# DATA TRANSFER

**Version 2.0.1**

**Wednesday, June 3, 2020**

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# Data Transfer Overview

The e-ISuite system is comprised of two versions: Enterprise and Site. In general, Enterprise will be used to manage local incidents, and Site will be used when an IMT is sent to a remote site.

All incident data generated in Site will eventually be transferred to Enterprise so there is a record of all incidents in Enterprise.

Data transfers will occur when an incident was initially managed in Enterprise, but has increased in size and complexity, so it is necessary to turn the management of the incident over to an IMT. If the IMT establishes an incident base, the incident can be transitioned to Site via a Transition File. This process will lock the incident in Enterprise and transfer all data and management of the incident to Site. At the close of the incident being managed by the IMT, the incident data can be transitioned back to Enterprise.

The term Transition refers to the process of turning over the control of an Incident from Enterprise to Site or from Site to Enterprise.
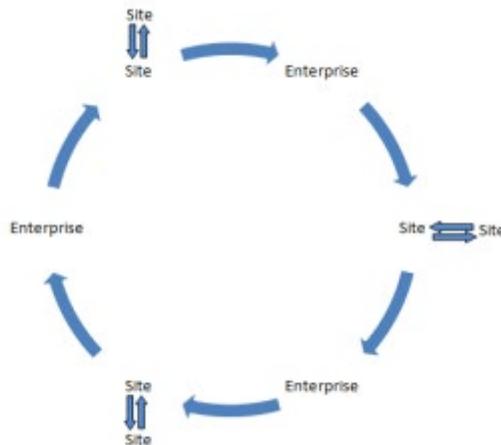


This section includes information for the following areas:

- [Transition an Incident from Enterprise to Site](#)
- [Transition an Incident from Site to Enterprise](#)
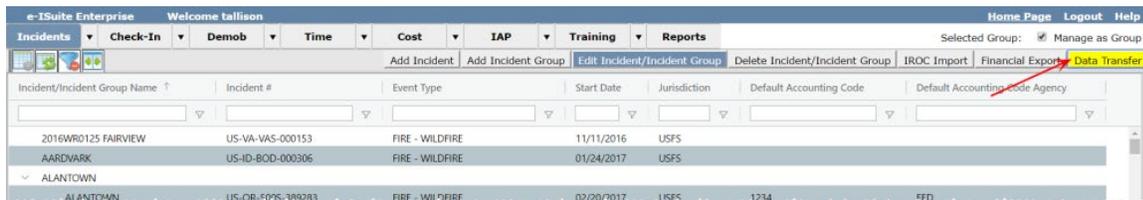- [Site to Site Data Transfer](#)

# Transition Incident from Enterprise to Site

Follow these steps to transition an incident being managed in an office with Enterprise to an IMT at a remote site:

NOTE:  A Data Steward in Enterprise can only transition those Incidents/Incident Groups to which they have access.

1.  Login to Enterprise as a Data Steward.

2.  On the Home page, select the **Incidents** button.

3.  Select the **Data Transfer** button.



4.  On the Data Transfer page, select the **Create Enterprise Transition File** tab.

5.  Select an Incident or Incident Group in the grid on the left side of the page to transition to the site.

6.  The system auto-populates the **Transition File Name** field with the Incident/ Incident Group name. If needed, change the name.

7.  Enter the **Password** for the Transition file.

8.  Enter the password a second time in the **Verify Password** field to verify the password for the Transition file.

9.  Click the **Create Transition File** button.

NOTE:  Depending on the size of the incident, this process may take several minutes, because the system is copying all data from the incident to a file.

10.  When the file is successfully created a message will display.

11.  Click the **OK** button to continue.

12. The Transition File will display in the Transition File grid at the bottom of the screen.

13. The Incident or Incident Group that was included in the Transition File will then be locked.

NOTE: The Incident or Incident Group will still display in the Incident lists in Enterprise, but the user will not be able to make any changes to the data.

NOTE: When an Incident Group is locked, all incidents within that Incident Group are also locked.
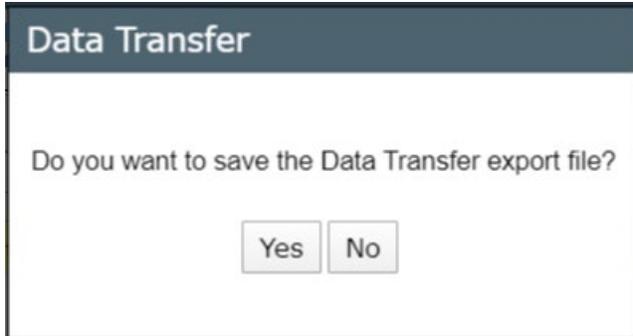


# Copy a Transition File

1. Select the transition file in the grid at the bottom of the **Create Enterprise Transition File** tab.

2. Click the **Copy File** button to copy the Transition File to a portable device.

3. A confirmation window displays. Click **Yes** or **No** to confirm saving of the Data Transfer Export File.

**Data Transfer**

Do you want to save the Data Transfer export file?

Yes   No

4. When the **Export File** window opens, the system automatically inserts the Transition File Name into the field and adds **ent-to-site** to the end of the file name. If needed, the name can be changed in this field.

**Export File**

apple valley_ent-to-site

Save   Cancel
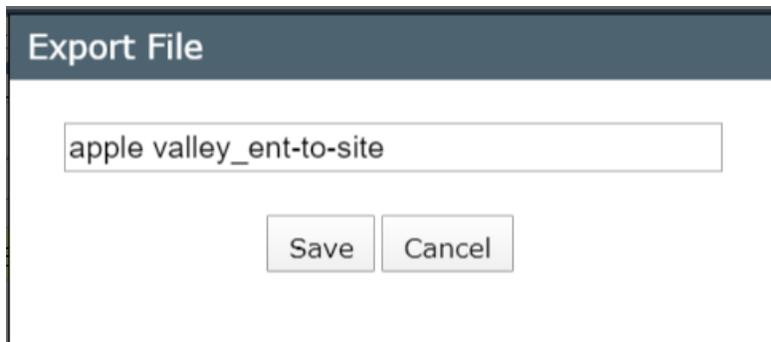
5. When the file browser window opens, navigate to the area where the Transition File is to be saved.

NOTE:   If the file browser window does not open, the system will automatically save the file to the Downloads folder on your computer.
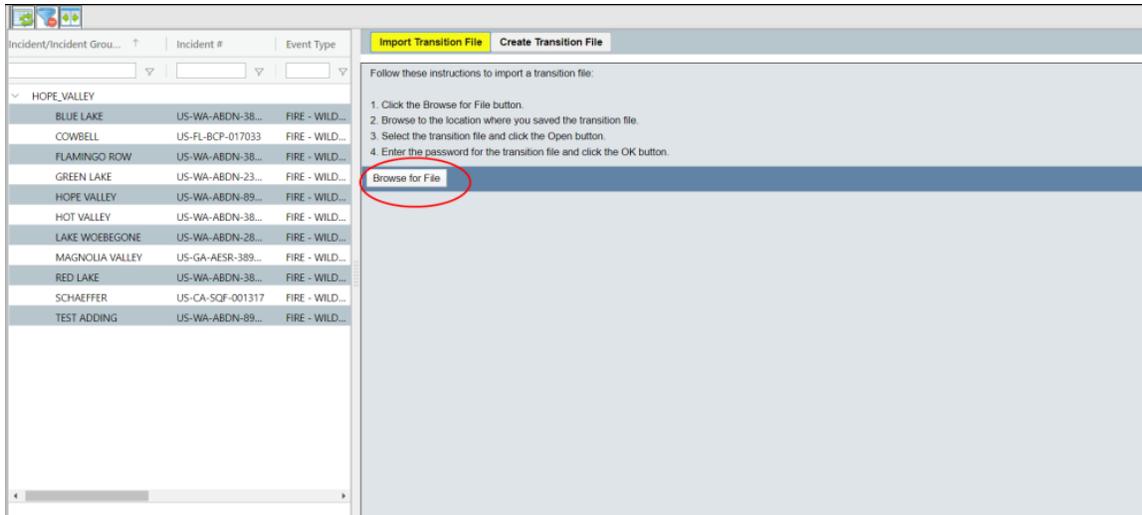
6. Click the **Save** button.

# Import a Data Transfer File to Site

1. Log into Site.

2. On the Home page, select the **Incidents** button.

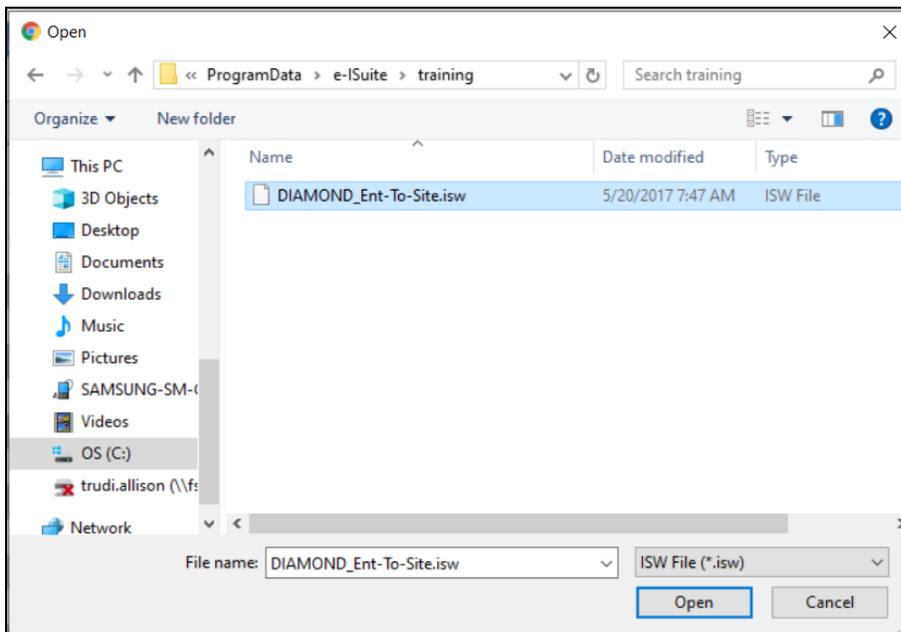3. Select the **Data Transfer** button.

# Data Transfer

4.  Click the **Import Transition File** tab.

5.  Click the **Browse for File** button.



6.  Browse to the file location of the Transition File.

7.  Select the Transition File.

8.  Click the **Open** button.



9.  Enter the password for the Transition File.

10. Click the **OK** button to import all of the data for the Incident or Incident Group to Site from the Transition File.



**Data Transfer File Password**

Enter the password for the transition file and click the OK button.

Password * ••••••••••••

[ OK ] [ Cancel ]

11. Once the import process is complete, the Incident or Incident Group will display in the list of Incidents.

NOTE:  If the Incident does not display in the Incidents grid, click the **Refresh** button to refresh the page.

# Unlock a Locked Incident on Enterprise

1. Log into Enterprise with a Data Steward account.

2. On the Home page, select the **Incidents** button.

3. On the Incidents screen, select the **Data Transfer** button.

4. Click the **Create Enterprise Transition File** tab.

5. Select the incident you want to unlock in the **Incident/Incident Group** grid.

6. Click the **Unlock Incident** button.

NOTE:  When an Incident Group is unlocked, all incidents within that Incident Group are also unlocked.
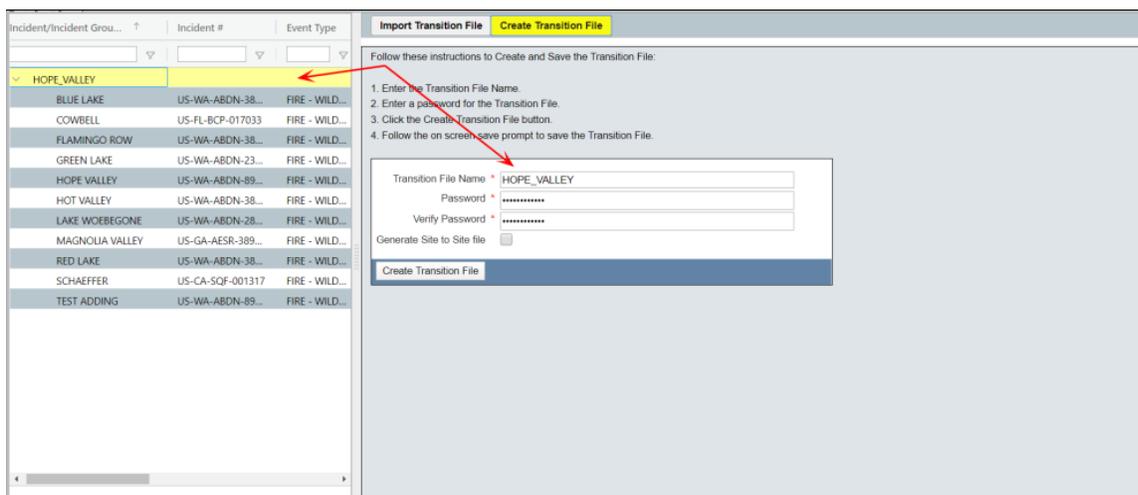
# Transition Incident from Site to Enterprise

Follow these steps to transition an incident from Site to Enterprise:

1. Log into Site.

2. On the Home page, select the **Incidents** button.

3. Select the **Data Transfer** button

4. Select the **Create Transition File** tab.

5. Select the **Site Group** in the Incident/Incident Group grid.

NOTE:  You cannot create a Site Transition file for a single incident. The transition file will include all incidents in the Site group.

6. Enter a **Transition File Name**.

7. Enter a **Password** for the Transition File.

8. Enter the password a second time into the **Verify Password** field to verify the password is correct.

9. Leave the **Generate Site to Site** checkbox unchecked.

10. Click the **Create Transition File** button.



11. When the confirmation message displays, click the **Yes** button.

**Data Transfer**
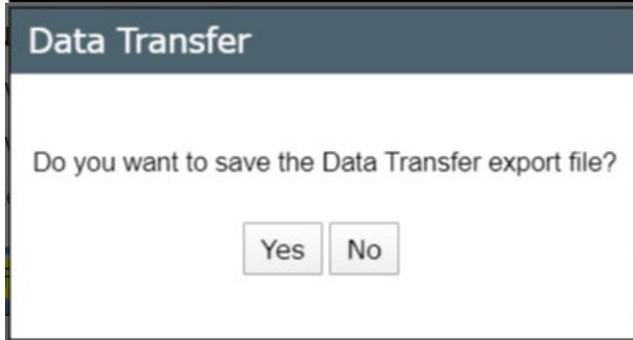
Do you want to save the Data Transfer export file?

Yes   No

12. When the **Export File** window opens, the system automatically inserts the Transition File Name into the field and adds **_site-to-ent** to the end of the file name. If needed, the name change be changed in this field.

**Export File**

hope_valley_site-to-ent

Save   Cancel
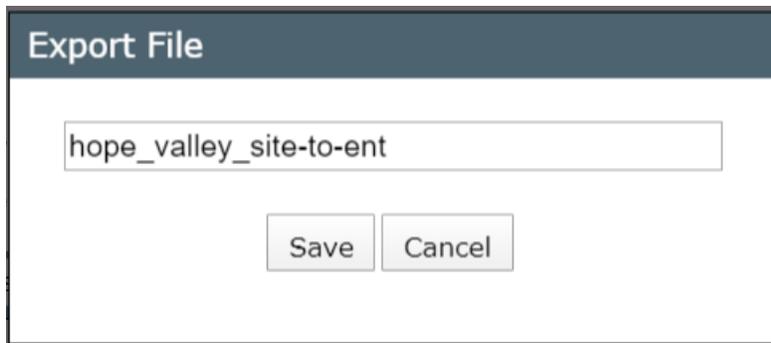
13. Click the **Save** button to continue.

14. In the file browser window that opens, navigate to the directory where the data transfer file will be saved and click the **Save** button.

NOTE:   If the file browser window does not open, the system will automatically save the file to the Downloads folder on your computer.

15. Log into Enterprise with a Data Steward account.

16. On the Home page, select the **Incidents** button.

17. Select the **Data Transfer** button.

18. Click the **Import Site Transition File** tab.

19. Click the **Import Transition File** button.

**Data Transfer**
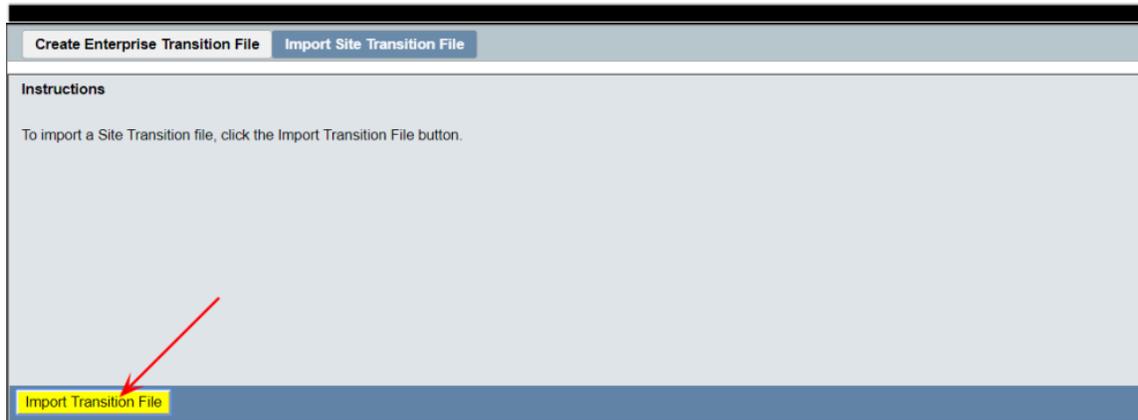
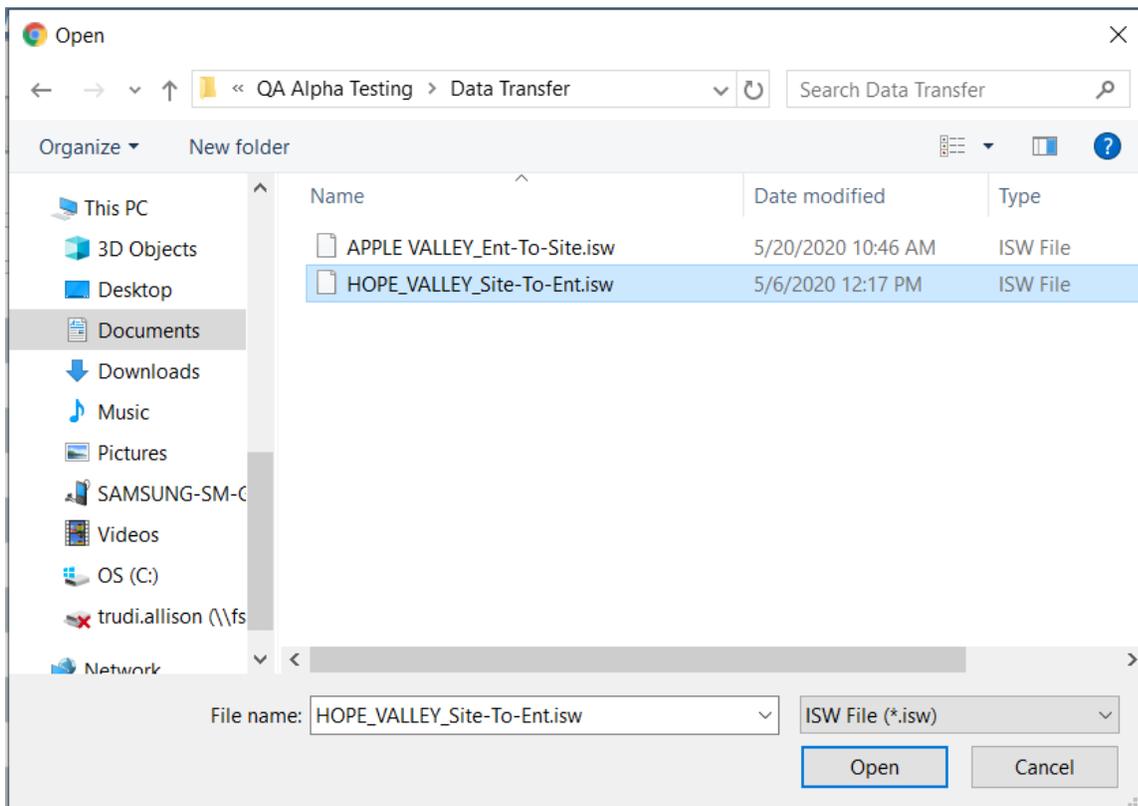20. In the browser window that opens, navigate to the location of the Transition File.

21. Select the Transition File, and click the **Open** button.



22. Enter the password for the data transfer file, and click the **OK** button.

# Data Transfer

**Data Transfer File Password**

Enter the password for the transition file and click the OK button.

Password * ••••••••••••

[OK] Cancel

23. Select a Data Steward to assign to the Incident or Incident Group, and click the **Continue** button.

NOTE: If the Data Steward transitioning the incident to Enterprise will continue to manage the incident in Enterprise, they will need to select their own user account from the Data Steward list that displays.

**Select Data Steward User**

Select the Enterprise Data Steward User.

| Login Name | First Name | Last Name |
|---|---|---|
| jdoe | JOHN | DOE |
| jdoe1 | JOHN | DOE |
| jdoe2 | JOHN | DOE |

Continue   Cancel

24. An Importing File message displays until the data is imported

**Data Transfer**

Importing File ...

NOTE: When importing a Site Group into the enterprise system for the first time, the system will require you to enter a name to assign to the Incident Group in the enterprise system.

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25.  If the Incident/Incident Group exists in Enterprise, the system unlocks the Incident or Incident Group.

26.  If the Incident/Incident Group did not previously exist in Enterprise, the system adds the Incident/Incident Group to Enterprise.

# Site to Site Data Transfer File

Follow these steps to create a site data transfer file that can be imported into a different site database:

1.  Log into Site.

2.  From the Home page select the **Incidents** button.

3.  Select the **Data Transfer** button

4.  Select the **Create Transition File** tab.

5.  Select the **Site Group** in the Incident/Incident Group grid.

NOTE:  You cannot create a site to site data transfer file for a single incident. The data transfer file will include all incidents in the Site group.

6.  Enter a **Transition File Name**.

7.  Enter a **Password** for the Transition File.

8.  Enter the password a second time into the **Verify Password** field to verify the password is correct.

9. Check the **Generate Site to Site** checkbox.

10. Click the **Create Transition File** button.



11. When the confirmation message displays, click the **Yes** button.



12. When the **Export File** window opens, the system automatically inserts the Transition File Name into the field and adds **_site-to-site** to the end of the file name. If needed, the name can be changed in this field.



13. Click the **Save** button to continue.

# ![e-ISuite] Data Transfer

14. In the file browser window that opens, navigate to the directory where the data transfer file will be saved and click the **Save** button.

NOTE: If the file browser window does not open, the system will automatically save the file to the Downloads folder on your computer.

15. Log into the Site database into which the site data transfer file will be imported.

16. From the Home page, select the **Incidents** button.

17. Select the **Data Transfer** button.

18. Click the **Import Transition File** tab.

19. Click the **Browse for File** button.
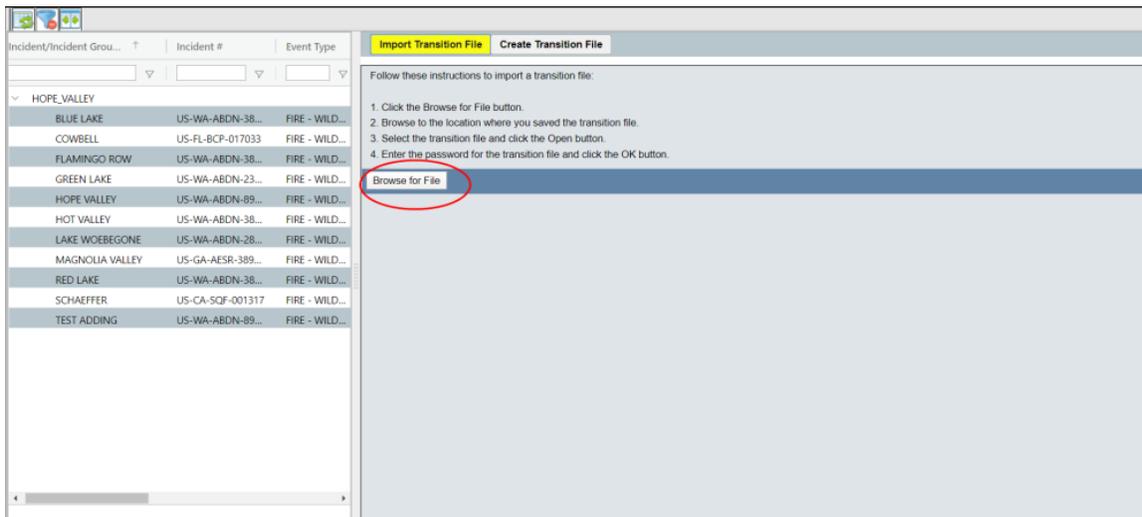


20. Browse to the file location of the Transition File.

21. Select the site to site data transfer file.
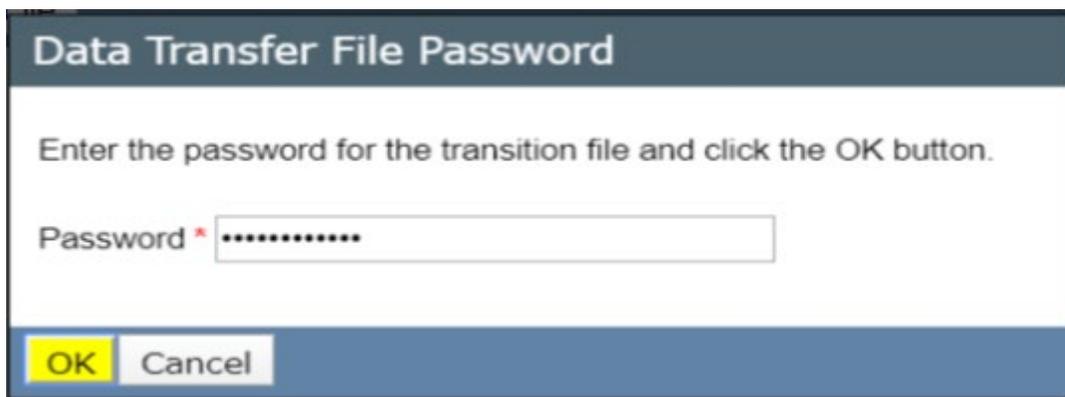
22. Click the **Open** button.
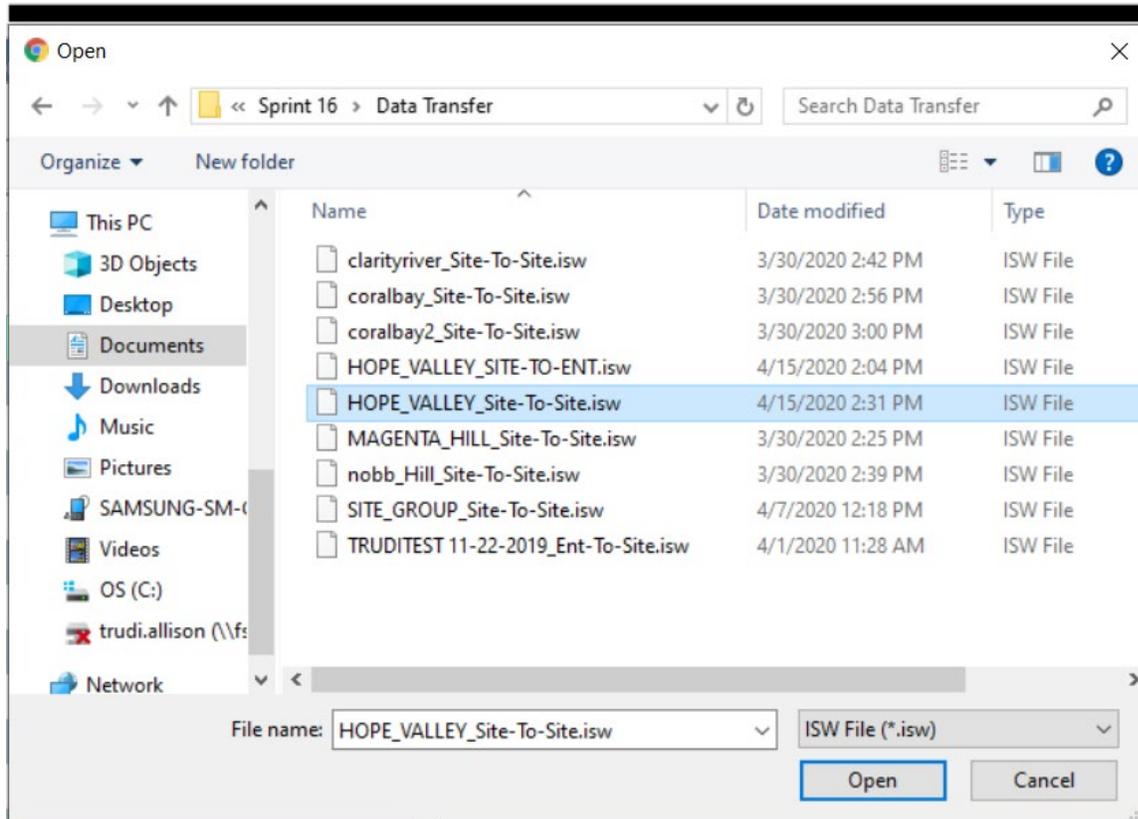
23. Enter the password for the site to site data transfer file.

24. Click the **OK** button to import the site to site data transfer file.



25. Once the import process is complete, the Incident or Site Group will display in the list of Incidents.

NOTE:  If the Incident does not display in the Incidents grid, click the **Refresh** button to refresh the page.

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