



## APPLICATION MERGE UTILITY

 **TPOC Guide**

DocuPhase Version: 5.1 (only)

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**Revision History**

Item #	Release #	Revision Date	Dist/Pub Date	Description	Tracking Notes
000	ALL	10/04/18	10/12/18	Original	Requested by Kyle Wilson

## INTRODUCTION

### Purpose of this Guide

This guide provides information and instructions for the deployment and use of the DocuPhase Application Merge Utility. This utility allows users to combine existing source applications into a single target application to provide a single data source: alleviating the need for users to need to keep track of where data is stored, and making searches more efficient.

### Assumptions

The following must be true in order to successfully use the Application Merge Utility:

- ✓ The Application Merge is being performed on **DocuPhase version 5.1 only**.
- ✓ The Application Merge Utility has been **installed by the DocuPhase Implementation Specialist**.
- ✓ A DocuPhase **Certified TOPC** (Technical Point of Contact) is the only person using the Application Merge Utility, and has read all of the instructions and Best Practices included in this document.
- ✓ **Prerequisites** are met as described below.
- ✓ **Tracelogs** for the Merge Utility are located in C:\ProgramData\idatix\tracelogs and titled ApplicationMerge .

### Prerequisites

The following prerequisites ***must be met prior*** to running the utility:

- ✓ Make sure there is a **backup** of the database and repository.
- ✓ Add a **new index called Merge Indicator** to the source application(s) being merged. This index serves as an indicator as to whether or not the merge was successful.
- ✓ Once the Merge Indicator index has been created, all source and **target applications must be de-implemented** to prevent additional data being added to the database during the merge process.
- ✓ Add a **“placeholder” document** on the local machine.



#### NOTE

*It is recommended that you keep this document located in the same place as the configuration files (or in any directory where they are protected from deletion). Details for the purpose of this placeholder document are below.*

### Merge Functions

The Application Merge Utility has two functions accessed via the **File** menu:



#### NOTE

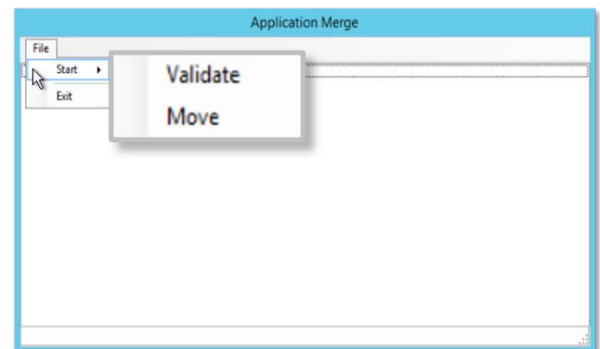
*Both functions require that you select the desired config.xml file (usually found in the following directory: C:\ProgramData\<idatix>\Application Merge)*

- **Validate** - used to validate the config file detailed in the Application Merge Utility Config.xml File (shown on page XX).



#### \*\*\*BEST PRACTICE\*\*\*

*It is recommended that you run the Validation tool once you have the config.xml set up for the first Index Mapping. This allows you to find and resolve any possible configuration error prior to running the utility for all Indexes.*



- **Move** - used to generate the Application merge, and displays the Utility window showing the number of process items completed.

## SETTING UP THE MERGE UTILITY CONFIG.XML FILE

The Merge Utility utilizes a config for the target to source information. This file (generally) located in the following directory: "C:\ProgramData\<idatix>\Application Merge".





**\*\*\*BEST PRACTICE\*\*\***

*It is recommended that you create and edit a config file for every Application that will be merged.*

### Section 1 – Basic Application & Document Mapping

In each Application config file (see Best Practice above), make the following edits:

For this Element...	Enter...
<b>Name</b>	a unique name for this set of Merge settings.   <b>***BEST PRACTICE***</b> <i>It is recommended that you use a name that directly relates to the source application.</i>
<b>Source Application ID</b>	the ID number of the Source Application from which data is to be pulled. See the <a href="#">Appendix</a> on page 4 of this guide to find out how to locate this information.
<b>Target Application ID</b>	the ID number of the Target Application into which you are merging the Source data (as described above). See the <a href="#">Appendix</a> on page 4 of this guide to find out how to locate this information.
<b>Path to Placeholder</b>	the path to your placeholder document: used in the event that a document is not found in the repository, a copy of the placeholder document automatically replaces the missing document during the Merge process.
<b>Where Clause</b>	a condition used in the event that you only want to merge a subset of data rather than the application.   <b>WARNINGS!!!</b> <ul style="list-style-type: none"> <li>• You must include "and" in the beginning of the condition.</li> <li>• The formatting of this section must match that of SQL formatting. However, conditional fields like &lt; or &gt; that break the XML structure.</li> </ul>
<b>Indicator Field</b>	the Merge Indicator index you added to the source Application(s), as noted in the <a href="#">Prerequisites</a> section on page 1 of this guide.

#### EXAMPLE

In this example, the Source and Target indexes are called Policy Number, but the full SQL table names are "idx\_Policy\_Number".

```
<Configurations>
  <Configuration>
    <Name>Config1</Name>
    <SourceApplicationID>#</SourceApplicationID>
    <TargetApplicationID>#</TargetApplicationID>
    <PathToPlaceholder>0:\junk\placeholder.jpg</PathToPlaceholder>
    <WhereClause>and status = 'e'</WhereClause>
    <IndicatorField>idx_Merge_Indicator</IndicatorField>
  </Configuration>
</Configurations>
```

## Section 2 - Index Mapping

Index Mapping is used to map each Source index to a Target index. In the config file for each Application (both Source and Target), make sure to map all Indexes using the SQL full column name used in the SQL table (see Example below).



### IMPORTANT!

**The config file requires the full column name found in the SQL Table.**



### EXAMPLE

In this example, the Source and Target indexes are called Policy Number, but the full SQL table names are "idx\_Policy\_Number".

```
<IndexMapping>
  <Source>idx_Policy_Number</Source>
  <Target>idx_Policy_Number</Target>
</IndexMapping>
```



### NOTE

Source and Target indexes do not need to match but ensure that the index you want to merge is merging into the correct Target.



### \*\*\*BEST PRACTICES\*\*\*

- To prevent typos, it is recommended that you copy and paste the element and update the information for each index for each configured element.
- As noted on page 1 of this document, it is recommended that use the Validate feature, then view the Merge Utility to check for and resolve errors. If no errors are found, continue to copy and paste new Index Mapping elements for the rest of your Source to Target indexes.

## Section 3 – Constant Mapping

“Constant Mappings” can be used to set a hard coded value in a Target index: providing a way to set a value that indicates what data came from which application prior to the merge. In the config file for each Target Application make sure to map all Indexes that should remain constant (see Example below).



### EXAMPLE

If you have separate Policy applications for each country that your company maintains (e.g., Mexico Policy, Panama Policy, Guatemala Policy, etc) going into a single Policy Target application, you may want to use this constant mapping to set the country name for each application being merged. Where the “X” value is something like ‘Panama’, to be merged into the SQL Table Target index of ‘idx\_Country’.

```
<ConstantMappings>
  <ConstantMapping>
    <Value>-X-</Value>
    <Target>idx_country</Target>
  </ConstantMapping>
</ConstantMappings>
```

## APPENDIX

### Find the Application ID on the Application Configuration Screen.

*In DocuPhase:*

- 1) Go to **Administration** ► **Cores** ► **Applications** to display the *Application Configuration* screen.
- 2) Find the Application ID on the far right of the window:

Application Configuration

[Add New Application](#)

Name	Description	Implemented	Rev. Control	Rev. Tracking	Doc. Level Sec.	Workflow	Incoming Status	ID
Accounts Payable	The Accounts Payable cabinet contains all of the invoices and related documents.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	P	3
AP Management	This cabinet is used to restrict access to the AP management form.	<input checked="" type="checkbox"/>					P	5
Bank Customer Files	This cabinet contains the documents required for the banking industry	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	P	6
Check Request	Used for the processing of a check request	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	0	6
Checks	This cabinet stores all of the checks received for the Accounting Department	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	P	1026