

SmartMigrator
Office Duplication
User Guide

SmartOffice[®]



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Table of Contents

Introduction	1
Data Source Setup	1
Schema Consistency Check.....	2
Office Duplication.....	2
Console.....	3
Record Count Comparison	4
Check Data Integrity with SmartOffice.....	5

Introduction

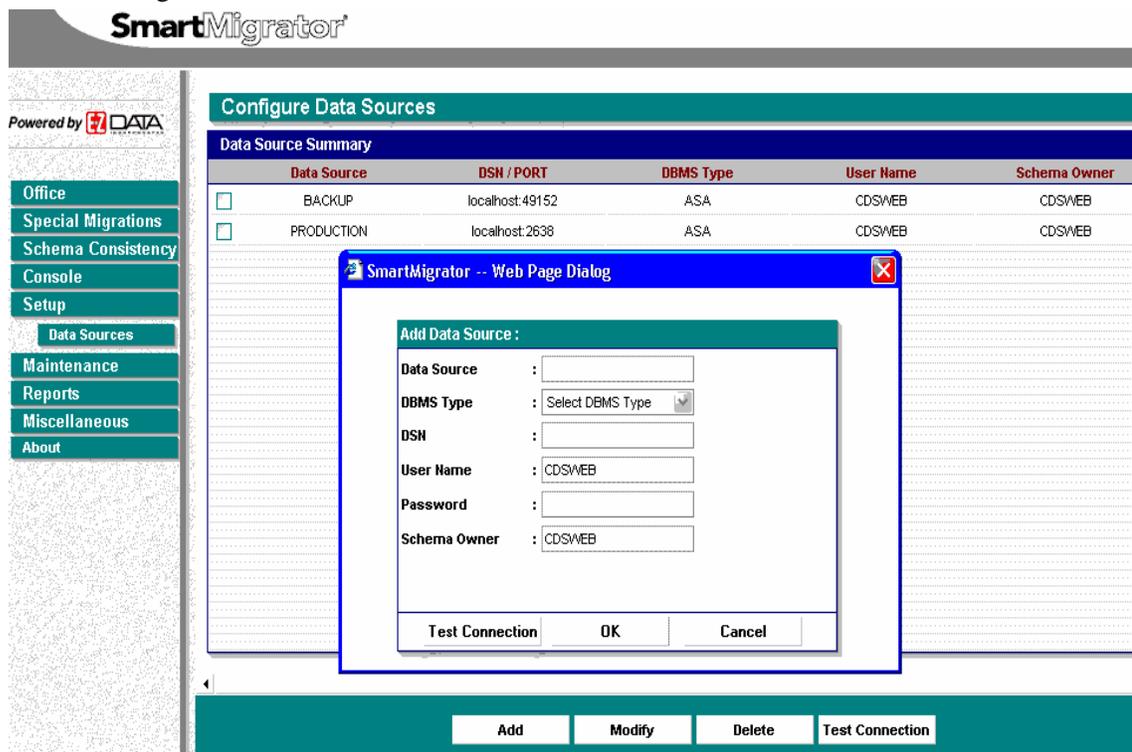
This document provides an overview of Office Duplication. Office Duplication is used to duplicate an office within the same database and is most commonly utilized for data backup and recovery.

The five steps of Office Duplication:

1. Create the production database Data Source.
2. Run a Schema Consistency Check on the production database to make certain that the database schemas are identical.
3. Run the Office Duplication.
4. Run a Record Count Comparison.
5. Check the status of the data after the office duplication with SmartOffice.

Data Source Setup

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

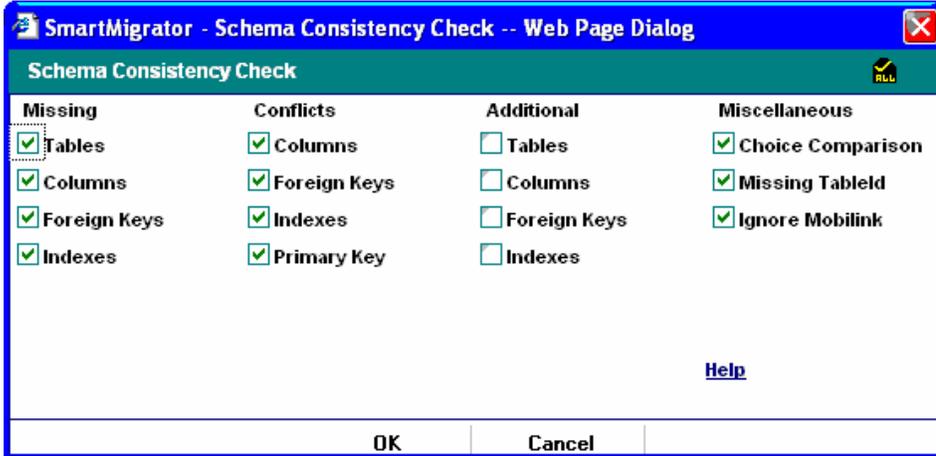


3. In the Data Source field, enter the Data Source name.
4. In the DBMS Type field, select the appropriate database type from the drop-down list.
5. In the DSN field, for Oracle and UDB, this will be the same as the Data Source; for ASA, enter the IP and Port of the location of the ASA DB.
6. In the 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 **Test Connection** to make certain that SmartMigrator can connect to the production database.
10. Click **OK** to save the Data Source Configuration.

Schema Consistency Check

It is advisable to run 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.

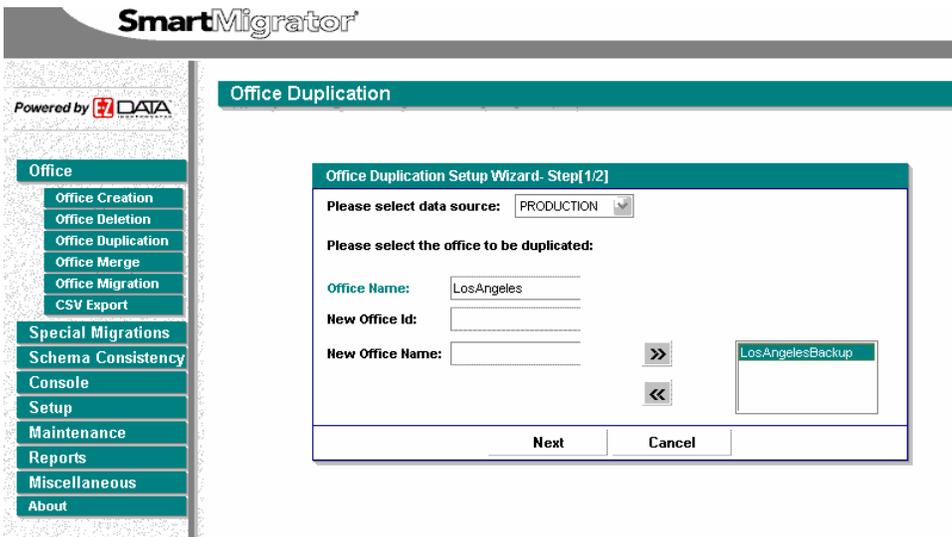
1. Click the **Schema Consistency** menu item and then select the production database.
2. Click **Check** to open the Schema Consistency Check dialog box.



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

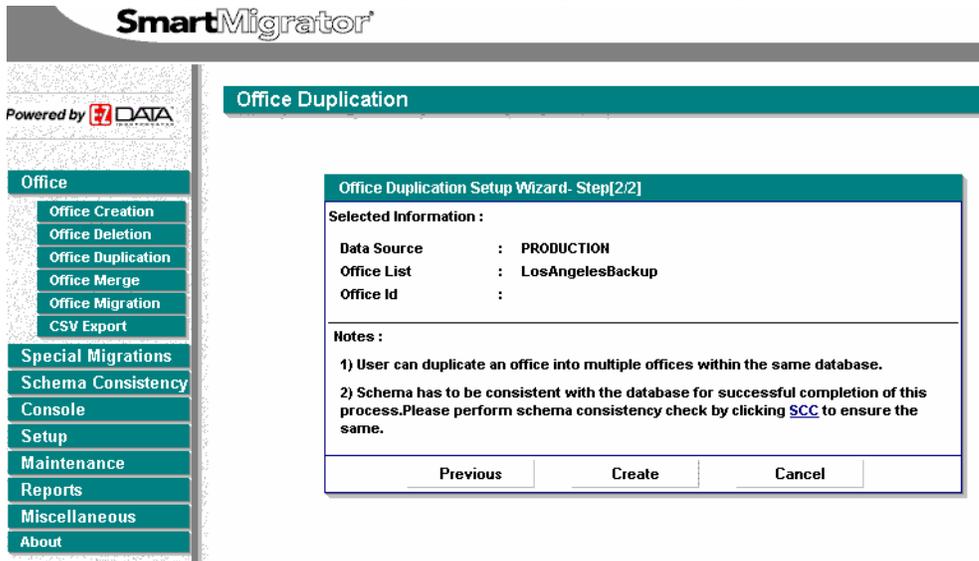
Office Duplication

1. To open the Office Duplication Wizard, select **Office Duplication** from the expanded **Office** menu.



2. In the Please Select data source field, select the target database.
3. In the Office Name field, enter the appropriate Office Name.
4. In the New Office ID field, enter the new Office ID number or leave it blank for the application to generate one automatically.
5. In the New Office Name field, enter the new Office Name then click the **Right-arrow** button.

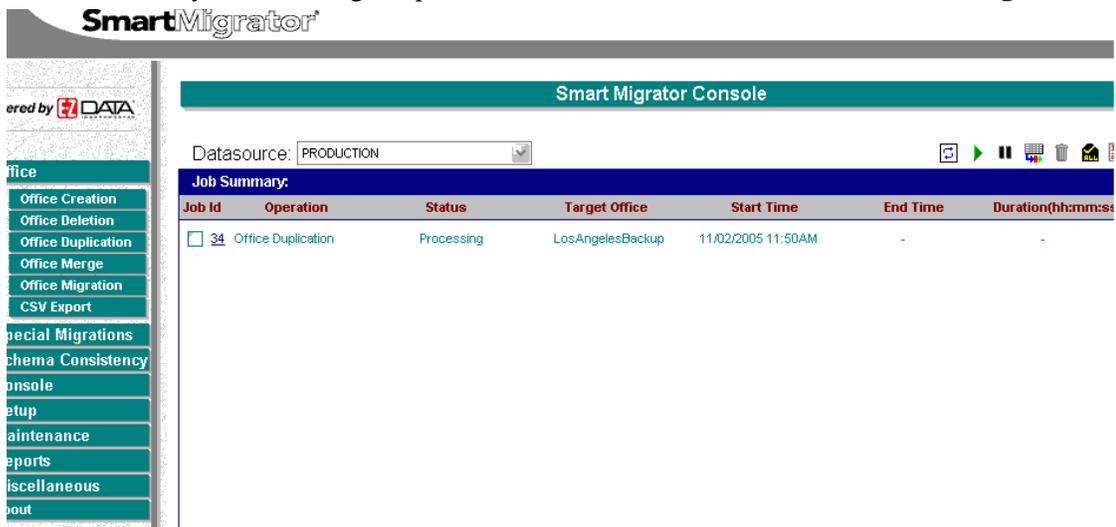
- Click **Next** to open the Office Duplication Setup Wizard – Step [2/2].



- Click **Create** to send the job to the Console.

Console

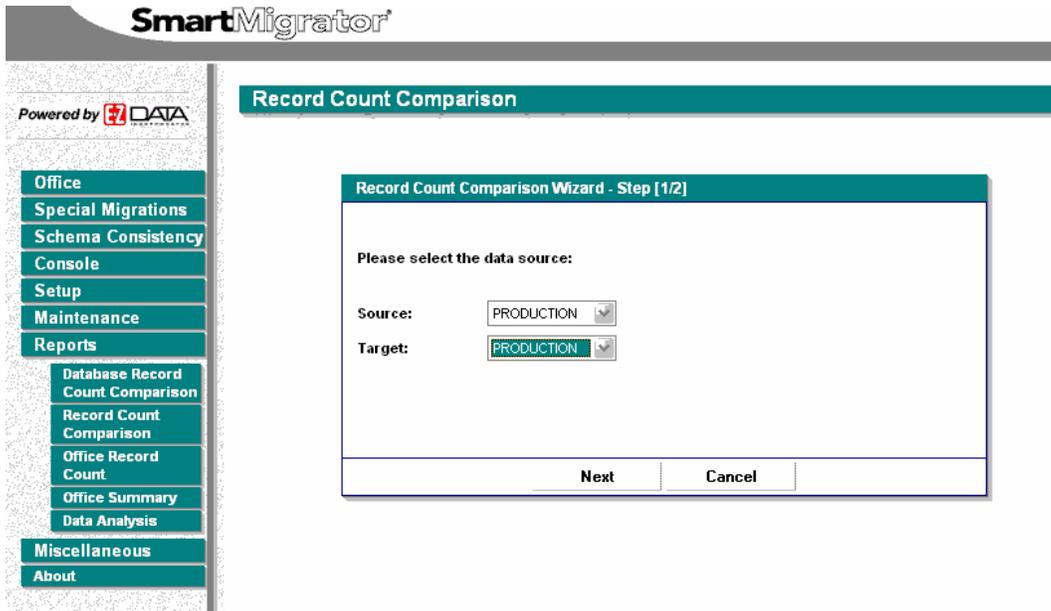
- To check the status of the Office Duplication, click the **Console** menu item. Once the process is finished, the Status will change from Processing to Completed.
- To check for any errors during the process, select the Job and then click the **View Log** button.



Record Count Comparison

Once the office duplication is complete, 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 the **Next** button.



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

Record Count Comparison			
Record Count [Source:SOPROD,Target:SOPROD]		Show HTML Report	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	

Check Data Integrity with SmartOffice

To check the data integrity after the office duplication process, log in to the duplicated office with SmartOffice and then check about 5 records with Policy, Account, Activity, Letter, Document and SmartPad Note information to see if all the data has been duplicated correctly. If there is missing data from the duplicated office that is in the source office, please contact the appropriate Project Manager.