

SmartMigrator  
Office Migration  
User Guide

# SmartOffice®



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## Introduction

This document provides an overview of Office Migration. Office Migration is used for data migration of office data from one database to another and is commonly used for data recovery and migration of a converted office to the main database server.

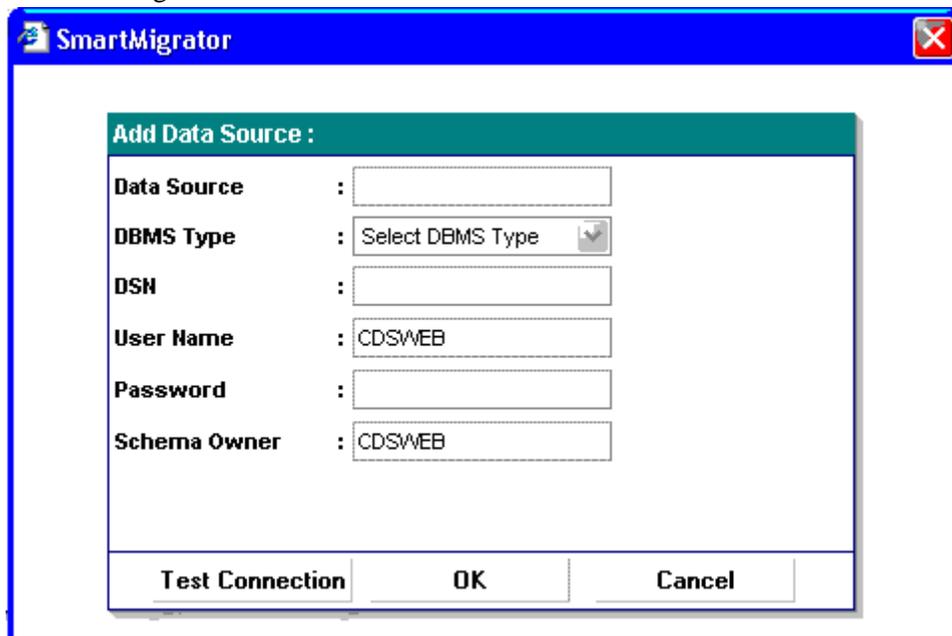
## Important Considerations Prior to Beginning an Office Migration

- Office Migration checks for an Office ID #; currently it will not continue the migration if the office being migrated already exists on the Target database.
- Make certain that if any of the offices are dependent upon the System Office, that the System Office is synchronized first.

We are working on redesigning both of these considerations for future versions.

## Data Source Setup

1. From the SmartMigrator home page, select **Data Sources** from the expanded **Setup** menu.
2. From the Configure Data Sources dialog box, click the **Add** button to display the Add Data Source dialog box.

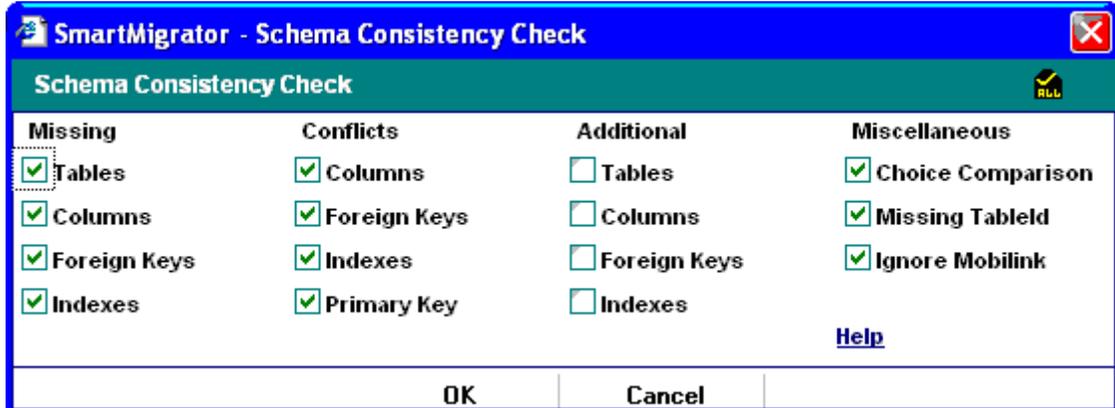


3. In the Data Source field, enter the Data Source name.
4. In the DBMS Type field, select the appropriate database type from the drop-down list.
5. In the DSN field, for Oracle and UDB, this will be the same as the Data Source; for ASA, enter the IP and Port of the location of the ASA DB.
6. In the User Name field, enter the User Name login assigned to connect to the database.
7. In the Password field, enter the Password assigned to connect to the database.
8. In the Schema Owner field, enter the Schema Owner assigned to connect to the database.
9. Once the required information has been entered, click the **Test Connection** button to make certain that SmartMigrator can connect to the production database.
10. Click the **OK** button to save the Data Source Configuration.

## 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.

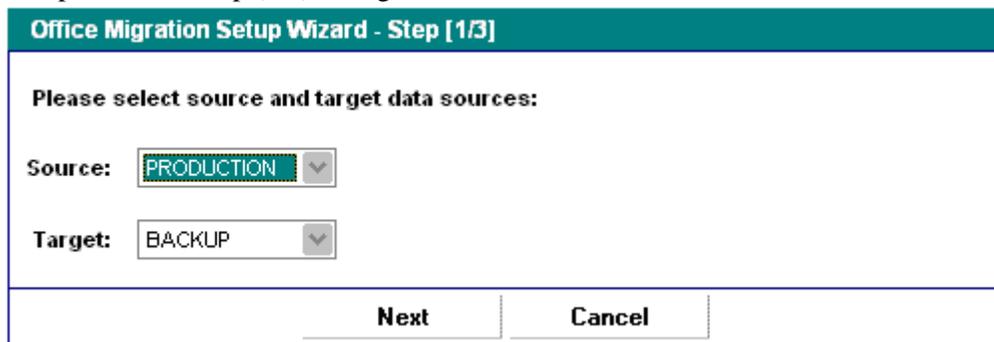
1. Click the **Schema Consistency** menu item.
2. Select the production database and then click **Check** to display the Schema Consistency Check dialog box.



3. Use the default settings and then click the **OK** button.
4. When processing is complete, a report is generated. Make certain that there are no differences found. If differences are found, please contact the appropriate Project Manager.

## Office Migration

1. Select **Office Migration** from the expanded **Office** menu.
2. Select the Production database and then click the **Next** button to display the Office Migration Setup Wizard – Step (1/3) dialog box.



3. Select the name of the Source database, specify the Target database and then click the **Next** button to open the SmartMigrator Wizard – Step (2/3) dialog box.

4. Change the name of the Office to be migrated from Production to **Backup**.
5. Click the **Office Name** hyperlink to add the office name to the List of Offices Selected section and then click the **Next** button to open the SmartMigrator Wizard - Step (3/3) dialog box.

**Office Migration Setup Wizard-Step[3/3]**

**Selected Information :**

Source Data Source : PRODUCTION  
 Target Data Source : BACKUP  
 Offices Selected : Corporate(66054)

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**Notes :**

1) Schema has to be consistent with Source and Target database for successful completion of this process. Please perform schema consistency check by clicking [Source](#) and [Target](#) to ensure the same.

2) Perform Data Analysis or Record Count Comparison after the completion of process to ensure that data are migrated properly.

Previous      Migrate      Cancel

6. Click the **Migrate** button to send the job to the Console.

## Console

1. To check the status of the Office Migration, select the **Console** menu item.
2. From the Job Summary list, check if the Status is set to Completed and then tag the job and click the **View Log** button to check for more details related to that job.
3. If no errors are found, the report will show as Status Completed; if errors are found, then it will list the possible errors.

**Smart Migrator Console**

Datasource: PRODUCTION

Job Id	Operation	Status	Target Office	Start Time	End Time	Duration(hh:mm:ss)
<input type="checkbox"/> 53	Office Migration	Completed	System(1)	11/02/2005 10:47PM	11/02/2005 11:08PM	00:21:09
<input type="checkbox"/> 54	Office Migration	Completed	East(67180)	11/02/2005 11:38PM	11/02/2005 11:43PM	00:04:39
<input type="checkbox"/> 55	Office Migration	Completed	West(67181)	11/02/2005 11:43PM	11/02/2005 11:48PM	00:04:40
<input type="checkbox"/> 56	Office Migration	Completed	Rosemead(11)	11/02/2005 11:29PM	11/02/2005 11:32PM	00:03:00

## Check Data Integrity through SmartOffice

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