# ivanti

# Xtraction

Xport Utility Guide

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# Introduction

Xtraction's Import/Export utility, called Xport, is provided with each release and is located in the Tools directory. Its primary function is to copy Xtraction items (folders, dashboards, documents, reports, and filters) from one Xtraction instance to another Xtraction instance. ("Instance" refers to an Xtraction installation.) For example, you could use the utility if you created dashboards during testing and now want to put them into production. The Xport utility can locate the dashboard items and any associated images and templates and copy them to another instance.

Here's a brief overview of how the utility works:

- Run Xport from the Tools directory of the Xtraction instance (source): Connect to the Xtraction database. Choose which items to copy and save your selection. Exit Xport.
- Run Xport from the Tools directory of the Xtraction instance (destination): Connect to the Xtraction database. Locate the saved Xtraction items. Choose which folder to import into and complete the import process. Check all the items imported before finalizing and saving your imported items. Exit Xport.

For detailed information about using the utility, see the "Running the Xport utility" section below.

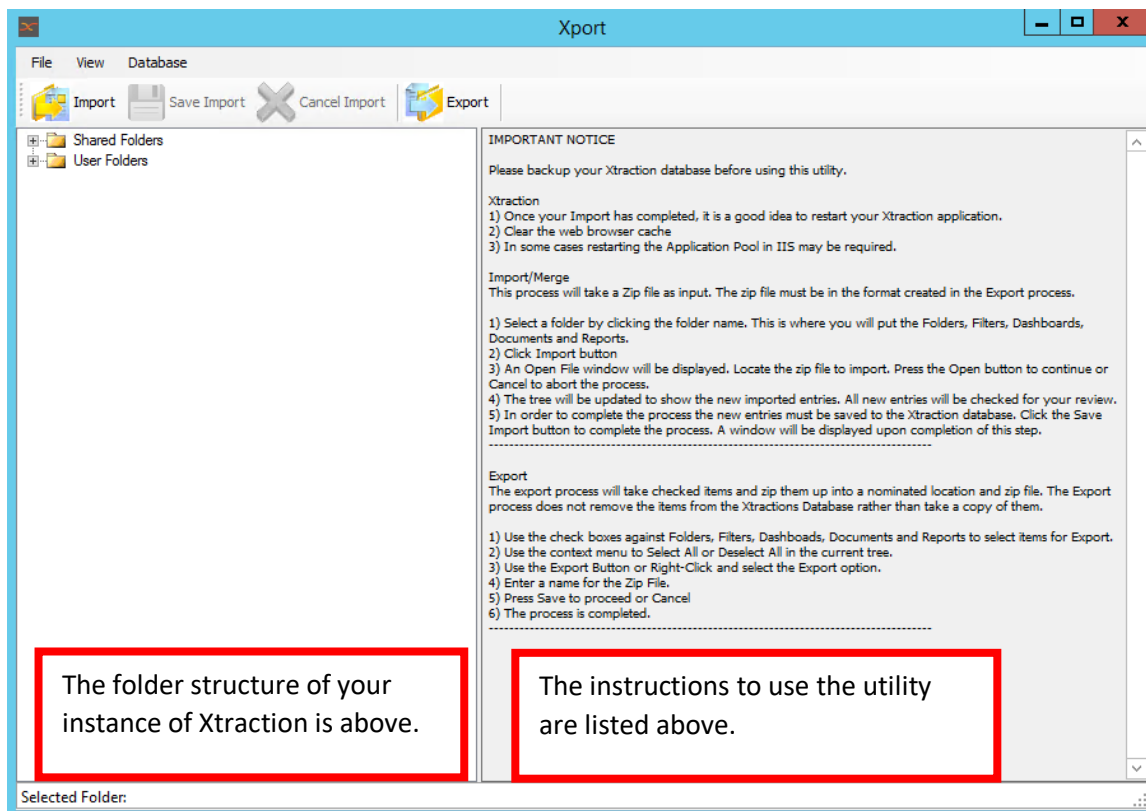## Important rules about importing folders and items

Xtraction has two top-level folders called **Shared folders** and **User folders**. You cannot copy these folders. You can, however, copy their content, but there are rules that may restrict you from importing into a new Xtraction instance:

- If the import folder selected is **Shared folders**, then only folders can be added at this level. Items such as documents, filters, reports, and dashboards cannot be imported at the top level.
- If the import folder selected is **User folders**, then no new folders can be created at the top level. To import the user folder myDomain\myUsername, this folder must already exist as a User folder.
- Folder content will be merged if the folder already exists in the destination Xtraction instance. The last date modified will be used to determine the newest item if two items are the same during a merge.
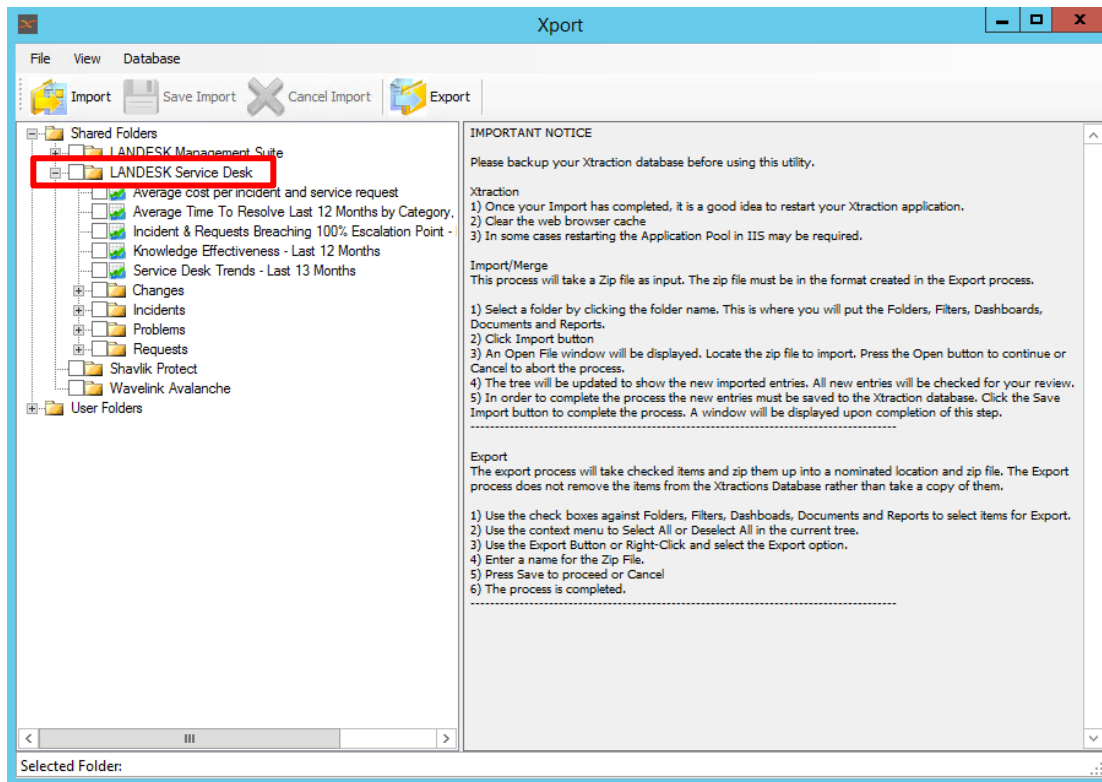
# Running the Xport utility

**IMPORTANT**: Before running this utility, it's important that you back up your destination Xtraction database.

1. Double-click **Xport.exe** in the directory where it was installed (by default, C:\Program Files(x86)\Xtraction Software\Xtraction\Tools). Remember the following:

   - **Exporting:** Perform this on the source server.

   - **Importing:** Perform this on the destination server.

2. The utility will load using your Xtraction database connection details, and you'll see this initial screen:



The folder structure of your instance of Xtraction is above.

The instructions to use the utility are listed above.

3. Expand the directory structure to see the items you're interested in.

**NOTES:**

- If you make a change to the folders (copy a dashboard, create a new folder, etc.) you can refresh the folder structure in Xport by reconnecting to the Xtraction database via the **Database > Edit Connection** menu option.

- All items in the folder structure have an owner (generally the person who created the item). You can change the structure via the **View > Options** menu option. Select **Hide Inactive Owner Items** to prevent items from displaying that belong to an inactive owner. Changing this setting will rebuild the view and display the items that can be exported.
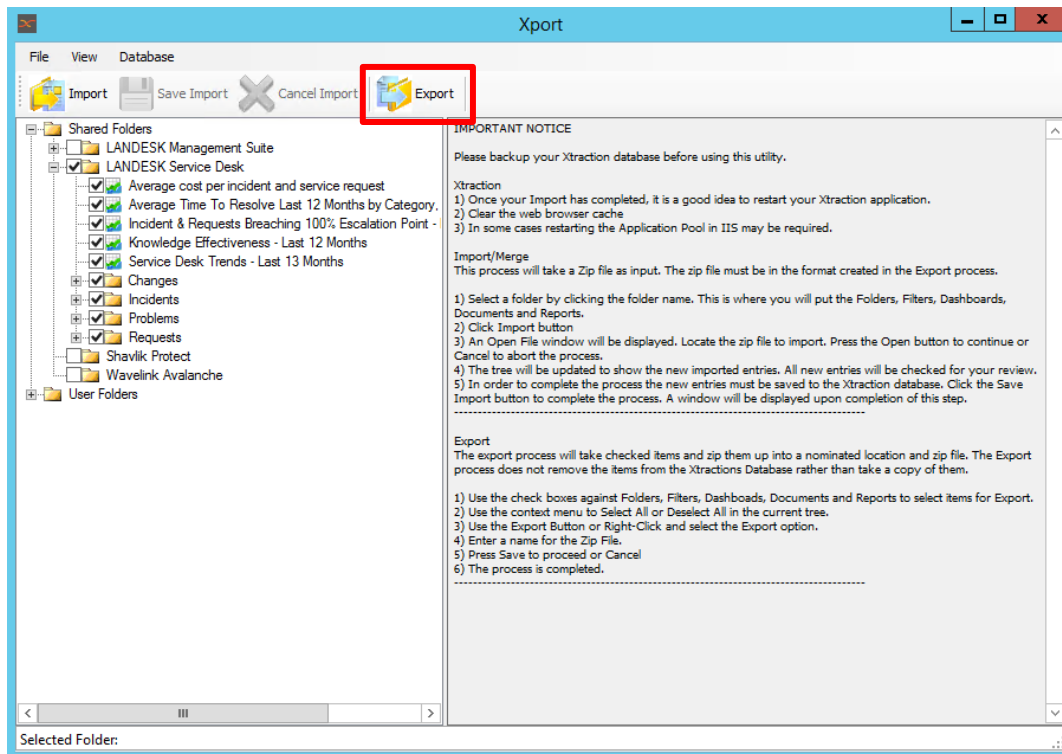
# Exporting folders, filters, dashboards, documents, and reports

The export process takes checked items and zips them up into a specified location and zip file. The export process does not remove the items from the Xtraction database. It simply takes a copy of them.

1. Mark items for export by selecting the check boxes next to them.
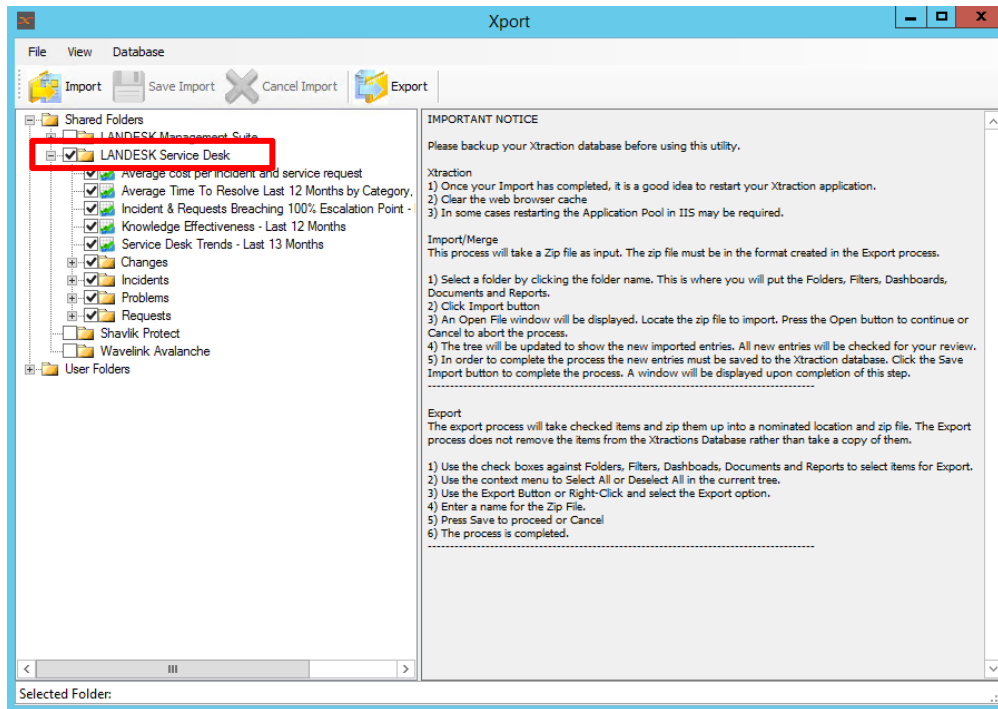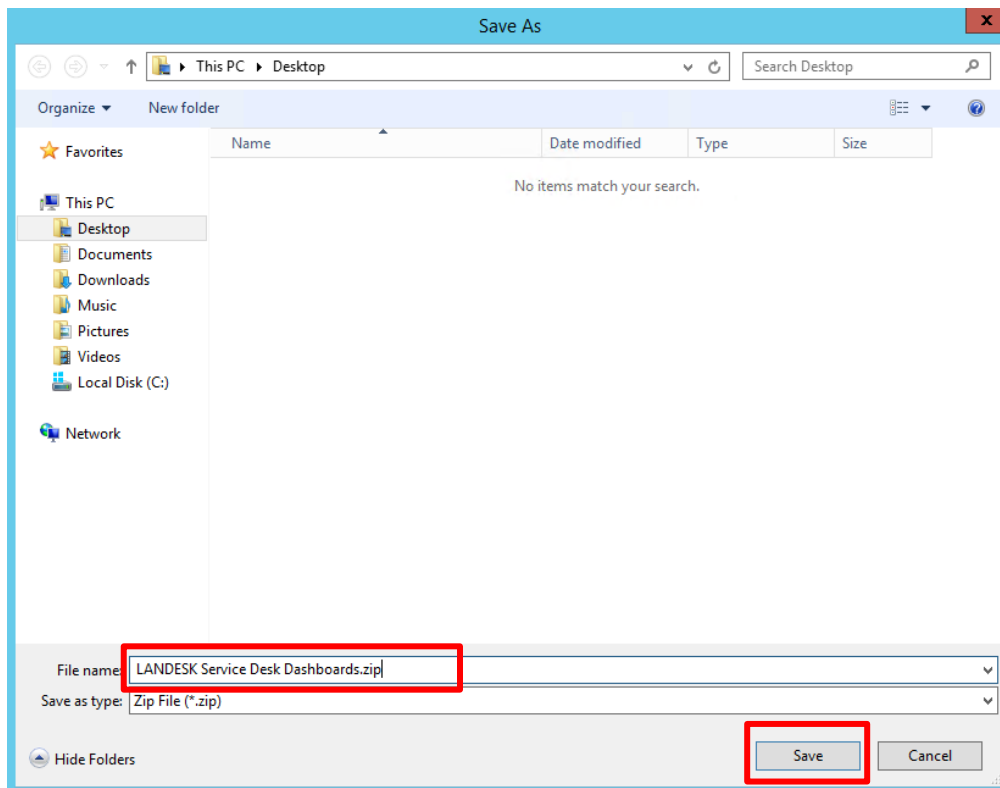


2. Click the **Export** button.

3.  The Export Options dialog opens. It contains important options to consider when exporting:

    - **Include Templates:** Some objects (such as documents) may have associated templates. Templates are located in the Xtraction Data directory Templates sub-folder. You can include or exclude templates in the export. When you export a document that has a template, the template is exported too.

    - **Include Images:** Some objects may contain image components. Images that aren't located on the Xtraction server, such as those accessed through a URL, cannot be exported. Server-based images are located in the Xtraction Data directory Images sub-folder. You can include or exclude images in the export. When you export a document that has an image component, the image is exported too.

    - **Exclude Inactive Owner:** Select this option so that items belonging to an inactive owner will not be available for selection. You can still see inactive owners in the tree as grayed text and without a checkbox. Changing this setting will cause the tree view to be rebuilt.
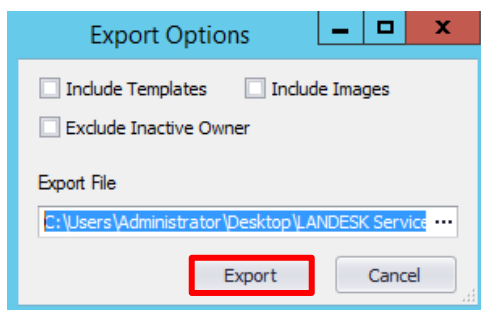
Verify the export options selected and click the ellipsis button to choose where to save the exported content.
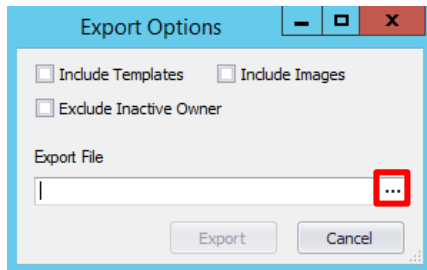
4. Enter a name for the zip file, then click **Save**.



5. Click **Export** to begin the export process or **Cancel** to abort.

# Importing folders, filters, dashboards, documents, and reports

This process takes a zip file as input. The zip file must be in the format created in the export process.

1. Select a folder by clicking the folder name. This is where you'll put the folders, filters, dashboards, documents, and reports. Click the **Import** button.
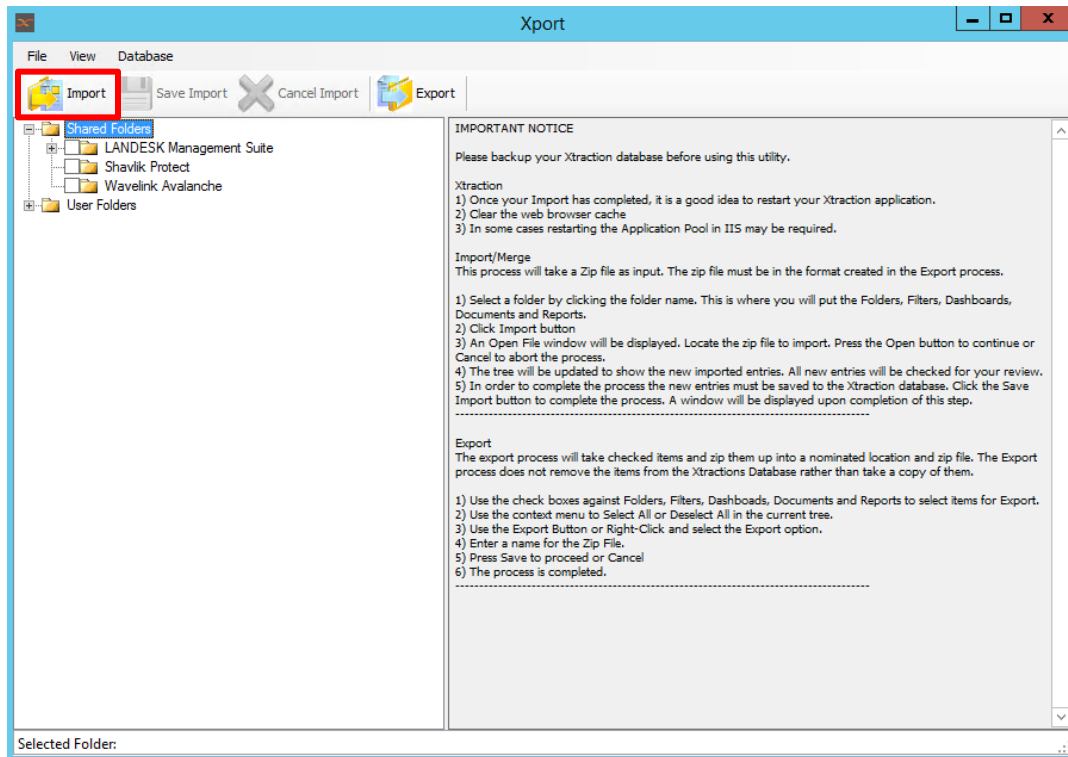


2. The Import Options dialog opens. It contains important options to consider when importing:
   - **Templates:** Some objects (such as documents) may have associated templates. Templates are located in the Xtraction Data directory Templates sub-folder. During the import, you can choose to include templates. When the document is imported, the template will be created in the Xtraction Data directory Templates sub-folder. You can choose to replace a template if it already exists in the Templates folder, or you can leave it and not import the incoming template.
   - **Images:** Some objects may contain image components. Images that aren't located on the Xtraction server, such as those accessed through a URL, cannot be exported. Server-based images are located in the Xtraction Data directory Images sub-folder. During the import, you can choose to include images. When the document is imported, the image will be created in the Xtraction Data directory Images sub-folder. You can choose to replace an

image if it already exists in the Images folder, or you can leave it and not import the incoming image.

- **Default Owner:** Only applicable to imports and will not affect exports. All objects (dashboards, documents, filters, etc.) are given an owner when created in Xtraction. The owner is a user account. When you perform an export, each object takes a reference to its owner. During the import, if the object's owner doesn't exist in the Xtraction database, then the object must be given a new owner; hence, the requirement for a default owner. The default owner is given to each imported object when the object's owner can't be found in the Xtraction database.

- **OOTB Import:** Select this option when importing OOTB content supplied with Xtraction

Verify the import options selected and click the ellipsis button to select a zip file to import.
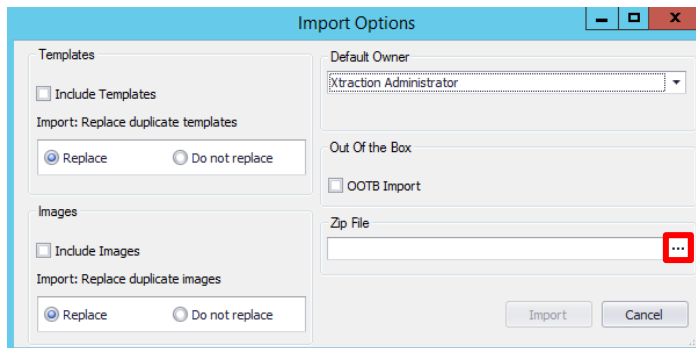


3.  An Open dialog displays. Locate the zip file to import.
4.  Click **Open** to continue or **Cancel** to abort the process.
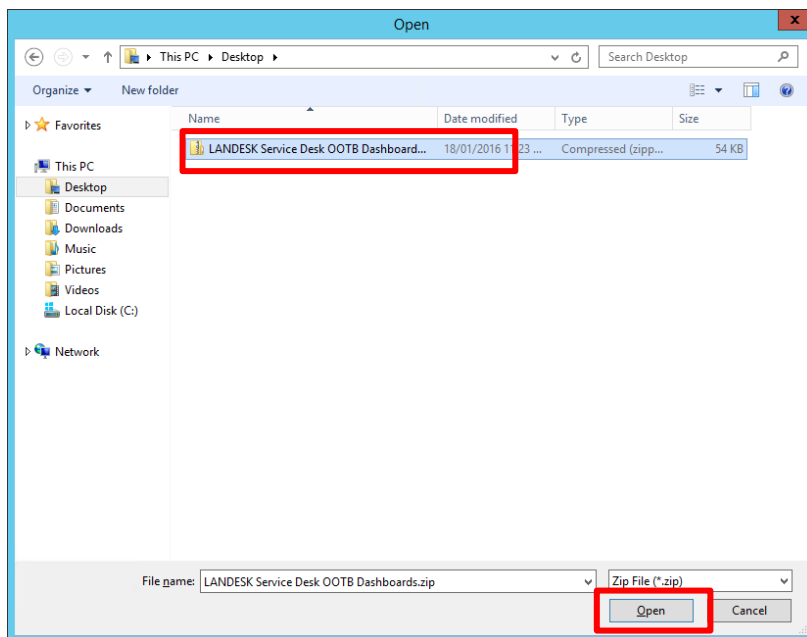
5. Click **Import** in the Import Options dialog to import the selected content.
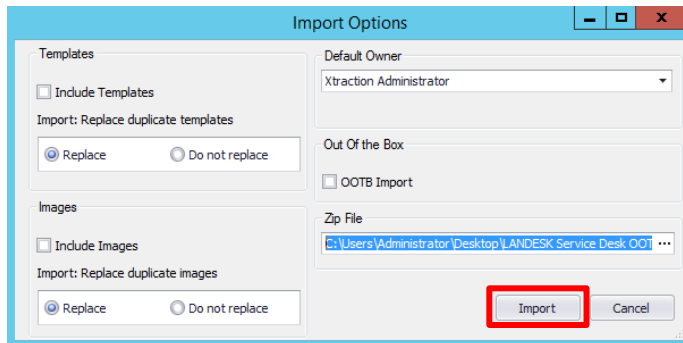


6. You'll notice the tree is updated to show the newly imported entries. All new entries are selected for you to review. Click **Save Import** to complete the import and save the entries in the Xtraction database.
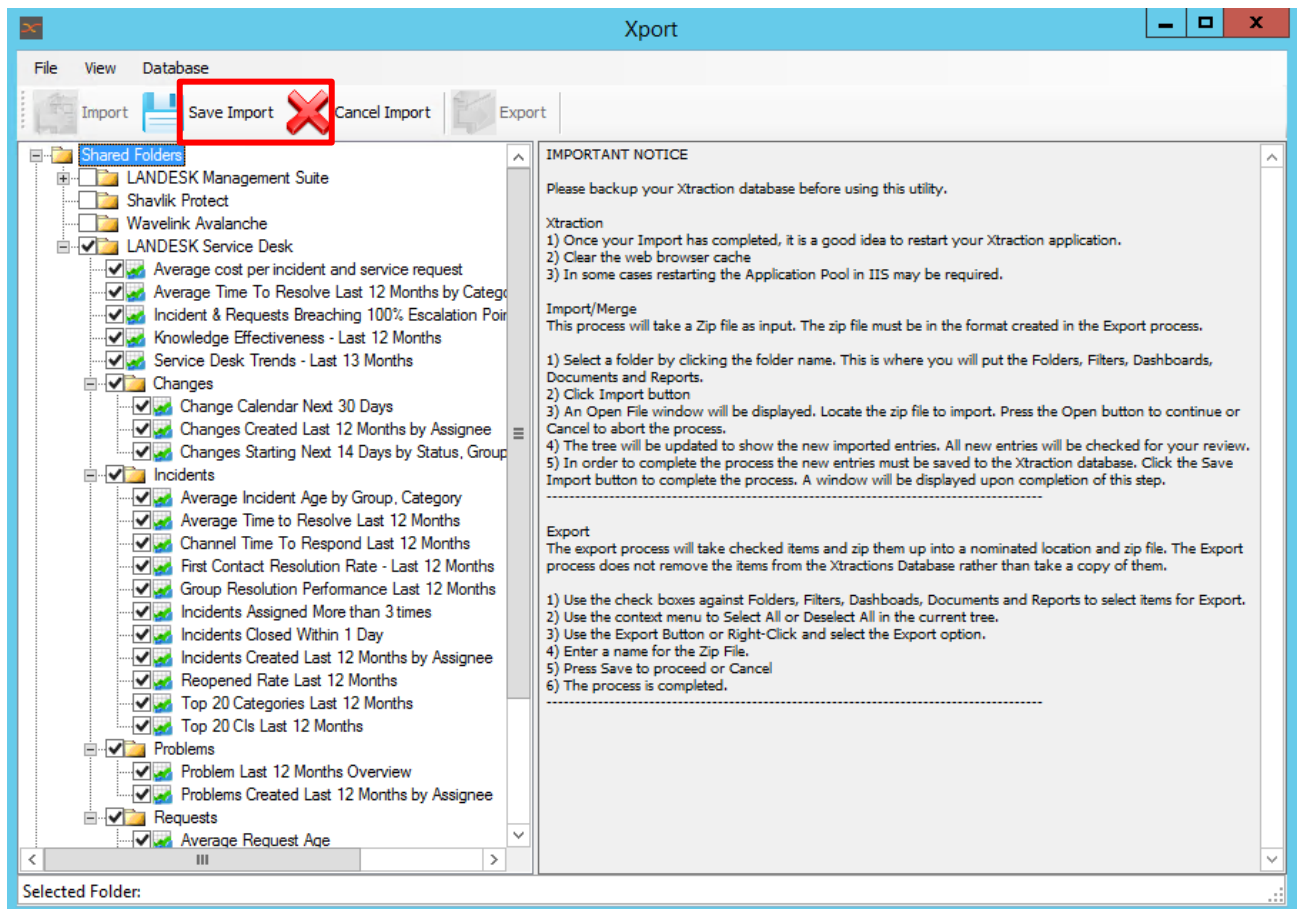
## Post-import tasks

- Once the import has completed, it's a good idea to restart your Xtraction application.
- Clear the web browser cache.
- Restart the Xtraction Task Manager service.
- In some cases, restarting the application pool in IIS may be required. To do so, follow this procedure:
  1. In **Internet Information Services (IIS) Manager > Administrative Tools**, expand the server folder.
  2. Select **Application Pools**.
  3. Right-click the **Xtraction Application Pool** and select **Stop**.
  4. Right-click the **Xtraction Application Pool** and select **Start**.

## Verify your import

Follow this procedure to verify the import worked correctly:

1. Open the Xtraction web-based interface.
2. Navigate to the new location of your item.
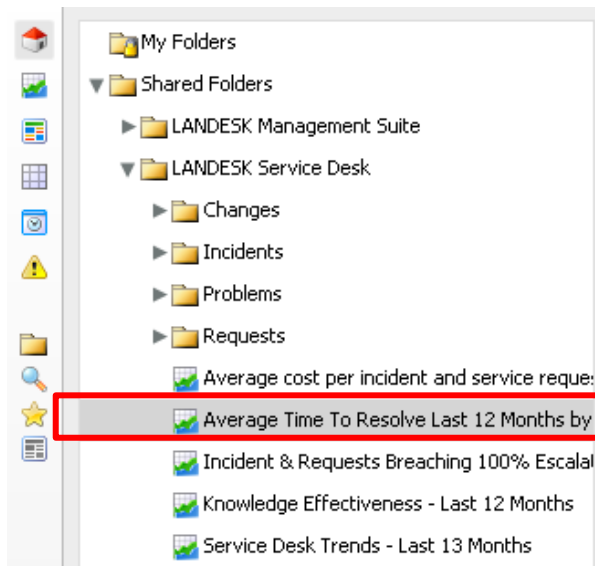


3. Open your item in Xtraction and verify that it works properly.
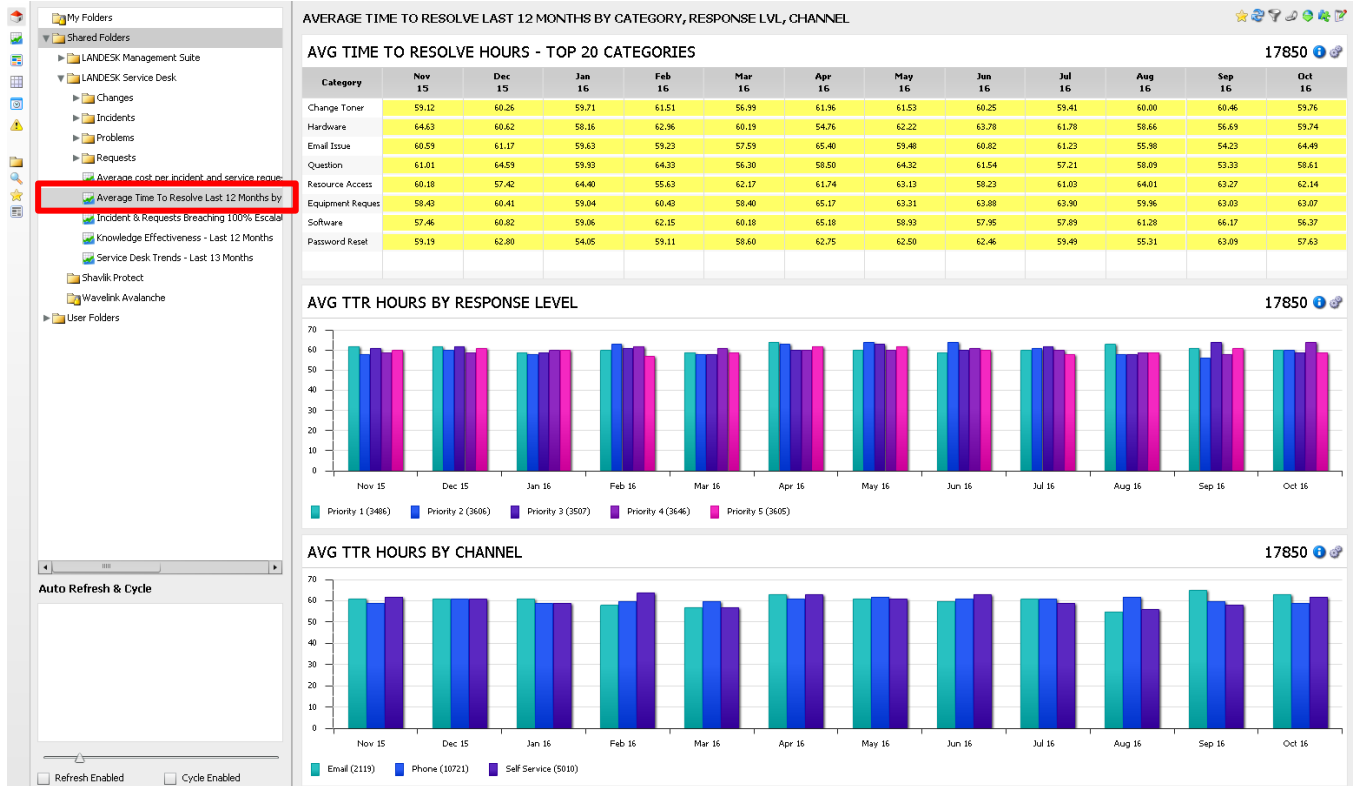
# Viewing the log file

Logs files are located in the directory where the utility was installed (by default, C:\Program Files (x86)\Xtraction Software\Xtraction\Tools). There may be more than one log file in this directory. The naming convention is as follows: XportLog_yyyymmdd.txt (where yyyymmdd = year, month, day).
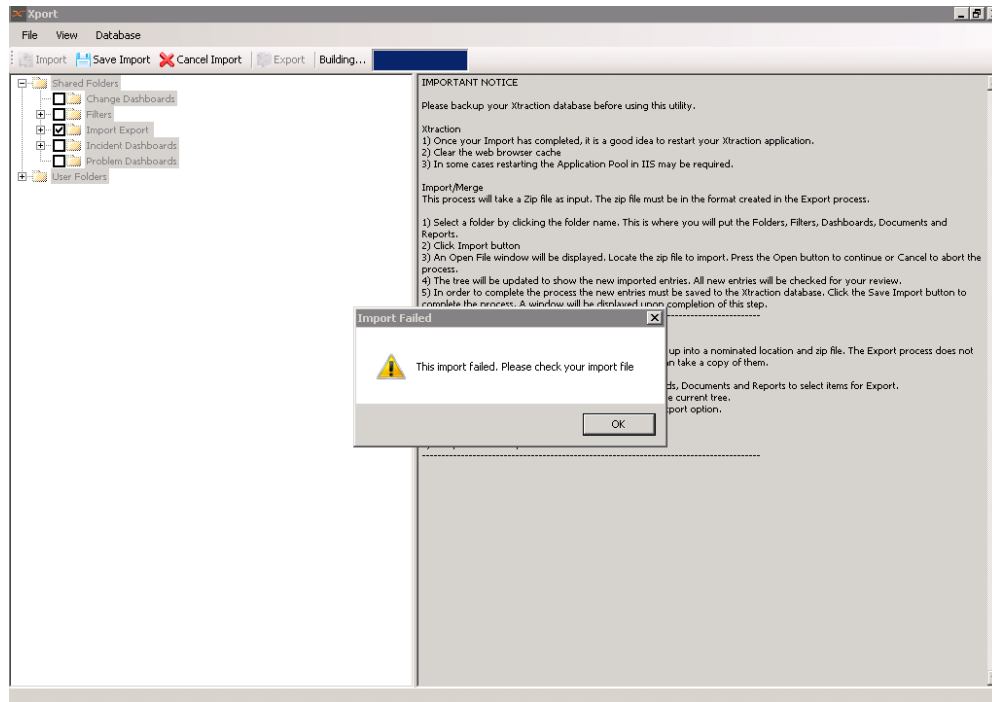
# Potential errors

When importing items, if you click one of the item check boxes instead of just highlighting it, you may receive the following error:
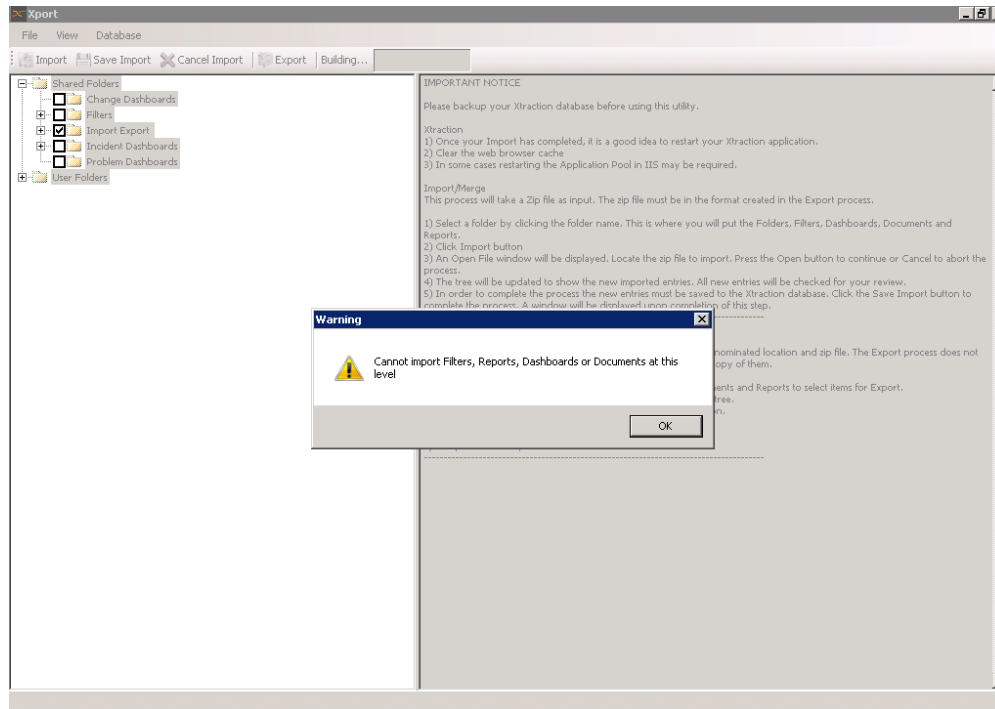


Clicking **OK** above will bring up another message:

Click **OK** above. You need to click **Cancel Import** at this time to continue. Just go back and highlight the item instead of clicking in the check box.