A **Tactic** is the WIN-911 S/I/A functional equivalent to the WIN-911 V7 Group Contact List. There are two types, **Basic** and **Advanced**.

  - *Basic Tactics* are simply a list of connections. When a Basic Tactic is started, everyone on the list is notified in the order specified. When using the V7 Import Utility, Basic Tactics will be utilized to replicate Group Contact Lists.

  - *Advanced Tactics* require users to be on the Advanced license level and are not utilized by the V7 Import Utility.
    - Advanced Tactics are essentially flow charts which allow for creation of custom escalation plans using blocks. Each block represents either an action to be taken or a decision to be made. You may also place a Role and Labels in a Notification Block. When you do this, any connection which has that Role attached, will be notified. Advanced Tactics are quite powerful and quite nuanced. A full discussion on them can be found in the Dispatcher manual.

- **Strategies** specify the guidelines for starting, stopping and repeating notification.

- **Subscriptions** provide the ability to bring alarms into WIN-911 without the need of importing and maintaining an alarm list in WIN-911. For example, you can subscribe to all alarms with certain severity or grouping and then assign those alarms to a Strategy.

- **Subscription Routes** Associate Subscriptions with Strategies.

- **Connections** defines the specific endpoints WIN-911 S/I/A will send a notification to. For the email module, this is an email address. In other modules, like SMS and Voice, this is a phone number. The connection also defines the format that should be applied to messages, for both alarms and reports. The connection also determines the hours during which a user should be notified, his personalized Schedule.

1.4   More Information

- ***V7 Documentation***
    - http://www.win911.com/products/win-911-pro-legacy/

- ***WIN-911 S/I/A Documentation***
    - http://www.win911.com/products/win-911-standard-interactive-advanced/

- ***Knowledge Base***
    - https://supportdesk.win911.com/support/solutions

1.5   Instructional Videos

- Step by step instruction for use the V7 importer
    - http://www.win911.com/how-to-videos/

2   ITEMS THAT CAN BE IMPORTED

The conversion utility does not convert all file types over to the new software. Some legacy features are no longer supported. Section 2 will cover items that will be converted into the new version.

2.1   Notifiers

The following notifiers can be imported into the new product:

- Email Gateway & Connections
- SMS Connections
- Voice Connections
- Mobile-911 Gateway & Connections

2.2   Data Sources

The following data sources can be imported into the new product:

- OPC DA
- iFIX
- InTouch
- FactoryTalk Alarms & Events

If your V7 Data Source is not listed for import, and you do not have access to any of the supported Direct Connect SCADA alternatives, the most viable option is to import all your connections, and utilize an OPC DA server.

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2.3 Reports

Reports only containing supported data types (OPC DA, iFIX, InTouch)

2.4 Conversion of V7 Phonebook into Associated Connections in S/I/A

WIN-911 V7 creates Phone Book Entries with a unique Name, Access Code and Acknowledge Code to which multiple Connections can be assigned. Each Phone Book Entry can be assigned to a Group's Callout List. All Connections defined for the Phone Book Entry are utilized in the Callout List. Filters, Digital Alarms, Analog Alarms and/or Watchdog Alarms are associated with one and only one Group.

An example of what the phone book looks like in V7 of the software is shown in Figure 3 and Figure 4.
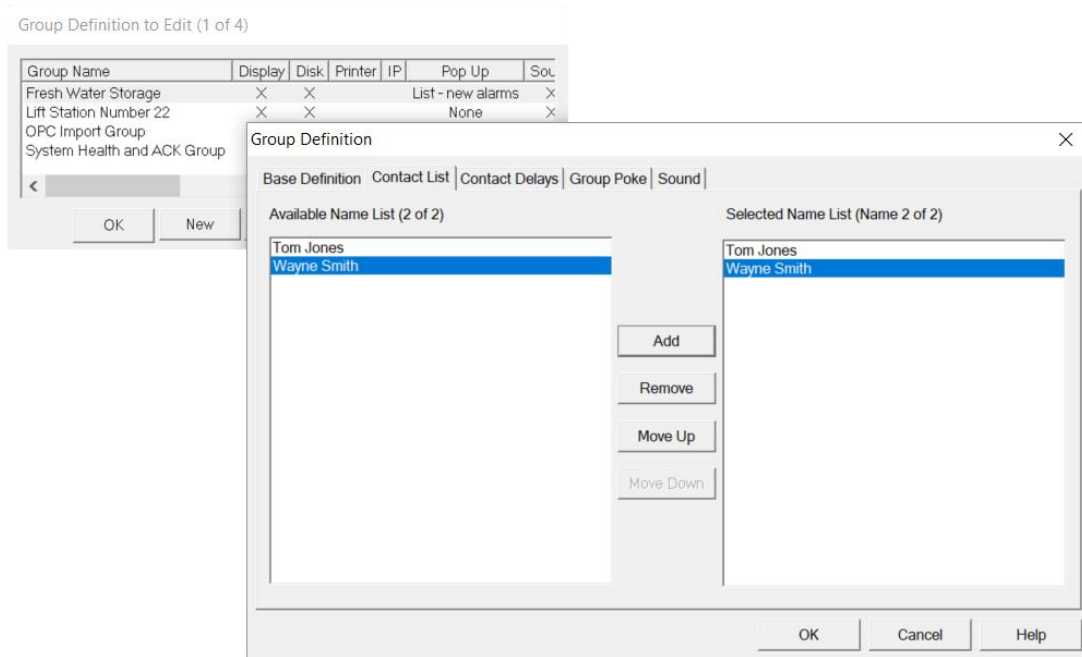

Figure 3 – V7 Phonebook Entry

Figure 4 – V7 Contact List

The WIN-911 S/I/A model **does not** have the same concept of V7 Phone Book Entries. Rather, the connections themselves are the entities to which the alarms messages are routed, and each Connection has its own authentication method. These Connections are assigned to a Basic Tactic (S/I/A's equivalent to the V7 Group Callout List). The Tactics are invoked by a Strategy which receives alarm events.
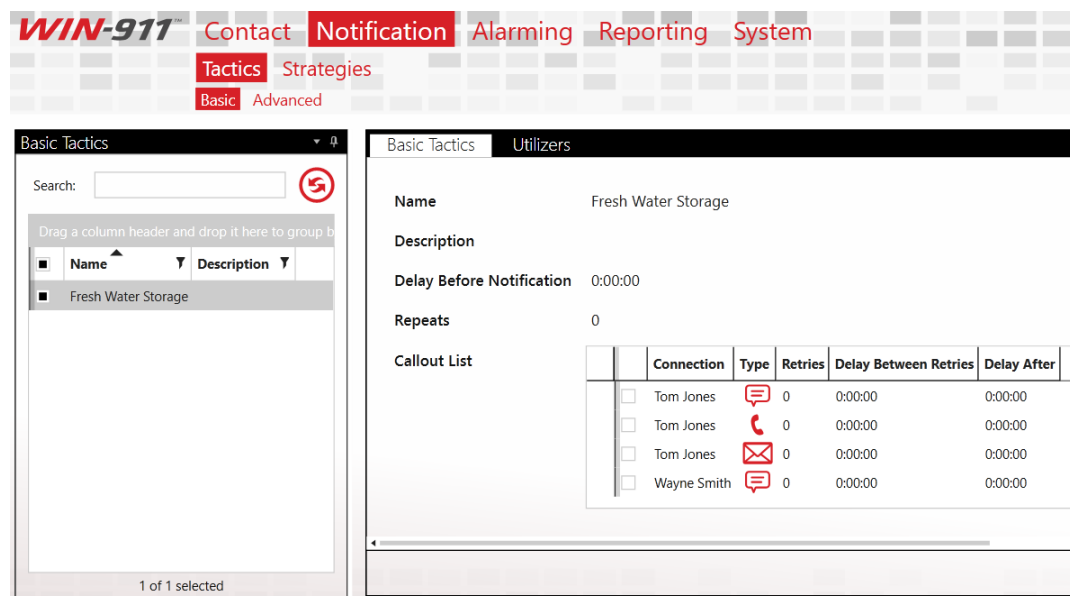

Figure 5 – Basic Tactics

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During the conversion, the V7 Phone Book Entries and their connections are parsed into individual Connections (i.e. Email address or SMS phone number, etc.). The utility creates a Role with the name of the Phone Book Entry and assigns it to the Connection.

Figure 6 – Role Assignment for Individual Connections

The V7 Access Code serves as an authentication method for Voice connections during an interactive call. The code is assigned to any interactive voice connection so long as it is unique and does not begin with a zero. If either of these two conditions are flagged, a new code beginning with the single digit "1" and incrementing sequentially will be assigned. These modifications will be documented in the warning screen and logged in the importer logfile.

Figure 7 – Authorization Code

The V7 Acknowledgement Code serves as a separate code which validates an attempt by a Voice or SMS user to acknowledge an alarm event. Any V7 Acknowledgement Code that does not pass validation will be prefixed with "911" for the destination "Password" as shown in Figure 8. Modification of these codes will be documented via the warning screen and logged in the importer logfile.
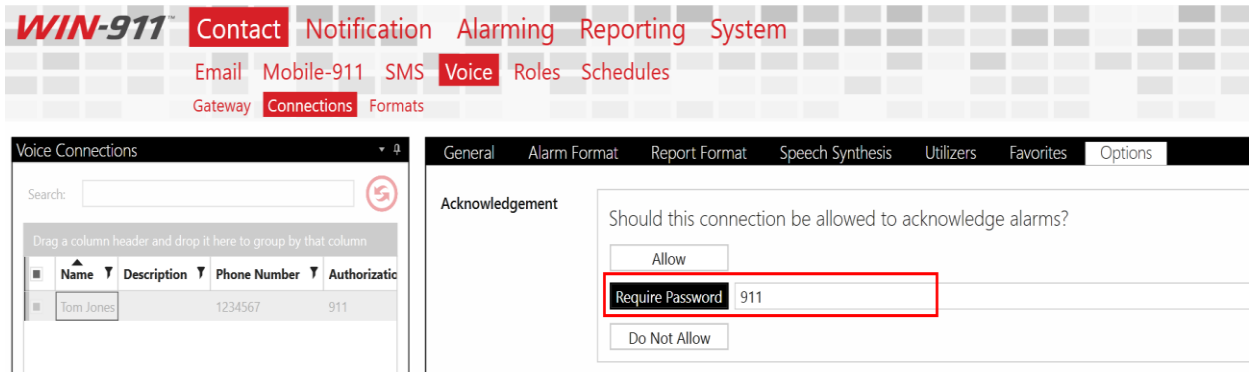

Figure 8 – Validation Attempt

Custom developed V7 Schedules that have been assigned to at least one connection, will be conditionally replicated in the new product and assigned to its associated connection. The name of the schedule is preserved but that actual schedule (with on-duty appointments) is replaced with an "Always-on-schedule".
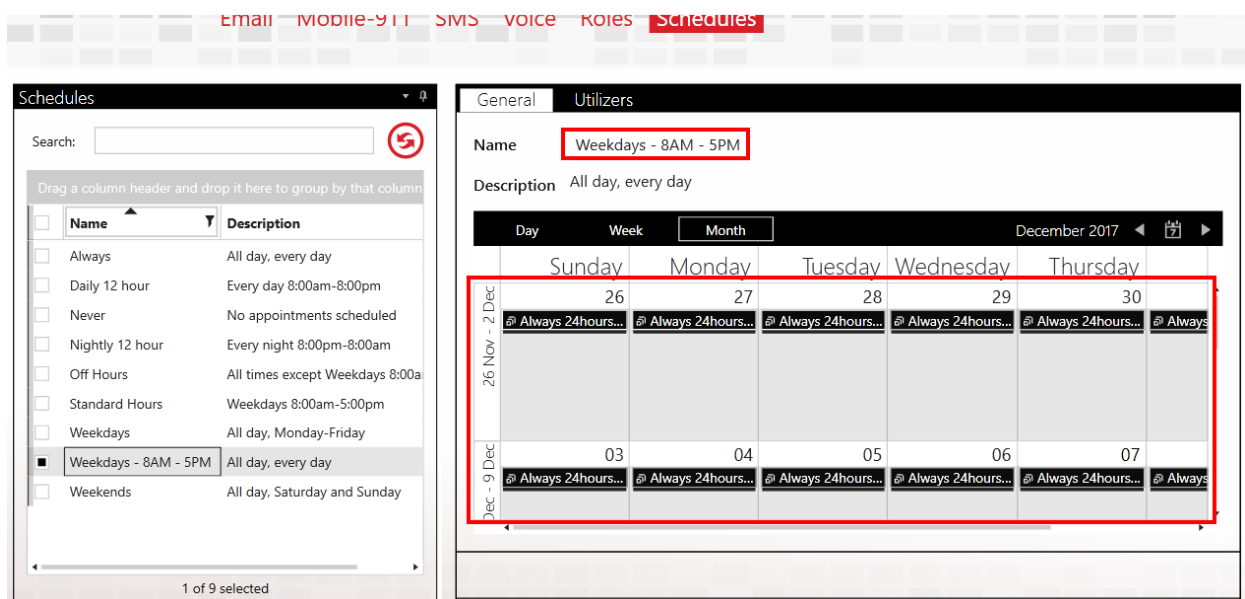

Figure 9 – Schedules

2.5   Conversion of Escalation Rules

The S/I/A escalation model states that an alarm event will initiate a Strategy, which will evaluate its policies to start Tactics. This Tactic will continue to process until it concludes or it is stopped by the Strategy. The event that stops the Tactic is configured within the strategy.

A basic tactic will be created for each Group containing at least one user in the V7 phone book with a supported connection type.

A Role will be created for each user in the V7 phone book, regardless of their connections or group membership. A Role and Label will be created for each group in the V7 phone book, regardless of their alarm assignment or user assignments.

Figure 10 – Role Definition

Figure 11 – Comparison Notes

i *Roles and Labels are Advanced features which can be used for organization purposes only with the Interactive license level. In order take full advantage of these feature, you must be using the Advanced license.*

2.6 Conversion of Reports

Any report with missing or unsupported items will not be imported. All other Reports will be imported with the V7 Report number serving as both the new Report number and name.

3   ITEMS NOT SUPPORTED BY THE IMPORTER

This section will provide an overview of items that will not be imported from V7 of the Win-911 Software. Some features have become obsolete and will no longer be supported.

3.1   Schedules

Schedules **are not** imported from V7. During the import, V7 schedules associated with connections will be created with the V7 schedule name (i.e. 'Weekdays 5PM – Midnight'), but the actual 'on-duty' time-slots will set to 'Always'.

After the import, the WIN-911 administrator must modify each schedule to replicate the previous coverage.

The WIN-911 V7 schedules are based off a 24-hour time range, so operator's schedules with overlapping days (e.g. Monday 6:00 PM - Tuesday 6:00 AM), were required to create multiple schedules/connections for the operators Name Definition.

WIN-911 S/I/A utilizes more powerful scheduling, and is easier to configure overlapping days. Below is a link to a Knowledge Base article on how to configure a schedule.

https://supportdesk.win911.com/solution/articles/24000018790-scheduling

3.2   Dialogic

D4PCI telephony boards are no longer supported. Voice connections will be retained with VoIP or TAPI.

3.3   Pagers

Any numeric pager, alpha numeric pager, whether 'dialout' or 'local' **cannot** be imported. The technology is generally obsolete and fallen into disuse. For this reason, this notifier has been dropped from support. Check with your service providers about a proxy-solution that accepts email and SMS messages which they convert into pager messages.

3.4   Dialout Announcer Notifier

The Dialout Announcer notifier is **no longer supported**. In this case the utility will convert the connection type to Voice Pager, which is supported (Voice non-interactive connection).

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3.5   Miscellaneous

The following features are not supported on WIN-911 S/I/A.

- The Local Announcer Option
- Alarm Printing
- ASCII Poke
- IP Alarming

3.6   Alarm Logging

The Alarm Log Manager has been replaced with WIN-911 Log Viewer as well as Windows Event Viewer. You will find alarm and alarm notification information in the WIN-911 Log Viewer while information about the WIN-911 runtimes, errors/warnings, are found in the Windows Event Viewer. In addition to the new WIN-911 Log Viewer, alarms logs are now stored in a SQL database.

3.7   Alarm Monitor

The V7 Alarm Monitor has been replaced with the WIN-911 Log Viewer. The following V7 Alarm Monitor features are currently not supported ion WIN-911 S/I/A.

- Pop Up on Alarm – Configured in Group Definition
- Ability to disable sending alarms to the Alarm Monitor – Configured in Group Definition.
- Local Announcer
- Editing alarm state color scheme – Configured in Monitor Definition

3.8   Legacy HMI/SCADA Data Sources

Several HMI/SCADA/Data Source options have been deprecated since being developed for WIN-911 V7. These include:

- RSView32
- viewLinc
- DDE
- RSView SE (FactoryTalk View SE HMI Tags)
- RSView ME (FactoryTalk View ME)

FactoryTalk Alarms & Events is supported in the new version, but the Gateway portion of the data source cannot be imported. The V7 user name and password are encrypted in a method that cannot be decrypted.

Wonderware System Platform (Archestra) is supported in the new version but has been redesigned to leverage alarm subscriptions rather than tags. Any Wonderware System Platform data source developed in V7 will not be imported.

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4 V7 IMPORT UTILITY INSTRUCTIONS

Prior to running the importer, create a backup of your .MDB and .INI files.

4.1 Launch the V7 Import Utility

Open Start > WIN-911 > V7 Importer

Figure 12 – V7 Importer

4.2 Import File Selection

A proper migration of a V7 configuration depends on two files, the WIN-911.ini and the user-named.mdb file.

Select the location of the .INI and .MDB files you wish to convert.

The default location for these files is:
C:\Program Files (x86)\Specter Instruments\WIN-911 V7\Configuration Files

To navigate to a different folder, click on the ellipse icon 〔⋯〕. Note in this example the file name is called "My V7 Configuration".

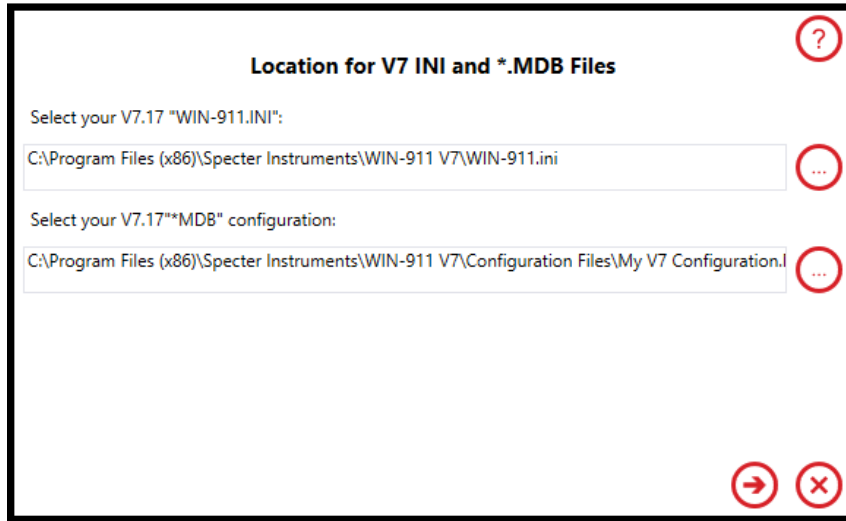Once your files are selected click the next arrow. ⊕

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Figure 13 - Configuration Location

4.3 Ready to Import

Prior to the actual migration of your V7 items a manifest list is presented for you to review. The list shows the quantity and the type of items to be imported.

If edits are required prior to import, they must be made in the WIN-911 V7 Configurator.

At this point, nothing has been imported, therefore you may use the Back button to return to a previous step.
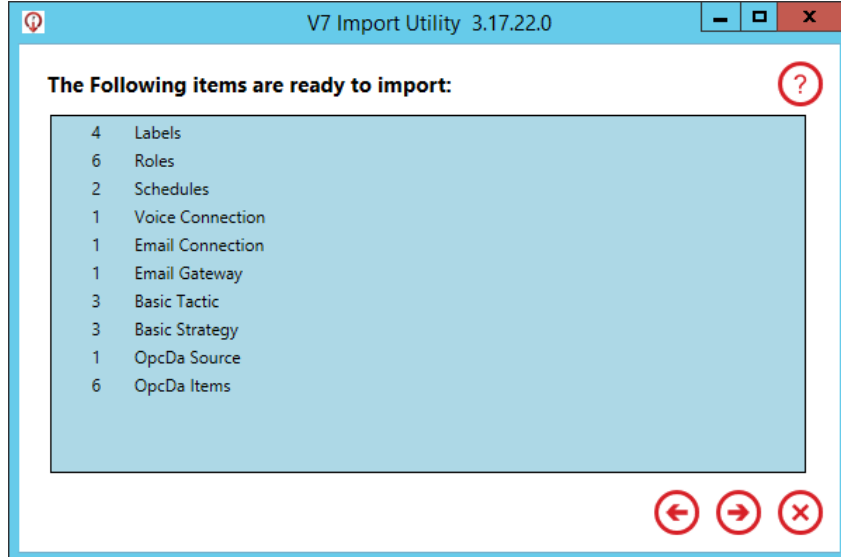

Figure 14 - Ready to Import

An overview of the items ready to import is as follows:

Labels – A WIN-911 Label will be created based on the Group the alarm was associated with in V7.

Roles – Each connection created will have a Role created based off the Name Definition and the Group(s) that Name Definition it is associated with from V7.

Schedules - Schedules **are not** imported from V7. If a V7 scheduled is associated with a connection, the V7 schedule name **only** will be imported (i.e. 'Weekdays 5PM – Midnight'), but the actual 'on-duty' time-slots will set to 'Always', <u>Additional configuration is required.</u>

Connections – Each V7 Connection Definition will translate to a new connection into WIN-911 S/I/A. Below are the supported connections.
- SMS
- Voice
- Email
- Mobile-911

Gateway – Previously configured gateways. Below is a listing of the Gateways that will be imported.
- Mobile-911 – Server location
- Email – Email server information (note: WIN-911 S/I/A supports SSL, Stunnel is no longer required in S/I/A.

Basic Tactic – Groups configured in V7 will be translated to a Basic Tactic with the same name and configured users.

Basic Strategy – Strategy will trigger a Basic Tactic (Converted from V7 Group), and will be named after V7 Group. If a tag was set to auto ack in V7, it will be configured with a policy to Auto-Ack when alarm is Inactive.

Data Sources and Items – WIN-911 S/I/A and V7 both share support for select connections. Below are the data sources that will convert from V7 to S/I/A
- OPC DA Server – Server Class and Machine Name
- OPC DA Tags – OPC tags along with alarm set points
- FTAE Filters – FTAE Server will have to be reconfigured
- iFIX Source
- iFIX Blocks
- InTouch – V7 supported a local InTouch application, if wanting to configure remote connection, additional configuration is required.
- InTouch Tags
- Reports – Previously known as 411 Reporting.

4.4   Begin the Import

Once you are satisfied with your selected items, click the Next button ➜ and the import will bring the selected items into your new WIN-911 S/I/A configuration.

The time required to complete the conversion is based on the number of tags imported. The progress bar will indicate the status of the import.
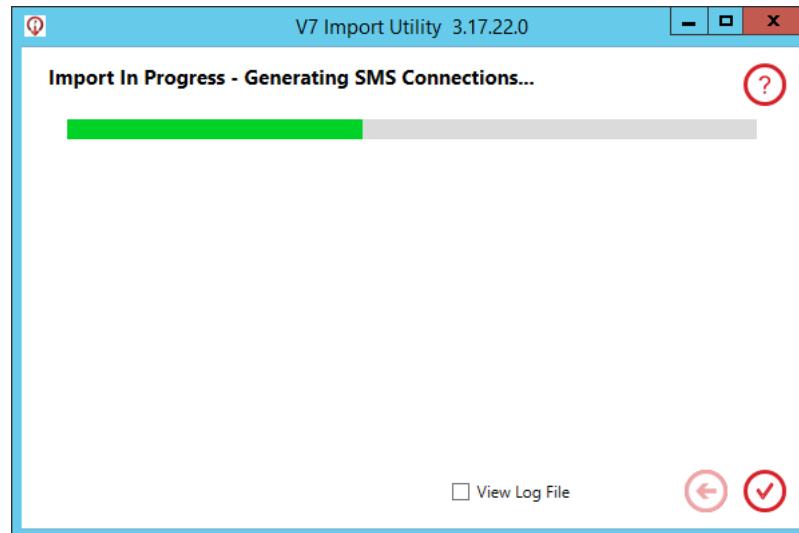

Figure 15 – Import in Progress

4.5   Import Completed Successfully

A successful conversion has imported all objects required for a conversion to run. If you receive some error messages, troubleshooting information is provided in Section 5 Troubleshooting. If a conversion is successful the following message will appear.
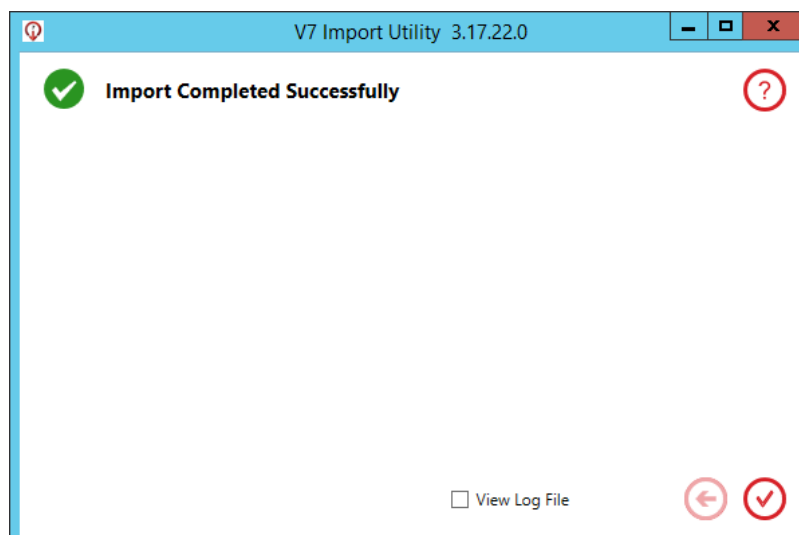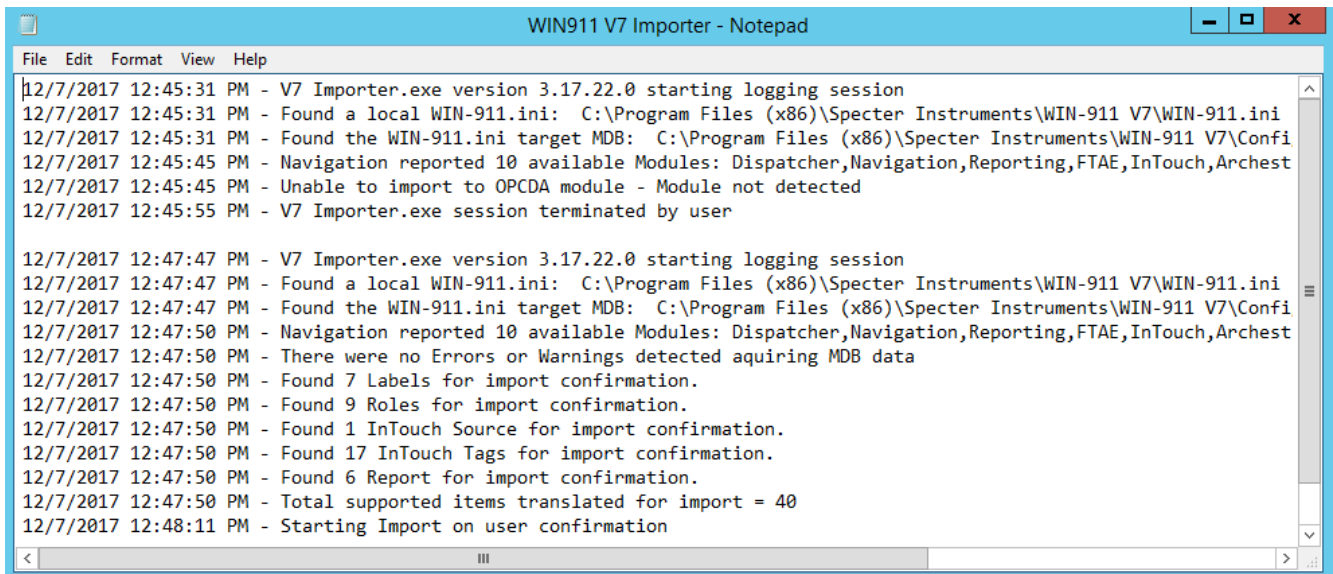
Figure 16 - Import Completed Successfully

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4.6   Partial Import

A Partial import indicates that one or more objects from the manifest list did not import successfully.

Any object the utility fails to import is logged in the Importer log file. Open the logfile by selecting the "View Log File" check box prior to closing the GUI or open it directly from C:\Users*User Name*\AppData\Local\Temp\WIN911 V7 Importer.log.
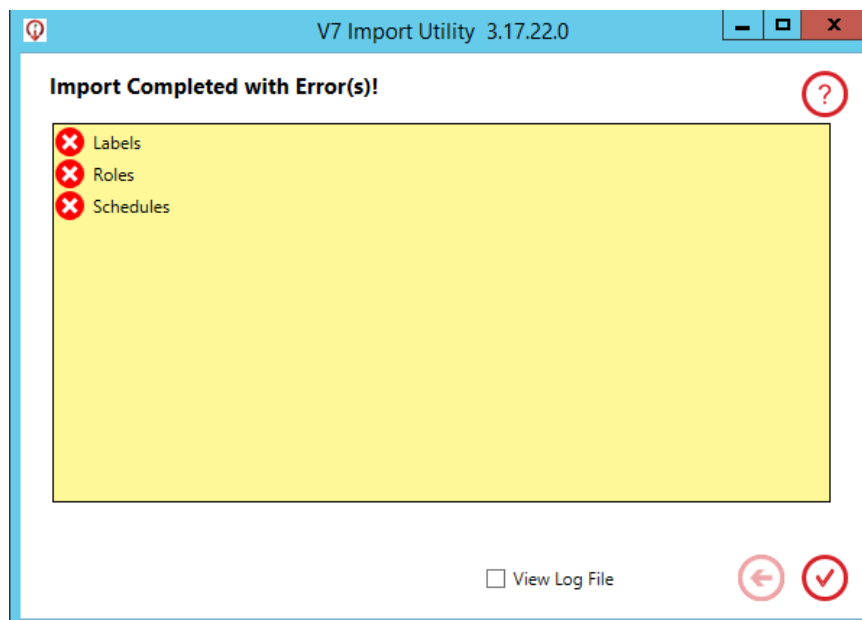

Figure 17 – Importer Log File Example

Figure 18 - Partial Configuration Saved

5 TROUBLESHOOTING ERRORS AND WARNINGS

There are three types of issues that you will be concerned with during the import: Fatal Errors, Non-Fatal Errors, and Warnings.

- **Fatal Error**: Issues that will stop the process and must be addressed to continue.
- **Non-Fatal Error**: Indicates the presence of objects which will not be imported. This error is not severe enough to prevent the process from continuing, but will create a partial import.
- **Warning:** Indicates the presence of objects that will be modified by the import.

The presence of Non-Fatal Errors or Warnings, will allow the user to "Continue Anyway", or stop and address the issues.

5.1 Fatal Error Troubleshooting

Fatal Errors are indicated by the triangle with an exclamation point.

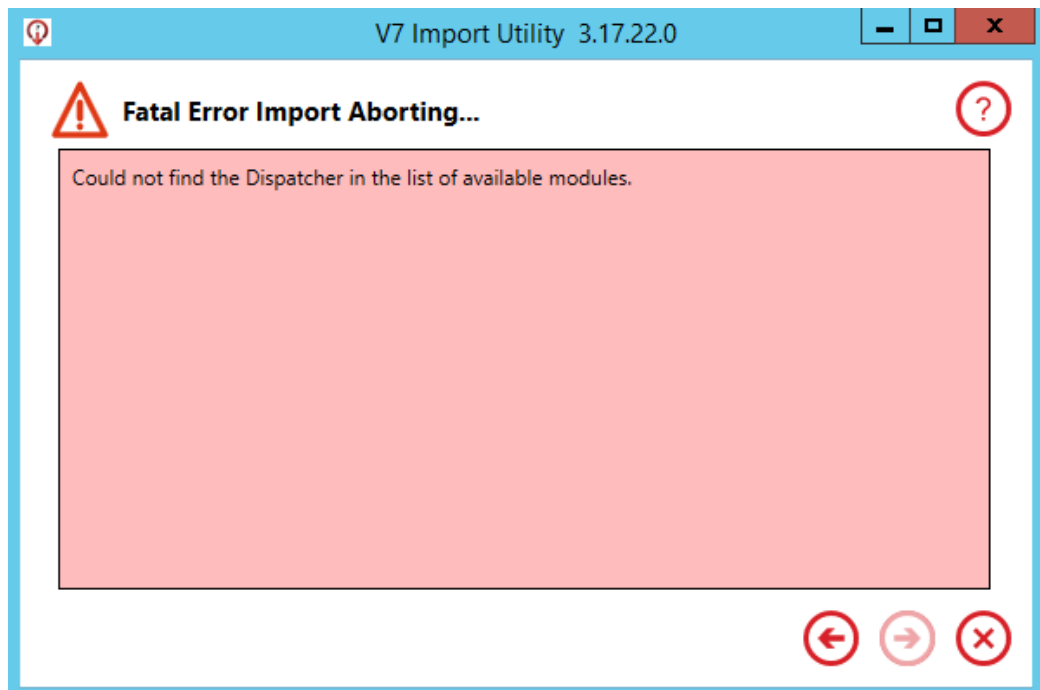**Figure 19 – Fatal Error Indicator**

Figure 20 - Fatal Error Import Aborting

The following are troubleshooting tips if a fatal error occurs.

    a. **Problem:** The .INI file is inaccessible due to user permissions**.**
    b. **Solution**: The properties of the .INI file need to be set with user "Everyone" and Permissions to Modify, Read & Execute, Read, Write.

    a. **Problem:** The .INI file is corrupt.
    b. **Solution:** This issue may not be solvable with the original file because it is now in a format that Windows cannot understand. Copy a new .INI file from the Support Folder and reconfigure the top row of buttons in the WIN-911 Configurator to restore the file. OR, if you have a backup copy, you might try that first.

    a. **Problem:** The file is not located in the folder selected by the user.
    b. **Solution:** Find the .INI file and copy it into the proper location or use the browse ⬭ button to remap the path to the current location of the file.

    a. **Problem:** The .MDB file is inaccessible due to user permissions**.**
    b. **Solution:** The properties of the .MDB file need to be set with user "Everyone" and Permissions to Modify, Read & Execute, Read, Write.

    a. **Problem:** The .MDB file is corrupt.
    b. **Solution:** This issue may not be solvable with the original file because it is now in a format that Windows cannot understand. If you have a backup copy you might try that, otherwise you will have to rebuild your configuration file or bypass the import all together and start fresh with the new product.

    a. **Problem:** The file is not located in the folder selected by the user.
    b. **Solution:** Find the .MDB file and copy it into the proper location or use the browse ⬭ button to remap the path to the current location of the file.

    a. **Problem:** Difficulty getting the list of modules from the new product.
    b. **Solution:** Make sure you are running the import utility with appropriate access permissions to your WIN-911 S/I/A installation.

    a. **Problem:** A list of modules is included, but the files do not include a dispatcher.
    b. **Solution:** Remap the Modules or reinstall the Dispatcher module.

    a. **Problem:** A dispatcher module was not installed.
    b. **Solution:** Install the WIN-911 Dispatcher module.

5.2 Some Items Cannot be Imported

Items that cannot be imported are indicated by the Non-Fatal Error or Warning icons.

Figure 21 – Non-Fatal Error Indicator

Figure 22 – Warning

If a non-fatal error occurs, the user can fix the error in V7 of the product and try again. The user also has the option to "continue anyway". If you continue anyway, then the

errors with a red   will not be imported.

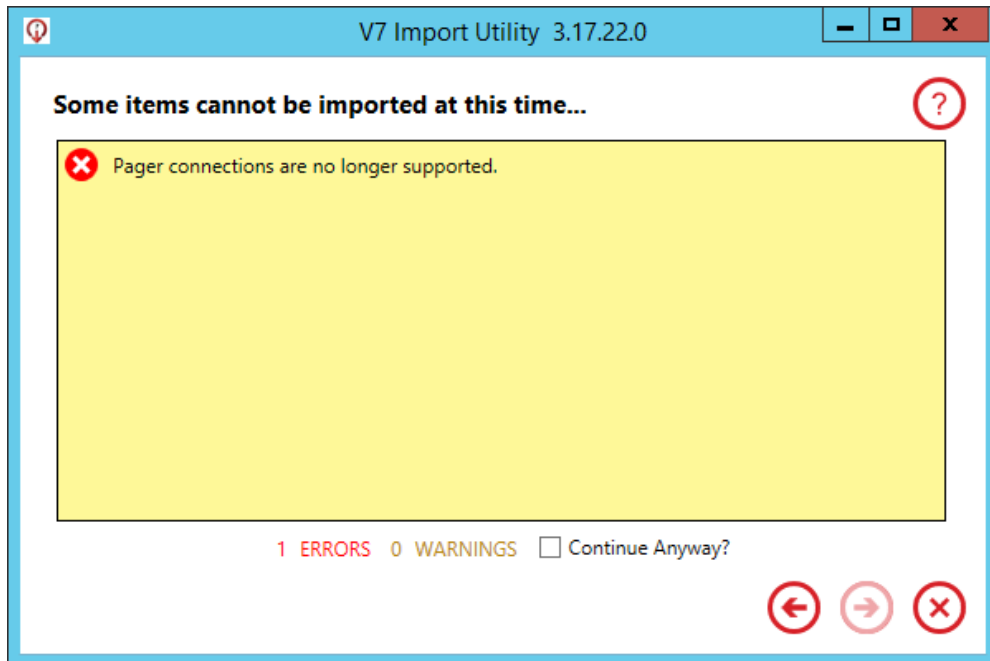The blue indicates a warning to make the user aware of a necessary change which will be made during import.

Figure 23 - Some Items Cannot Be Imported

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