



Data Migration Instructions

Oracle® Health Sciences WebSDM and Empirica Study

Release 3.1.2

February 2013

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1 Introduction

This guide describes tasks that are performed to migrate a WebSDM™/Empirica™ Study 3.0 instance to WebSDM/Empirica Study 3.1.2. This includes migration from an Oracle 9i database instance to an Oracle 10g or 11g instance, and migration of data files and customization files.

Note: In the remainder of this guide, the product name WebSDM is used to reference both the WebSDM standalone product and WebSDM with the optional, additionally licensed Empirica Study features.

WebSDM 3.0 supports Oracle 9.2 database, whereas WebSDM 3.1.2 supports Oracle 10g or 11g. To upgrade a WebSDM 3.0 instance to 3.1.2, you must upgrade the database to a higher Oracle version as well. If WebSDM shares a database instance with other applications, upgrading the entire database may not be an option. A sensible approach would be to set up an Oracle 10g or 11g database and copy the existing WebSDM data to the new database. This guide describes the procedures for this approach.

2 Prerequisites

This section describes the required resources and information that must be available for the data migration.

2.1 Required Resources

Before you begin the migration, ensure that the following resources are available:

- Source server: The machine where the WebSDM 3.0 instance is installed.
- Source database: An Oracle 9.2 or higher database instance that contains the WebSDM data.
- Target server: The machine where the WebSDM 3.1.2 instance will be installed.
- Target database: Oracle 10g (10.2.0.3 or higher) or Oracle 11g (11.2.0.2 or higher) database instance to which the WebSDM data will be migrated.
- TNS connection can be made between the source and target databases.
- Oracle DBA accounts (SYSTEM or SYSTEM-equivalent) and passwords for both databases.
- Zip file containing migration scripts.
- Microsoft Excel (to examine output of the schema differences report).
- A file compression and extraction utility, such as, WinZip.
- The document *Windows 2003/2008 Server Installation Instructions for WebSDM and Empirica Study 3.1.2*.

2.2 Required Information

You will need the following names and passwords for accounts and services which will be referenced in the instructions. The values will be referenced by the

<text_in_angle_brackets>.

Name	Description
<source_oracle_root>	File system Oracle install root directory on the source server. For example, D:\ORACLE\ORA92.
<source_conn_str>	TNS connection name that points to the source database.
<source_dba_acct> <source_dba_pwd>	Source Oracle DBA account name and password.
<target_conn_str>	TNS connection name that points to the target database.

<target_dba_acct> <target_dba_pwd>	Target Oracle DBA account username and password.
<websdm_master_acct>	WebSDM Oracle master account (for example, websdm).
<websdm_master_acct_pwd>	WebSDM Oracle master account password.
<db_link>	Oracle DB link name that will be created in the target database that points to the source database.
<source_data_file_dir>	File system directory path where the Oracle data files reside on the source server.
<target_data_file_dir>	File system directory path where the Oracle data files reside on the target server.
<target_oracle_root>	File system Oracle install root directory on the target server. For example, D:\ORACLE\PRODUCT\11.2.0.
<submissions_folder>	Value of the WebSDM site option Root directory of source data for all applications and studies on the source server. The same directory name will be created on the target server.
<source_websdm_version>	WebSDM version installed on the source server.

3 Source Server Migration

This section describes all migration steps that must be completed on the source server.

3.1 Unzip Migration Kit

Unzip `websdm312_migration_kit` to a location of your choice on the source server file system. This will create three folders: `scripts`, `data_files`, and `dump`. The `scripts` folder will contain the files listed in Appendix A. The `data_files` and `dump` folders will initially be empty. You will copy files into these folders during the migration.

3.2 Source Instance before Migration

To gather objective evidence on the state of the source instance before migration, perform Section A of the `M&IQ_Test.doc` supplied in the WebSDM Migration Kit.

3.3 Prepare Source Database

On the Source Server, complete the following instructions to prepare the source database prior to migration.

3.3.1 Stop WebSDM Service

Open the **Start menu**, select **Administrative Tools**, and then **Services**. Right-click on the WebSDM service and choose **Stop**.

3.3.2 Create TNS Connection to Source Database Instance

Create a TNS entry that points to the source database if it does not already exist:

1. Open the `tnsnames.ora` file in `<source_oracle_root>\network\admin`.
2. Add a new connection entry named `<source_conn_str>` that points to the source database.
3. Test the connection by opening a Command Prompt and typing:

```
tnsping <source_conn_str>
```

The TNS entry and the connection time should be displayed.

3.3.3 Collect Schemas to Be Copied

The SQL script `list_schemas.sql` creates the table `tmp_websdm_schemas` in the `<source_dba_acct>` account and inserts a row into the table for each schema to be migrated. The list includes the WebSDM master schema (for example, `websdm`), the accounts of the registered studies, and the MedDRA dictionary accounts.

The definition of the `tmp_websdm_schemas` table is:

Column Name	Type	Description
SCHEMA_NAME	VARCHAR2(30)	The name of schema that should be migrated.
IS_MASTER_ACCT	CHAR(1)	Indicates type of account. Possible values: <ul style="list-style-type: none">• Y if the account is WebSDM master account.• N if the account is not WebSDM master account.

Follow these steps to create and populate the table `tmp_websdm_schemas`:

1. In SQL*Plus as `<source_dba_acct>@<source_conn_str>`, execute `list_schemas.sql`, enter the WebSDM account name `<websdm_master_acct>` when prompted.
2. In SQL*Plus as `<source_dba_acct>@<source_conn_str>`, execute `schemas_migrate.sql`. Enter the WebSDM account name `<websdm_master_acct>` when prompted.
3. Examine `schemas_migrate.log`. If the schema list is incorrect or incomplete, you can correct it by updating or inserting into the `tmp_websdm_schemas` table.
4. When the list of schemas is correct, execute `schemas_migrate.sql` again to document the final list.

3.3.4 Generate Tablespace Creation Script

Follow these steps to generate the `create_tablespaces.sql` script. (This script will be executed later to create the tablespaces in the target database.)

1. In SQL*Plus as `<source_dba_acct>@<source_conn_str>`, execute this query:

```
SELECT DISTINCT tablespace_name FROM dba_segments WHERE owner
in (SELECT UPPER(schema_name) FROM tmp_websdm_schemas);
```

Verify that the list contains all tablespaces used by accounts in the WebSDM instance. If the returned list does not contain all the tablespaces for the schemas you plan to migrate, you will need to modify the generated script `create_tablespaces.sql` in step 4 to add or remove **create tablespace** statements.

2. In SQL*Plus as `<source_dba_acct>@<source_conn_str>`, execute `gen_create_ts.sql`.
3. Verify that the script has created the file `create_tablespaces.sql`.

-
4. Open `create_tablespaces.sql` using Notepad.
 5. Pick any CREATE TABLESPACE statement. Note that the file path to the data file refers to the path in the source file system (<source_data_file_dir>). Copy the path. Using the **Replace All** option of Notepad, replace the source path with the data file path in the target server (<target_data_file_dir>). In the following example, <source_data_file_dir> = 'D:\ORACLE\ORA92\ORADATA\ORCL' and <target_data_file_dir>='D:\ORACLE\PRODUCT\11.2.0\ORADATA\ORCL':

Before:

```
CREATE TABLESPACE "WEBSDM" DATAFILE
'D:\ORACLE\ORA92\ORADATA\ORCL\WEBSDM.DBF'
SIZE 209715200 AUTOEXTEND ON NEXT 10485760 MAXSIZE 32767M...
```

After Replacement:

```
CREATE TABLESPACE "WEBSDM" DATAFILE
'D:\ORACLE\PRODUCT\11.2.0\ORADATA\ORCL\WEBSDM.DBF'
SIZE 209715200 AUTOEXTEND ON NEXT 10485760 MAXSIZE 32767M
```

6. Examine the `create_tablespaces.sql` file. If other directory paths (different from <source_data_file_dir> that you identified) exist, replace them with <target_data_file_dir> as well.
7. If any of the tablespaces require encryption, add the following to the corresponding CREATE TABLESPACE command:

```
ENCRYPTION USING 'AES256' DEFAULT STORAGE (ENCRYPT)
```

8. Save the `create_tablespaces.sql` file.

3.4 Export Source Database

Complete the following instructions to perform the migration on the Source Server.

Before starting, note that the migration procedure uses Oracle Export and Import utilities to copy data from the source to the target database. Because of version compatibility issues, you will need to export the data using the Oracle Export Utility on the source database, and import the data using the Oracle Import Utility on the target database, instead of using the Data Pump.

The scripts `gen_exp_bat.sql` and `gen_imp_bat.sql` are provided to create batch scripts that include one or more import or export commands.

3.4.1 Generate Export Script

1. In SQL*Plus as <source_dba_acct>@<source_conn_str>, execute `gen_exp_bat.sql`. Enter the WebSDM account name <websdm_master_acct> when prompted.

-
2. Verify that the script has created two files, `exp_schemas.bat` and `exp_params.txt`.
 3. Edit the file `exp_params.txt`. Change `<source_dba_pwd>` and `<source_conn_str>` to the actual password and the connection string to the source database. For example:

```
userid=system/mysystempwd@source_db
```
 4. Save `exp_params.txt`.

3.4.2 Export Source Data

1. Open a Command Prompt and set the default directory to the migration directory.
2. Execute `exp_schemas.bat`.
3. Verify that the script has created two new folders under in the migration directory, `dump` and `exp_logs`. The `dump` folder contains the exported data files and the `exp_logs` folder contains the log files.
4. Periodically check the log files in `exp_logs` for errors while the script executes. It may take a long time to complete.

3.5 Prepare Source File System

On the Source Server, complete the following instructions to prepare additional files for migration from the source file system.

3.5.1 Copy Custom Files

Under the `c:\Lincoln\apps\websdm\webapps\web_root` folder, locate the `customhomes` and `image` subfolders. Copy any custom content from these subfolders to a subfolder of the same name in the `websdm312_migration_kit\` folder.

3.5.2 Zip Application Data Directories

1. In SQL*Plus as `<websdm_master_acct>@<source_conn_str>`, execute `list_dirs.sql`. Enter `<websdm_master_acct_pwd>` when prompted for the password.
2. Examine `list_dirs.txt`. Usually it will contain only the directory specified in the site option **Root directory of source data for all applications and studies** (which is the value of `<submissions_folder>`).
If your installation has loaded applications from another location, the list will contain those directories as well.
3. For each directory in `list_dirs.txt`, zip the directory and its contents and move the ZIP file to the folder `websdm312_migration_kit\data_files`.

4 Target Server Migration

This section describes migration steps that must be completed on the target server.

4.1 Copy Migration Kit

Copy the `websdm312_migration_kit` folder and its contents from the source server file system to a location of your choice on the target server file system.

Note: Do not unzip the original `websdm_migration312_kit.zip` file as it will not contain the scripts that were generated by the Source Server Migration.

When executing scripts as specified by the instructions in this section, set the default directory to the `websdm312_migration_kit\scripts` directory on the target server.

4.2 Prepare Target Database

4.2.1 Create TNS Connections to Source and Target Database Instances

Create two TNS entries on the Target Server, one that points to the source database, and one to the target database.

1. Open the `tnsnames.ora` file in `<target_oracle_root>\network\admin`.
2. Add a new connection entry named `<source_conn_str>` that points to the source database.
3. Add a new connection entry named `<target_conn_str>` that points to the target database if one does not already exist.
4. Save the `tnsnames.ora` file.
5. Test the connection by opening a Command Prompt and typing:

```
tnsping <source_conn_str>
```

The TNS entry and the connection time should be displayed.

6. If an entry of `<target_conn_str>` was also added, still in Command Prompt, type:

```
tnsping <target_conn_str>
```
7. Verify that the connection information is displayed.

4.2.2 Create Database Link to Source Database Instance

1. In SQL*Plus as `<target_dba_acct>@<target_conn_str>`, execute this statement:

```
CREATE DATABASE LINK <db_link>
CONNECT TO <source_dba_acct> IDENTIFIED BY <source_dba_pwd>
USING '<source_conn_str>';
```

-
2. Test the database link using this query, which should return the correct hostname and instance of the source database.

```
SELECT host_name, instance_name FROM v$instance@<db_link>;
```

4.2.3 Create Tablespaces

1. In SQL*Plus as <target_dba_acct>@<target_conn_str>, execute the `create_tablespaces.sql` script.
2. After the script completes, check the output file `create_tablespaces.log` in the migration directory for errors.

4.2.4 Create Schemas

1. In SQL*Plus as <target_dba_acct>@<target_conn_str>, execute the `create_schemas.sql` script, supplying the database link <db_link>, and the WebSDM master account name and password (<websdm_master_acct> and <websdm_master_acct_pwd>) when prompted.
2. After the script completes, check the output file `create_schemas.log` for errors.

4.3 Import Target Database

4.3.1 Generate Import Script

1. In SQL*Plus as <target_dba_acct>@<target_conn_str>, execute `gen_imp.bat.sql`. Enter the database link <db_link> and WebSDM account name <websdm_master_acct> when prompted.
2. Verify that the script has created two files, `imp_schemas.bat` and `imp_params.txt`.
3. Edit the file `imp_params.txt`. Change <target_dba_pwd> and <target_conn_str> to the actual password and the connection string to the source database. For example:

```
userid=system/mysystempwd@target_db
```

4. Save `imp_params.txt`.

4.3.2 Import Data

1. From the Command Prompt, execute `imp_schemas.bat`.
2. Verify that the script has created a new folder named `imp_logs` in the migration directory.
3. Periodically check the log files in `imp_logs` for errors while the script executes. It may take a long time to complete.

4.4 Populate Target File System

1. Unzip the ZIP file for the <submissions_folder> directory specified as the root directory in websdm312_migration_kit\data_files. Unzipping this file will create and populate a <submissions_folder> directory on the target server.
2. If the source and target directories are on different devices, execute the update_dev_root.sql script to update the target database table.
 - a. In SQL*Plus as <target_dba_acct>@<target_conn_str>, execute update_dev_root.sql.
 - b. Enter the new device name when prompted. The script assumes that the rest of the path is the same on source and target.
3. If there are additional ZIP files for applications that were not under the root, unzip them to the target file system.
4. If the additional directories are on a different device in the source file system, execute the update_dev_other.sql script to update the target database table.
 - a. In SQL*Plus as <target_dba_acct>@<target_conn_str>, execute update_dev_other.sql.
 - b. Enter the new device name when prompted. The script assumes that the rest of the path is the same on source and target.

5 Confirm Schema Migration

This section includes cleanup procedures, restart procedures, and creation of a report that verifies that there are no differences between the source and target schemas. The report examines all migrated schemas and reports on any difference in the entire set of objects including object name and type, differences in table structure column names and types, and differences in table row counts.

5.1 Update Statistics

1. In SQL*Plus as `<target_dba_acct>@<target_conn_str>`, execute `update_stats.sql`.
2. Enter the `<db_link>` name when prompted.

5.2 Execute Differences Report

1. In SQL*Plus as `<target_dba_acct>@<target_conn_str>`, execute `diff_schemas.sql`.
2. Enter the `<db_link>` name when prompted.
3. When the script completes, use Microsoft Excel to examine the output file `schema_diff.csv`.
4. Verify `schema_diff.csv` contains no reported differences.

5.3 Cleanup

1. On the source server, in SQL*Plus as `<source_dba_acct>@<source_conn_str>`, execute this statement:

```
Drop table tmp_websdm_schemas;
```
2. On the target server, in SQL*Plus as `<target_dba_acct>@<target_conn_str>`, execute this statement:

```
Drop database link <db_link>;
```
3. Delete the `exp_params.txt` and `imp_params.txt` files.
4. Archive the migration folders on both the source and target servers to a secure location, and then delete them from the servers.
5. If the TNS entries that were created for the migration are no longer needed, remove them from the `tnsnames.ora` file.

6 Prepare for WebSDM 3.1.2 installation

You will now prepare the target server for installation of WebSDM 3.1.2. Most instructions for this are in the *Windows 2003/2008 Server Installation Instructions for WebSDM and Empirica Study 3.1.2*, references to which are bulleted and shown here in **bold** font.

- Review the introductory material in sections **1 Introduction** and **2.1 Prerequisites** to ensure you have all required resources and information.
- Perform the steps in section **2.2.1 Setting up the Oracle net service**.
- If the WebSDM application and the Oracle database will be on separate servers in the target environment, perform the steps in section **2.2.2 Encrypting the database connection**.

7 Upgrade the Database to 3.1.2

For the database upgrade, locate the `database-3_1_2_0_xxx.zip` file on the installation CD. Extract the contents of this file to a temporary location, such as, `c:\temp\database`.

1. Open a command window and change to the temporary folder containing files extracted from `database-3_1_2_0_xxx.zip`.
2. Open the file named `update_char_col_length_semantics.sql` using a text editor, such as Notepad. Change the value of `USER_NAME` to the value of `<websdm_master_acct>`, if it is other than **websdm**.
3. Enter the following command:

```
sqlplus <target_dba_acct>@<target_conn_str>  
      @update_char_col_length_semantics.sql
```
4. When prompted for the password, enter `<target_dba_pass>`.
5. This script may take several minutes to run if the database contains many studies. When the script completes, exit SQL*Plus..
6. Examine the `update_char_col_length_semantics.log` file. It should contain no errors or warnings; contact Oracle for assistance if any were reported.
7. Enter the following command:

```
sqlplus <target_dba_acct>@<target_conn_str> @update_by_sys.sql
```
8. When prompted for the password, enter `<target_dba_pass>`.
9. Enter the following command:

```
sqlplus <websdm_master_acct>@<target_conn_str>
```
10. When prompted for the password, enter `<websdm_master_acct_pwd>`.
11. Within SQL*Plus, enter the correct upgrade script (one of the three following) depending on `<source_websdm_version>`
 - If `<source_websdm_version>` is 3.0.152, enter the upgrade script:
`@6_update_152to3_1_2.sql`
Note: Do not execute this script if `<source_websdm_version>` is not 3.0.152.
This will produce three log files `6_update_152to186.log`,
`6_update_186to3_1.log` and `6_update_3_1to3_1_2.log`. Examine all three log files. If any errors or warnings are found, contact Oracle for assistance.
 - If `<source_websdm_version>` is 3.0.157, 3.0.158, or 3.0.159, enter the upgrade script: `@6_update_157to3_1_2.sql`
Note: Do not execute this script if `<source_websdm_version>` is not 3.0.157, 3.0.158, or 3.0.159.

This will produce three log files 6_update_157to186.log, 6_update_186to3_1.log and 6_update_3_1to3_1_2.log. Examine all three log files. If any errors or warnings are found, contact Oracle for assistance.

- If <source_websdm_version> is 3.0.185 or 3.0.186, enter the upgrade script:
@6_update_186to3_1_2.sql

Note: Do not execute this script if <source_websdm_version> is not 3.0.185 or 3.0.186.

This will produce two log files 6_update_186to3_1.log and 6_update_3_1to3_1_2.log. Examine both log files. If any errors or warnings are found, contact Oracle for assistance.

12. Open the file named alter_oracle_user2.sql using a text editor, such as Notepad. Change the value of USER_NAME to the value of <websdm_master_acct>, if it is other than **websdm**.
13. Enter the following command:

```
sqlplus <target_dba_acct>@<target_conn_str> @alter_oracle_user2.sql
```
14. When prompted for the password, enter <target_dba_pass>.
15. Exit SQL*Plus.
16. Examine the script output. If any errors or warnings are found, contact Oracle for assistance.

8 Install and Configure WebSDM 3.1.2 Software

1. To install the WebSDM 3.1.2 application software, turn again to the *Windows 2003/2008 Server Installation Instructions for WebSDM and Empirica Study 3.1.2* document. Follow the instructions in these sections:
 - **2.3 Install WebSDM software**
 - **2.4 Install supporting software**
 - **2.5 Configure WebSDM application properties files**
 - **2.6 Set file permissions**
 - **2.8 Start the websdm service**
 - All subsections of **3 Configure the WebSDM Application**
2. Assure that the Windows <instance>_app user (created in subsection 2.3.9 of the *Windows 2003/2008 Server Installation Instructions*) has **Read** and **Write** permissions on the <target_application_dir>. To do so, open Windows Explorer and right-click on the <target_application_dir>. Select Properties, the Security tab, and the <instance>_app user to verify or set these permissions. Save any changes if needed.
3. To copy custom files to the target server, examine the websdm312_migration_kit folder for subfolders named customhomes or image. If either subfolder exists, copy the files from each subfolder to the respective subfolder under
C:\Lincoln\apps\websdm\webapps\web_root.

9 Verify the WebSDM Data Migration

To verify the data migration, follow these steps:

1. Perform Sections B, C, and D of the `M&IQ_Test.doc` supplied in the WebSDM Migration Kit.
2. For Operational Qualification testing, refer to the `OQ_Test.doc` file.
3. When these tests are completed, notify users that the data has been migrated successfully and that the new server is ready for use:
 - a. Log in to WebSDM as the admin user.
 - b. Select the **Settings, Send Message to All Users** function to inform users of the new URL address they should use to access WebSDM.

Appendix A – Migration Scripts

The `websdm312_migration_kit\scripts` directory contains the following scripts:

Scripts executed on source server:

Script Name	Description	Script Parameters
<code>gen_create_ts.sql</code>	Generates a SQL script for creating tablespaces in the target database.	None
<code>gen_exp_bat.sql</code>	Generates a batch file to export the schemas from the source database.	<code><websdm_master_acct></code>
<code>list_dirs.sql</code>	Generates a script to zip application directories.	<code><websdm_master_acct></code>
<code>list_schemas.sql</code>	Collects the schemas that should be migrated. Creates a table <code>tmp_websdm_schemas</code> to store the list.	<code><websdm_master_acct></code>
<code>schemas_migrate.sql</code>	Lists schemas that will be migrated.	None

Scripts executed on target server:

Script Name	Description	Script Parameters
<code>create_schemas.sql</code>	Creates the schemas in the target database.	<code><db_link></code> <code><websdm_master_acct></code> <code><websdm_master_acct_pwd></code>
<code>gen_imp_bat.sql</code>	Generates a batch file to import the schemas from the target database.	<code><db_link></code> <code><websdm_master_acct></code>
<code>diff_schemas.sql</code>	Compares the source and target schemas after migration.	<code><db_link></code>
<code>update_stats.sql</code>	Update the database statistics after migration.	<code><db_link></code>
<code>update_dev_root.sql</code>	Updates the device in the file path in the siteoptions tables.	<code><new_device></code>
<code>update_dev_other.sql</code>	Updates the device in the file path in the applications tables.	<code><new_device></code>