

SmartMigrator
Office Merge
User Guide

SmartOffice®



Copyright 1998-2006, E-Z Data, Inc.

All Rights Reserved.

No part of this documentation may be copied, reproduced, or translated in any form without the prior written consent of E-Z Data, Inc.

All product names are trademarks of their respective manufacturers or organizations.



918 E. Green Street

Pasadena, CA 91106

Web -<http://www.ez-data.com>

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

Table of Contents

Introduction	1
Important Considerations Prior to Beginning an Office Merge	1
Data Source Setup	2
Schema Consistency Check.....	2
Backup the Target Office	3
Record Count Comparison	4
Office Merge	5
Console.....	8
Check Data Integrity through SmartOffice	8

Introduction

This document provides an overview of Office Merge. Office Merge is used to merge records from one office to another and can also be used for data recovery.

The seven steps of Office Merge:

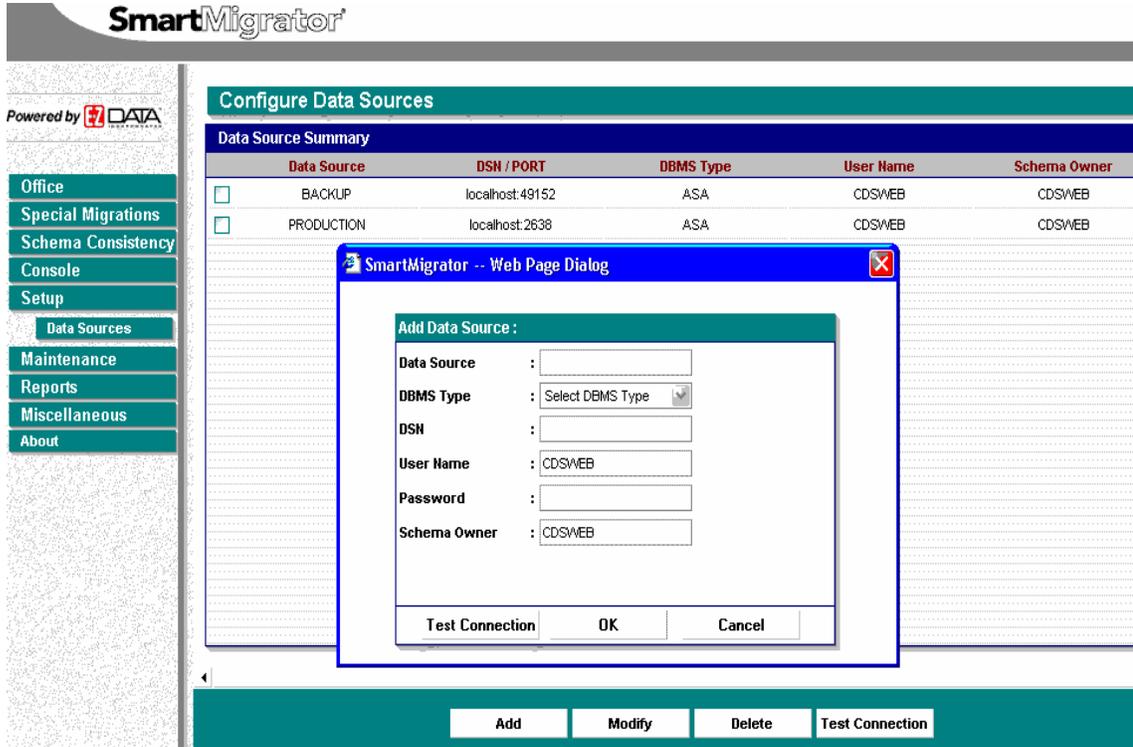
1. Backup the production database.
2. Add the Data Source of the production database to SmartMigrator.
3. Run a Schema Consistency Check on the production database to make certain that the database schemas are identical.
4. Backup the Target office.
5. Run Office Merge.
6. Run a Record Count Comparison.
7. Check the status of the data after the merge.

Important Considerations Prior to Beginning an Office Merge

- Make certain that the number of unused licenses for the Target office is equivalent to or exceeds the number of licenses being merged from the Source office. For example, if the Source office has five licenses, make certain that the Target office still has five or more unused licenses.
- Office Merge only checks for duplicate carrier and product records when enabled. It does not check for other duplicate records. It inserts the records from the Source office to the Target office, so there could be duplicate records. For duplicate user names it will insert the Login Names with the Office Name at the end (i.e., admin_LosAngeles) and all the records assigned to this user.
 - To clean up the duplicate contact records, generate the Duplicate Contacts Report from SmartOffice and then run a Contact Merge if necessary; or, delete the unwanted record.
 - For duplicate user names, reassign the contact records to the appropriate user from the Contact Summary by filtering contact records by Created By name, tagging the appropriate contacts and then selecting **Mass Assignment** from the expanded **More Features** menu.

Data Source Setup

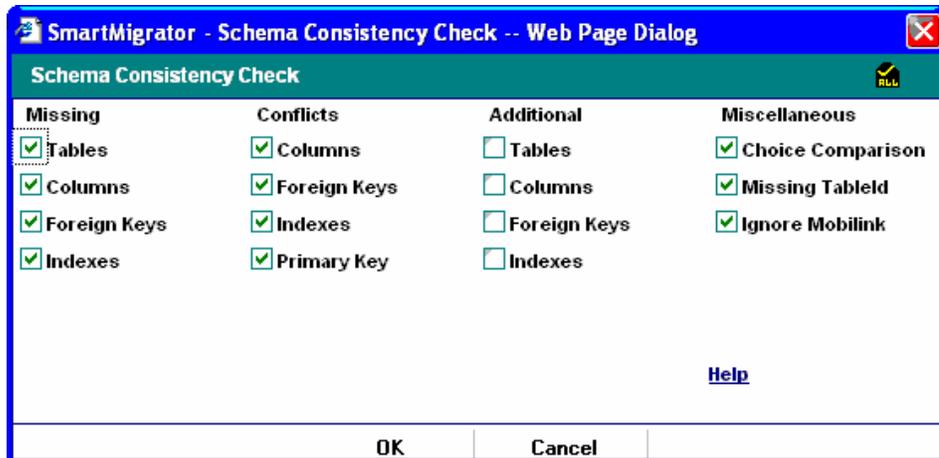
1. After backing up the production database, select **Data Sources** from the expanded **Setup** menu.
2. From the Configure Data Source dialog box, click the **Add** button.



Schema Consistency Check

It is advisable to run a Schema Consistency Check prior to running office duplication to make certain that the schema file within the SmartMigrator application is in sync with the actual database schema.

1. Click the **Schema Consistency** menu item.
2. Select the production database and then click **Check** to display the Schema Consistency dialog box.



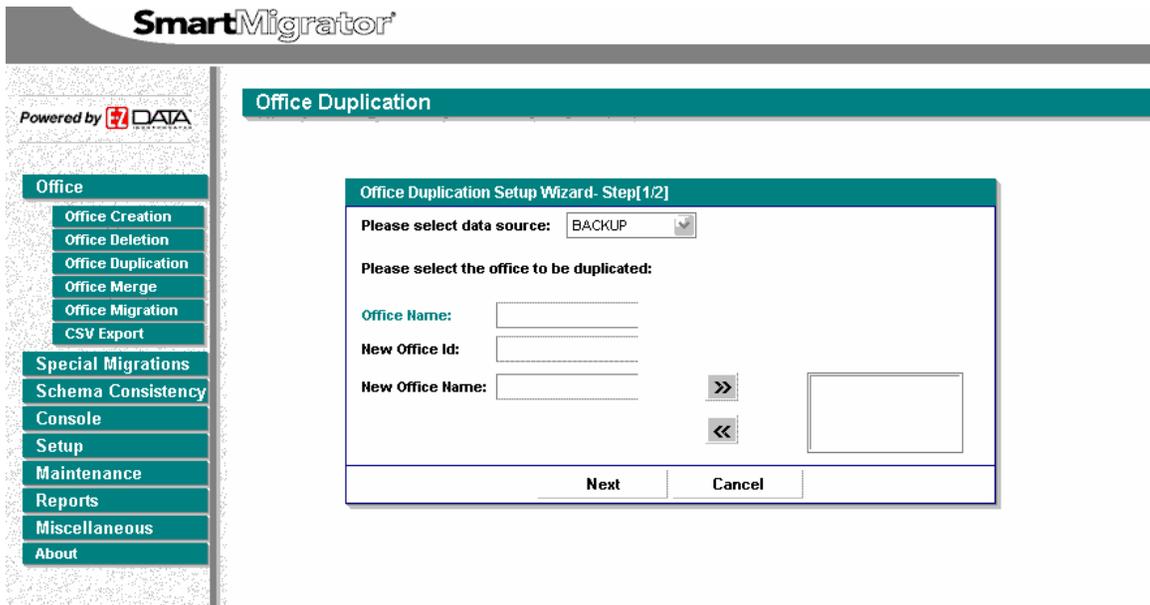
3. Use the default settings and then click the **OK** button.

When processing is done, a report will be generated. Make certain that there are no differences found. If differences are found, please contact the Project Manager.

Backup the Target Office

Backup the Target office prior to starting the merge process by using Office Duplication. If there are issues found after the Office Merge process, the Target office can be restored.

1. Select **Office Duplication** from the expanded **Office** menu.
2. As the Search Criteria, select the Target office and then create a duplicate of that office called Backup.
3. Click **Next** and then click **Create** to continue the Office Duplication.

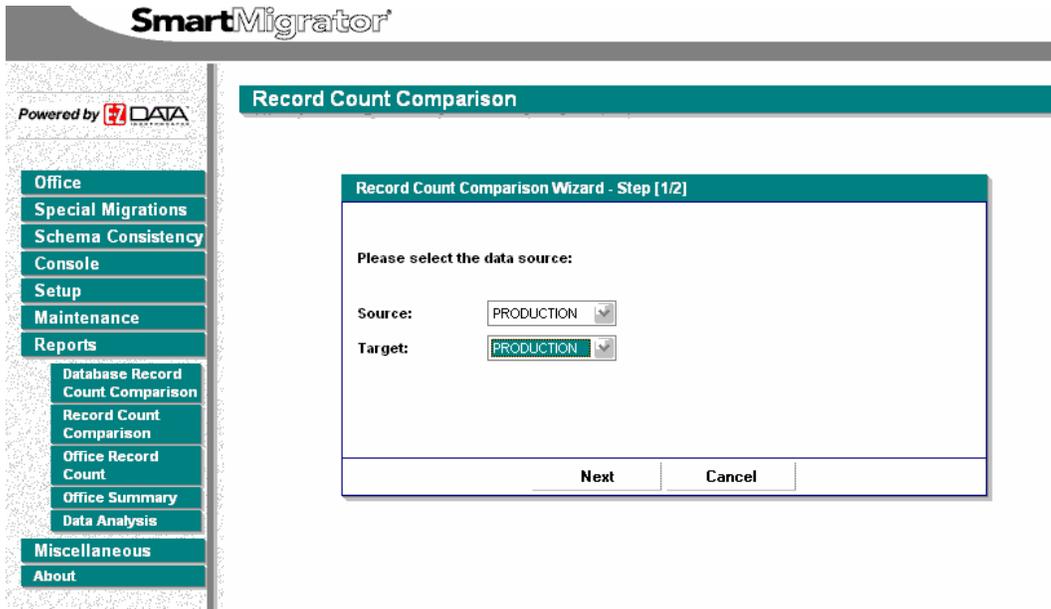


4. After the Target office is duplicated, run a Record Count Comparison to check if all the data has been duplicated correctly.
5. If there are any differences on the record count, contact the Project Manager.

Record Count Comparison

Once the office duplication is completed, run the Record Count Comparison report.

1. Select **Record Count Comparison** from the expanded **Reports** menu.
2. From the Record Count Wizard – Step 1/2 dialog box, select the appropriate databases and then click **Next**.

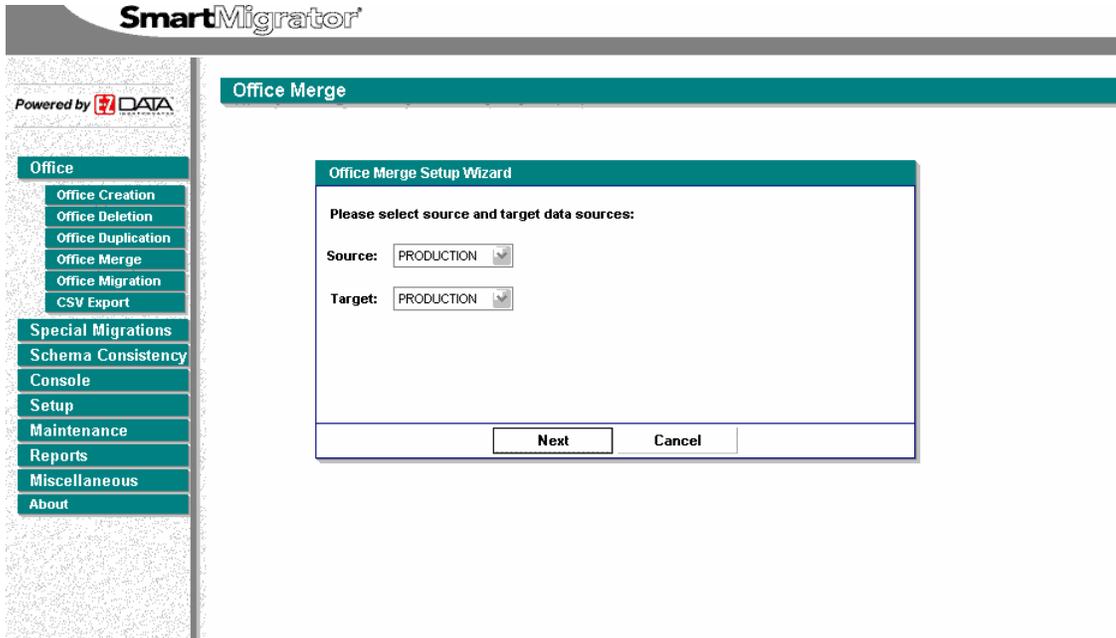


3. From the Record Count Wizard – Step 2/2 dialog box, enter the office name for both the Source (Backup) and Target (Production) sections and then click **Finish**.
4. Once the Record Count Comparison check is finished, click **Close** to display the report.
5. Select the **Show Conflicts Only** option to display any missing records.

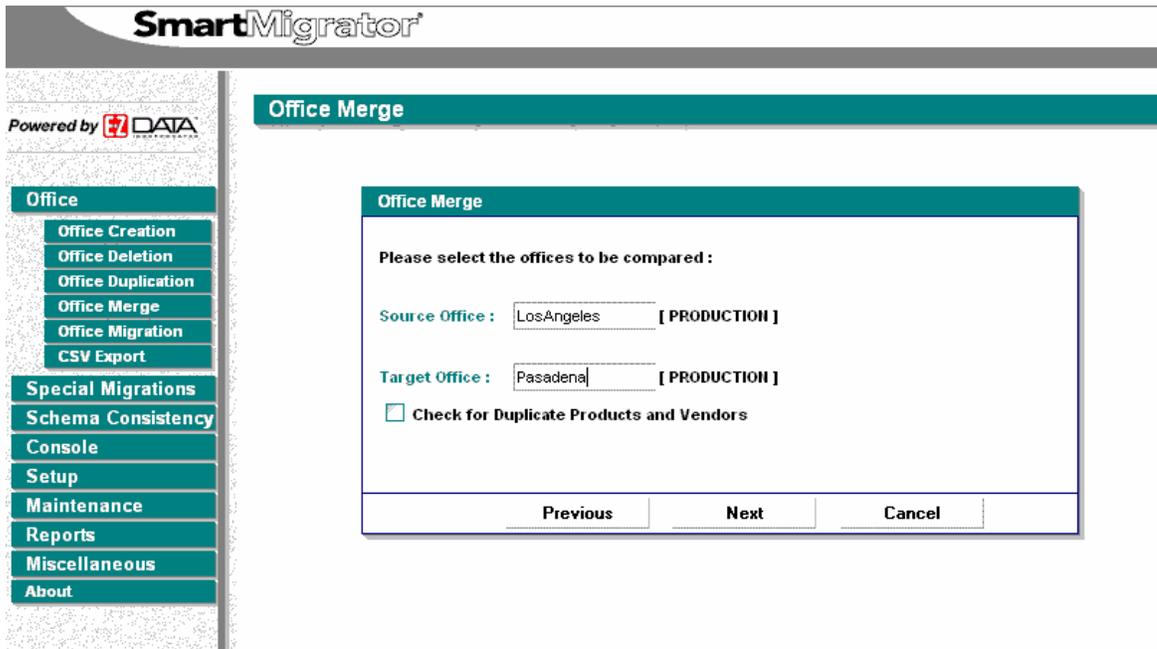
Record Count Comparison		
Record Count [Source:SOPROD,Target:SOPROD]		
	<input type="button" value="Show HTML Report"/> <input type="button" value="Show Conflicts Only"/>	
Table Name	Source Office: Corporate	Target Office: Pasadena
AAREPORT	0	0
ACCTMASTER	67	67
ACTHISTORY	760	760
ACTIONHELP	0	0
ACTIVITY	506	506
ACTROLLUP	0	0
ADDRESS	654	654
ADVCONTRACT	45	45
ADVISORREQ	0	0
AGENCYMANAGSETUP	0	0
AGENCYSETUP	1	1
AGENT	84	84
AGENTBRANDING	2	2
AGENTMANAGER	11	11
AGENTPAYOUTHDR	0	0
AGENTPAYOUTSTAGING	0	0
AGENTPRODSUMMARY	12	12
AGENTREQHISTORY	2	2

Office Merge

1. Select **Office Merge** from the expanded **Office** menu to display the SmartMigrator Wizard-Step [1-3] dialog box.
2. Select the Production database and then click the **Next** button.

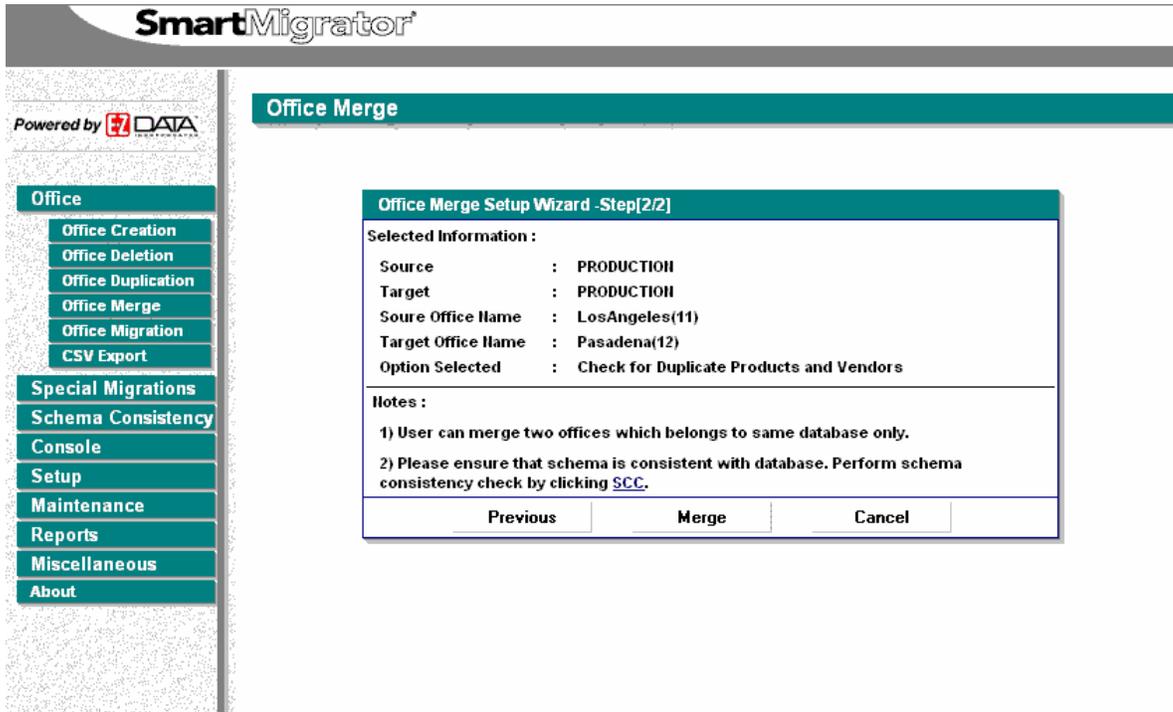


3. From the SmartMigrator Wizard- Step [2-3] dialog box, enter the name of the Source Office and then click the **Source Office** hyperlink.
4. Enter the name of the Target office and then click the **Source Office** hyperlink.

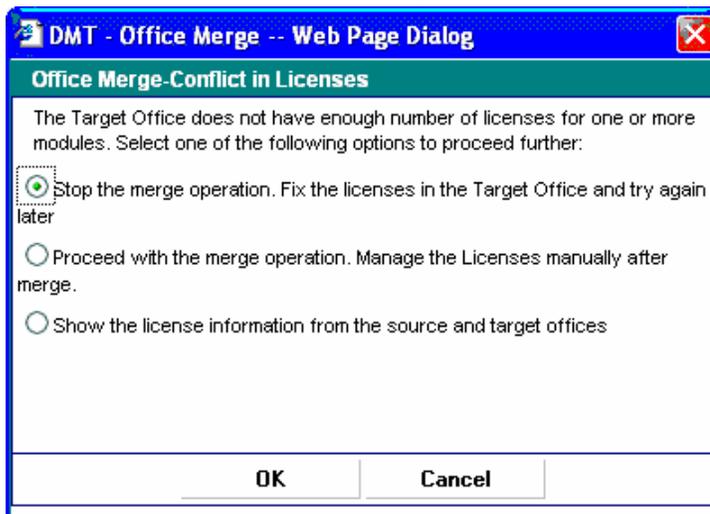


5. Select the **Check for Duplicate Products and Vendors** option to avoid duplicate product and vendor data and then click **Next** to continue.

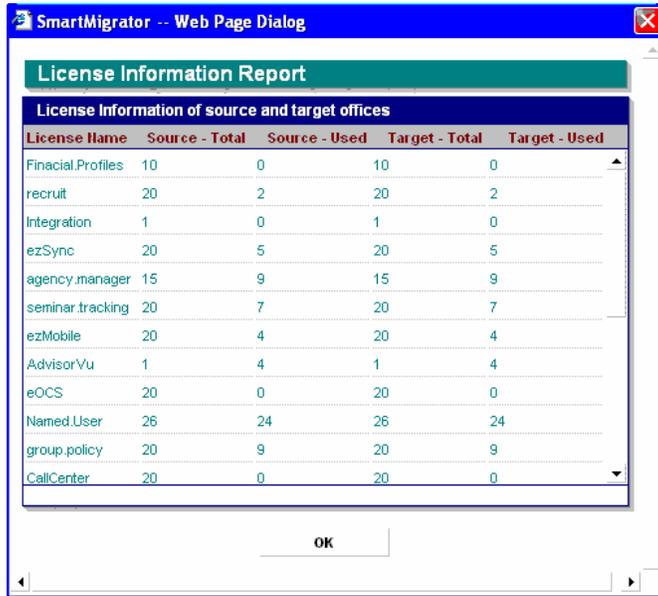
6. The criteria to Check for Duplicate Products and Vendors is as follows:
- **If duplicate Carriers and Products exist in the Target office**, none of the related data will be merged into the target office.
 - **If duplicate Carriers exist in the Target office but with different products**, only the products that are not on the target office and all its related data will be merged into the target office.
 - **If duplicate Products exist in the Target office but with different Carriers**, then it will merge the different Carrier and all its products to the target office.



7. From the Office Merge Setup Wizard -Step [3/3] dialog box, click **Merge** to continue.
8. If there are any license conflicts between the Source and Target offices, the Office Merge – Conflict in Licenses dialog box displays.



- **Stop the merge operation. Fix the licenses in the Target office and try again later.**
This can be performed by making certain you have enough licenses to support both offices. Please contact the Project Manager for more information.
- **Proceed with the merge operation. Manage the licenses manually after the merge.**
This will merge all the data from the Source to the Target but they cannot be viewed until the licenses are set up correctly.
- **Show the license information from the Source and Target offices.** This will display a report showing the license differences between the Source and Target offices.



The dialog box displays a table titled "License Information Report" with the subtitle "License Information of source and target offices". The table has five columns: License Name, Source - Total, Source - Used, Target - Total, and Target - Used. The data is as follows:

License Name	Source - Total	Source - Used	Target - Total	Target - Used
Finacial.Profiles	10	0	10	0
recruit	20	2	20	2
Integration	1	0	1	0
ezSync	20	5	20	5
agency.manager	15	9	15	9
seminar.tracking	20	7	20	7
ezMobile	20	4	20	4
AdvisorYu	1	4	1	4
eOCS	20	0	20	0
Named.User	26	24	26	24
group.policy	20	9	20	9
CallCenter	20	0	20	0

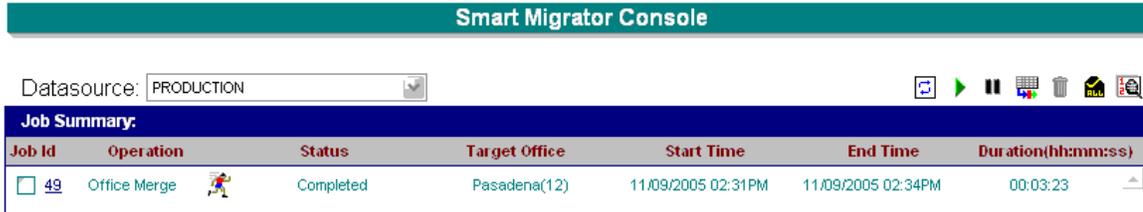
An "OK" button is located at the bottom center of the dialog box.

9. If there are no license conflicts between the two offices, the confirmation dialog box displays.



Console

1. To check the status of the Office Merge, select the **Console** menu item.
2. From the Job Summary list, check if the Status is set to **Completed**, then click the **Run Office Merge Report** button to display the status of Office Merge.
3. To see if there were any errors during the process, tag the appropriate Job ID and then click the **View Log** button.



The screenshot shows the 'Smart Migrator Console' interface. At the top, there is a teal header bar with the text 'Smart Migrator Console'. Below this, there is a 'Datasource:' dropdown menu set to 'PRODUCTION'. To the right of the dropdown are several icons: a play button, a pause button, a list icon, a trash can, a yellow warning icon, and a magnifying glass. Below these is a 'Job Summary:' section with a table. The table has the following columns: Job Id, Operation, Status, Target Office, Start Time, End Time, and Duration(hh:mm:ss). The table contains one row with the following data: Job Id: 49, Operation: Office Merge, Status: Completed, Target Office: Pasadena(12), Start Time: 11/09/2005 02:31PM, End Time: 11/09/2005 02:34PM, Duration: 00:03:23.

Job Id	Operation	Status	Target Office	Start Time	End Time	Duration(hh:mm:ss)
49	Office Merge	Completed	Pasadena(12)	11/09/2005 02:31PM	11/09/2005 02:34PM	00:03:23

Check Data Integrity through SmartOffice

Log in to the Target office through SmartOffice to check if the data from the Source office has been merged successfully. Check at least five records with Policy, Account, Activity, Letter, Document and SmartPad Note information to see if all the data has been merged. If any issues are found, contact the Project Manager.