Accela Civic Platform®

Migration Guide

Accela

Accela Civic Platform Migration Guide

Version 8.0
October 2015

Corporate Headquarters

2633 Camino Ramon
Suite 500
Bishop Ranch 3
San Ramon, CA 94583

Tel: (888) 722-2352
Fax: (925) 659-3201

www.accela.com

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Introduction

This document provides instructions for performing complete and partial migration of a Civic Platform deployment from one environment to another. This document does not address conversion of data from an external source into Civic Platform. Contact Accela professional services for conversion of data from an external source.

You migrate a Civic Platform deployment by moving information from a source database to a target database. To complete the migration, you set parameters specific to the new environment and reset certain Civic Platform operational parameters.

Civic Platform provides for migrating two types of database information; 1) configuration data and, 2) transaction data. Configuration data consists of two components; 1) information about the agency, module, record type and so forth (the Accela schema), and 2) information about the main console layout and main console setup (the Jetspeed schema). Transaction data consists of (auditable) information that Civic Platform generates on record type instances during their lifecycle from creation to destruction.

> **Note:**
> Agency configuration data equates to the
>
> ```
> serv_prov_code
> ```
>
> level of your implementation. When you migrate agency configuration data you may affect interactions with other agencies that operate under the same super agency.

You can migrate configuration data and transaction data or only configuration data. You can also migrate a selective subset of configuration data.

The approach you use to export data from the source database depends on your database (SQL Server or Oracle) and whether you want to migrate configuration data and transaction data, only configuration data, or only a subset of configuration data.

If you want to migrate all configuration data and all transaction data, perform a full backup of the source database and restore to the target database (export/import or data pump if you are using Oracle) (Accela Database Migration). If you only want to migrate configuration data, you run a script to export the configuration data. You then import the configuration data into the target database (Configuration Migration). If you only want to migrate a subset of configuration data, use the Data Manager tool (Data Manager.)

Typical use cases for a database migration include the following:

- **Development to test and test to production**. In both these use cases, you typically migrate configuration data only. Use Data Manager to make incremental configuration changes to the test environment or production environment without disrupting transaction data in your environment.

  > **Note:**
  > The Data Manager tool only migrates record type configuration data. You cannot use Data Manager to migrate configuration data related to the agency, module, or the main console layout and main console setup (the Jetspeed schema).

- **Production to production environment**. In this use case, you migrate configuration data and transaction data.

Accela Database Migration

Instructions are provided for migrating Oracle and SQL Server databases.

Related Links

Understanding Database Migration

Copying and Setting Accela Environment Parameters

Performing a Full Accela Database Migration – Oracle

Performing a Full Database Migration – SQL Server

Understanding Database Migration

If you want to migrate all configuration data and transaction data, you can use the native database utilities, export and import (or data pump) for Oracle (Performing a Full Accela Database Migration – Oracle), or backup and restore for SQL Server (Performing a Full Database Migration – SQL Server).

> **Note:**
> You can use this approach even if you do not want to include transaction data in your migration. If you do not have a lot of transaction data, it may be easier to delete the transaction data in your target database than it is to use scripts to only migrate configuration data.

After migrating configuration data, perform the post migration steps (Post Migration).

Copying and Setting Accela Environment Parameters

Accela Environment-specific Parameters provides a list of common Accela-specific environment parameters. When you import the source (development or test) database into the target (production) database, the import process overwrites these parameters in the target database with the values from the source database. You must reset these parameters for the target database, back to their values before the import. Prior to importing the source database, write-down these parameters so that you know the values to which to reset the parameters.

> **Note:**
> Accela Environment-specific Parameters comprises the most common environment parameters. Record all the parameters specific to your environment and implementation.

Table 1: Accela Environment-specific Parameters

Category	Parameter	Where Configured	Database Table
Document Repository	EDMS (URL)	Standard Choice (AA Classic > Admin Tools > Agency Profile > Standard Choices)	rbizdomain_value
External APO	EXTERNAL_PARCEL_SOURCE (URL)EXTERNAL_ADDRESS_SOURCE (URL)EXTERNAL_OWNER_SOURCE (URL)	Standard Choice (AA Classic > Admin Tools > Agency Profile > Standard Choices)	
Epayment	ONLINEPAYMENT_WEBSERVICE_URL (Epayment Adapter)	Standard Choice (AA Classic > Admin Tools > Agency Profile > Standard Choices)	rbizdomain_value

	EPaymentAdapter	Standard Choice (AA Classic > Admin Tools > Agency Profile > Standard Choices)	rbizdomain_value
ACA	ACA_CONFIGS (ACA_SITE, PAYMENT_TRANSACTION_SETTING)	Standard Choice (AA Classic > Admin Tools > Agency Profile > Standard Choices)	rbizdomain_value
	ACA_CAP_PAYMENT	Standard Choice (AA Classic > Admin Tools > Agency Profile > Standard Choices)	xpolicy
	ACA_ONLINEPAYMENT_WEBSERVICE_URL	Standard Choice (AA Classic > Admin Tools > Agency Profile > Standard Choices)	xpolicy
	ACA screen text pages embedded with HTML or URL	The ACA administration tool for each affected page	xui_text
	Customized content embedded with HTML or URL	The ACA administration tool for each affected page	bcustomized_content
Event Scripts	URLs embedded in Event Scripts	(AA Classic > Admin Tools > Events > Scripts)	revt_agency_script
GIS	GIS SERVICE URL	GIS Service (AA Classic > Admin Tools > GIS > GIS Services)	agis_service
Reporting	Servicename	Report Service Form portlet (Admin > Setup > Report > Report Manager > Settings > Report Services)	xpolicy
	password	Report Service Form portlet (Admin > Setup > Report > Report Manager > Settings > Report Services)	xpolicy
	reportNameURL	Report Service Form portlet (Admin > Setup > Report > Report Manager > Settings > Report Services)	xpolicy
	url	Report Service Form portlet (Admin > Setup > Report > Report Manager > Settings > Report Services)	xpolicy
	environment	Report Service Form portlet (Admin > Setup > Report > Report Manager > Settings > Report Services)	xpolicy
	authtype	Report Service Form portlet (Admin > Setup > Report > Report Manager > Settings > Report Services)	xpolicy
MY NAVIGATION	link URLs	My Navigation portlet (Admin > Setup > Agency Profile > My Navigation)	bportletlinks
Security	PaymentAccountSec (username, password)	The database administration tool	xpolicy
	PaymentAdapterSec (URL, username, password)	The database administration tool	xpolicy
	PaymentConfigSec (URL)	The database administration tool	xpolicy

	PaymentAccountVirtualMerchantsec (user ID, pin)	The database administration tool	xpolicy
Autonumber	max sequence value	Sequence Definition portlet (Admin > Setup > System Tools > Sequence Generator)	aa_sys_seq
	max application#	Sequence Definition portlet (Admin > Setup > System Tools > Sequence Generator)	aa_seq

Performing a Full Accela Database Migration – Oracle

Topics:

- Exporting the Data

- Preparing the Target Database

- Importing the Data

- Enabling the Foreign Key

Exporting the Data

In this migration, you export a copy of the database from the source environment and you import the database as new or as a replacement of the target environment. For instance, a database administrator (DBA) exports the Accela and Jetspeed schemas that uses either the exp or expdp utilities provided by Oracle. Though an example of this for each utility follows, please consult the Oracle documentation for further explanation of any parameters.

```
exp system/password@tns file=exportSource.dmp log=exportSource.log
  owner=(ACCELA,JETSPEED)
expdp system/password@tns directory=DATA_PUMP_DIR
  dumpfile=exportSource.dpdmp logfile=exportSource.log
  schemas=(ACCELA,JETSPEED)
```

Both utilities produce a logical export of the Accela and Jetspeed schemas that you can transfer, by file copy commands, to the target database.

Preparing the Target Database

Prior to importing the data, install Civic Platform (Installing Civic Platform), disable the foreign key (Disabling the Foreign Key), and delete all system configuration data and agency configuration data (Deleting System and Agency Configuration Data).

Topics:

- Installing the Civic Platform

- Disabling the Foreign Key

- Deleting System and Agency Configuration Data

Installing Civic Platform

The Civic Platform installer creates the database tables, into which you migrate the configuration data and transaction data, in the target database.

1. Install Civic Platform to the target database (see the Civic Platform Installation Guide).

> 📝 **Note:**
>
> The Civic Platform version for the target environment must match the SP version number of the Civic Platform version for the source environment.

Disabling the Foreign Key

Run the following script.

```
set pagesize 0 feedback off linesize 1000 trimspool on
spool disable_fk.lst
select 'alter table accela.'||table_name||' disable constraint '||
constraint_name||';'
from dba_constraints where owner='ACCELA' and constraint_type='R' and
 status='ENABLED'
union
select 'alter table jetspeed.'||table_name||' disable constraint '||
constraint_name||';'
from dba_constraints where owner='JETSPEED' and constraint_type='R' and
 status='ENABLED';
spool off
-- run the spooled result
set feedback on
@disable_fk.lst
```

Deleting System and Agency Configuration Data

Run the following script.

```
set pagesize 0 feedback off linesize 1000 trimspool on
 spool delete_aa.lst
 select 'delete accela.'||table_name||';'||'
 commit;'
 from dba_tables where owner='ACCELA'
 union
 select 'delete jetspeed.'||table_name||';'||'
 commit;'
 from dba_tables where owner='JETSPEED'
 order by 1 desc;
 spool off
 -- run sql script file
 set feedback on echo on
 @delete_aa.lst
```

Importing the Data

If importing into an existing Civic Platform environment, record the environment settings before you import or restore into the target database (Copying and Setting Accela Environment Parameters).

Use the **imp** or **impdp** commands to import the data to the target database (depending on whether you created the export with the **exp** or **expdp** commands, respectively). Though an example of this for each utility follows, please consult the Oracle documentation for further explanation of any parameters.

```
imp system/password@tns file=exportSource.dmp log=importTarget.log
 fromuser=(ACCELA,JETSPEED) touser=(ACCELA,JETSPEED)ignore=y
impdp system/password@tns directory=DATA_PUMP_DIR
 dumpfile=exportSource.dpdmp logfile=importTarget.log
 remap_schema=ACCELA:ACCELA remap_schema=JETSPEED:JETSPEED
```

Enabling the Foreign Key

Run the following script.

```
set pagesize 0 feedback off linesize 1000 trimspool on
spool enable_fk.lst
select 'alter table accela.'||table_name||' enable constraint '||
constraint_name||';'
from dba_constraints where owner='ACCELA' and constraint_type='R' and
 status='DISABLED'
union
select 'alter table jetspeed.'||table_name||' enable constraint '||
constraint_name||';'
from dba_constraints where owner='JETSPEED' and constraint_type='R' and
 status='DISABLED';
spool off
-- run the spooled result
set feedback on
@enable_fk.lst
```

Performing a Full Database Migration – SQL Server

Topics:

- Exporting The Data

- Preparing the Target Database

- Importing the Data

- Synchronizing User Accounts

Exporting The Data

Because most SQL Server DBAs use the SQL Server Enterprise Manager, this document outlines the steps to follow using that tool.

Create database backups of the source Accela and Jetspeed databases by individually right-clicking each database and selecting Tasks->Backup. This operation opens the Backup dialog as seen below:
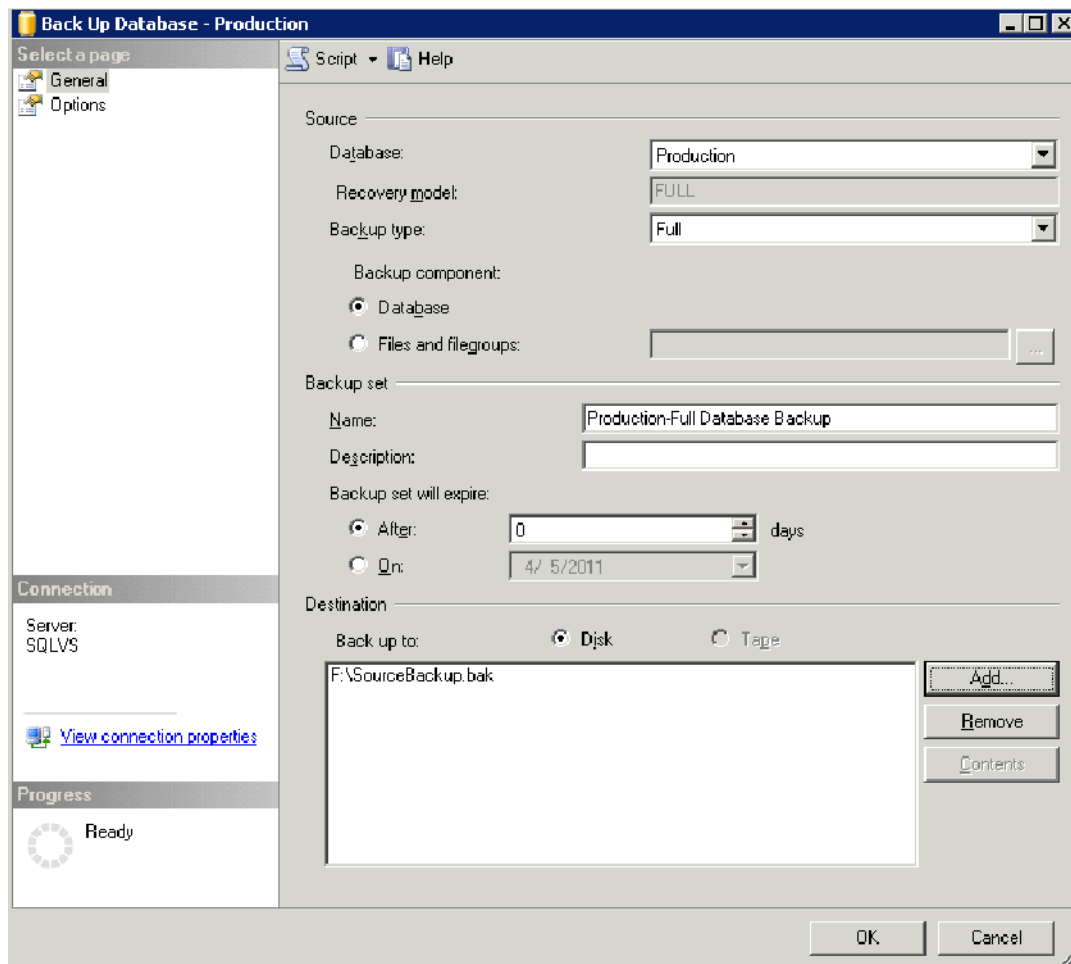
The import items to verify includes:

• A check that you set the Backup Type to Full and that the Backup Component equals Database

• A verification of the destination location and destination file name

On the Options tab, you can optionally select Verify the Backup.

Repeat this process for the JETSPEED database.

Preparing the Target Database

The Civic Platform installer creates the database tables, into which you migrate the configuration data and transaction data, in the target database.

1. Install Civic Platform to the target database (see the Civic Platform Installation Guide).

> 📝 **Note:**
>
> The Civic Platform version for the target environment must match the SP version number of the Civic Platform version for the source environment.

Importing the Data

If importing into an existing Civic Platform environment, record the environment settings before you import or restore into the target database (Copying and Setting Accela Environment Parameters).

Importing the data

1. At the target site, copy the source backup file into a location accessible to SQL Server.

2. Right-click the Databases tree item, on the right-hand side of the SQL Server Management Studio window, and choose "Restore Database."

   This operation opens a screen where you can select the backup file and specify a name for the restored database.

3. Perform this restoration for both the ACCELA and JETSPEED databases.

Synchronizing User Accounts

If the SQL Server instance already contains an Accela and Jetspeed SQL login, re synchronize those logins with the migrated data by performing the following query:

```
use <MyAccelaDatabaseName>
go
EXEC sp_change_users_login 'Update_one', '<MyAccelaDatabaseName>',
 '<MyAccelaDatabaseName>'
go
use <MyJetspeedName>
go
EXEC sp_change_users_login 'Update_one', '<MyJetspeedName>',
 '<MyJetspeedName>'
go
```

📝 **Note:**

   If the previous script fails, manually delete users from the Security section of each database, then add the users back under the main Security section of the database environment. Set the User Mappings to the correct database with the correct permissions.

Configuration Migration

You migrate configuration data by running scripts to extract the configuration data and import configuration data into specific Civic Platform database tables. The Oracle and SQL Server approaches for moving the extracted configuration data differ. After migrating configuration data, perform the post migration steps (Post Migration).

Extracting Configuration Data

The AA_objects database table contains information on the configuration tables and transaction tables you can migrate. To get a list of configuration objects (or transaction objects) to export, use the following query:

```
select object_name from AA_objects
where config_flag 'Y';
```

> 📝 **Note:**
> You can use the
>
> ```
> tran_flag 'Y'
> ```
>
> clause to get a list of transaction objects.

Migrating to an Oracle Database

For Oracle, use the dump and load function for the extracted configuration data.

Migrating to an SQL Server Database

For SQL Server, setup a link server relationship between the source databases and target databases, and execute a command like the following to move the data:

```
insert into prod.b.permit select * from dev.b.permit where
 serv_prov_code='ALAMEDA'
```

where:

```
prod.b.permit
```

is the module configuration in the target database

```
dev.b.permit
```

is the permit module configuration in the source database

```
ALAMEDA
```

is the agency name.

Post Migration

After you use the approach in Accela Database Migration or Configuration Migration to migrate configuration data and/or transaction data to the target database, restore Accela environment parameters to the target database (Copying and Setting Accela Environment Parameters).

You can restore target database parameters by running a script or by using the database tool and Civic Platform functionality. Copying and Setting Accela Environment Parameters provides the product paths (Where Configured column) for restoring target database parameters.

This document does not provide the SQL Server or Oracle scripts for setting the parameters.

Migration Scripts

Accela provides you with migration scripts to migrate some data. Accela attaches some migration scripts to Salesforce cases so you must obtain the scripts from Accela Customer Support and run the scripts to migrate data manually. The other scripts are embedded in the Civic Platform installer. When you run the installer, it migrates the data automatically.

Migrating Existing Contacts across Multiple Agencies

After a main agency, and its sub-agencies in a multiple-agency environment, configure the Standard Choice CONTACT_ACROSS_AGENCIES, agencies can share created contacts. To share contacts you created before setting up this Standard Choice, you need to run a migration script to migrate the existing contacts from one agency to another. For more information about the Standard Choice, see its listing in the *Civic Platform Configuration Reference*.

To migrate existing contacts across multiple agencies

1. Download the migration script *mig_acrossAgency_oracle.sql* attached to Salesforce case 13ACC-02765.

2. Open the script and locate Line 166.

```
165     --Execute Procedure
166     EXEC MIG_CONTACTACROSS_AGENCIES ('CONTACT_A');
```

3. Replace 'CONTACT_A' with the actual agency code of one of the agencies that share contacts, and then save your changes.

   > **Note:**
   >
   > The Standard Choice CONTACT_ACROSS_AGENCIES defines which agencies share contacts between each other. The script first makes the existing contacts from each agency available to the agency specified in the script. The script then copies all available contacts from that agency to each of the other agencies that you define in the Standard Choice.

4. Use /SQL*Plus to run the script.

Data Manager

Data Manager is a tool for migrating reference and configuration data across different agencies and environments (from test to production, for example). Data Manager supports the migration of all configuration data (except where otherwise noted), record types, and associated data elements in Civic Platform and Citizen Access, while maintaining the integrity of record sequences and key values.

Related Links

Navigating the Data Manager Panel

Exportable and Importable Data Element Information

Managing Export Jobs

Managing Import Jobs

Navigating the Data Manager Panel

When you create an export job or import job, you determine the data elements included in the job file, the target agency and target module, and the date and time to run the job. The Data Manager panel is the working area where you can create import jobs and export jobs.

To go to the Data Manager panel

1. Click the **V360 Admin** main link in the source agency or target agency.

2. In the **Setup** portlet, click the **Administration** item and choose **AA Admin** from the drop-down menu.
    Civic Platform displays the Record Types and Data Manager panel.
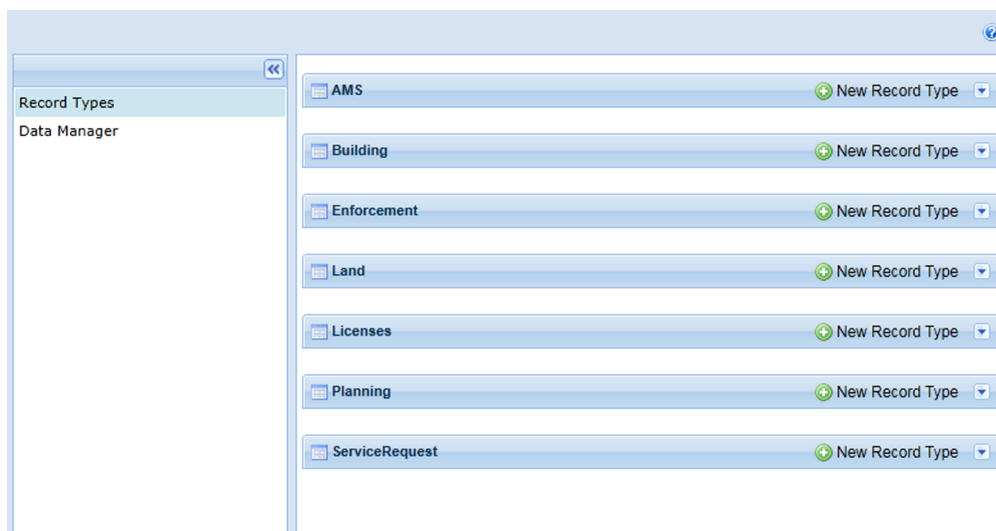
3. Click the **Data Manager** link in the navigation panel.
    Civic Platform displays the Data Manager panel.

4. Click the down arrows next to the New Export Job and New Import Job buttons to expand the lists of existing export job and import job.

Figure 1: Data Manager Panel illustrates the Data Manager Panel with the expanded lists of export jobs and import jobs.
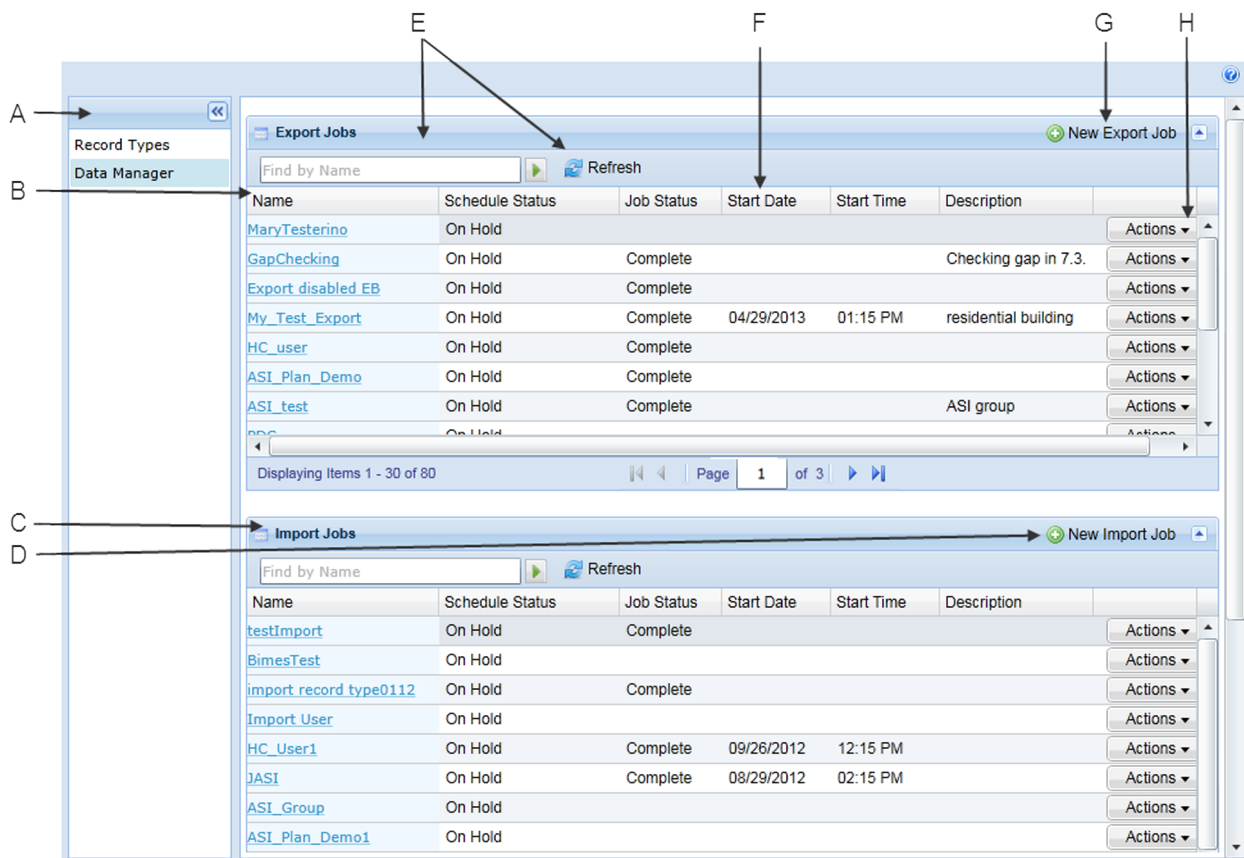

Figure 1: Data Manager Panel

A   **Navigation Panel.** Use the Navigation panel to access the Record Type panel and the Data Manager panel.

B   **Export Jobs Panel.** This panel manages export jobs and related details.

C   **Import Jobs Panel.** This panel manages import jobs and related details.

D   **New Import Job.** Click this button to create a new import job, or click the down arrow beside the button to expand or fold the existing import jobs.

E   **Filter or Refresh the List.** Enter text in the filter field to filter the display list, or click the Refresh button to refresh the list, especially, the job status of some job.

F   **Column Headers.** Click a column header to activate the column filter, with which you can sort columns alphabetically, show and hide specific columns, and group the display based on column names.

G   **New Export Job.** Click this button to create a new export job, or click the down arrow beside the button to expand or fold the existing export jobs.

H   **Actions Menu.** Use the Actions Menu to start, schedule, stop or complete other actions related to an export job or import job.

Exportable and Importable Data Element Information

Topics

- Civic Platform Record Type Data

- Civic Platform Configuration Data

- Civic Platform Reference Data

- Citizen Access Configuration Data

- Accela Civic Platform - Asset Configuration Data

When you start an export job or import job, the navigation panel in Data Manager (see Figure 2: Exportable and Importable Data Element Types in Navigation Panel) shows the types of core configuration data elements you can export or import. This section provides details on what information you can and cannot include for each type of data elements in the export and import.
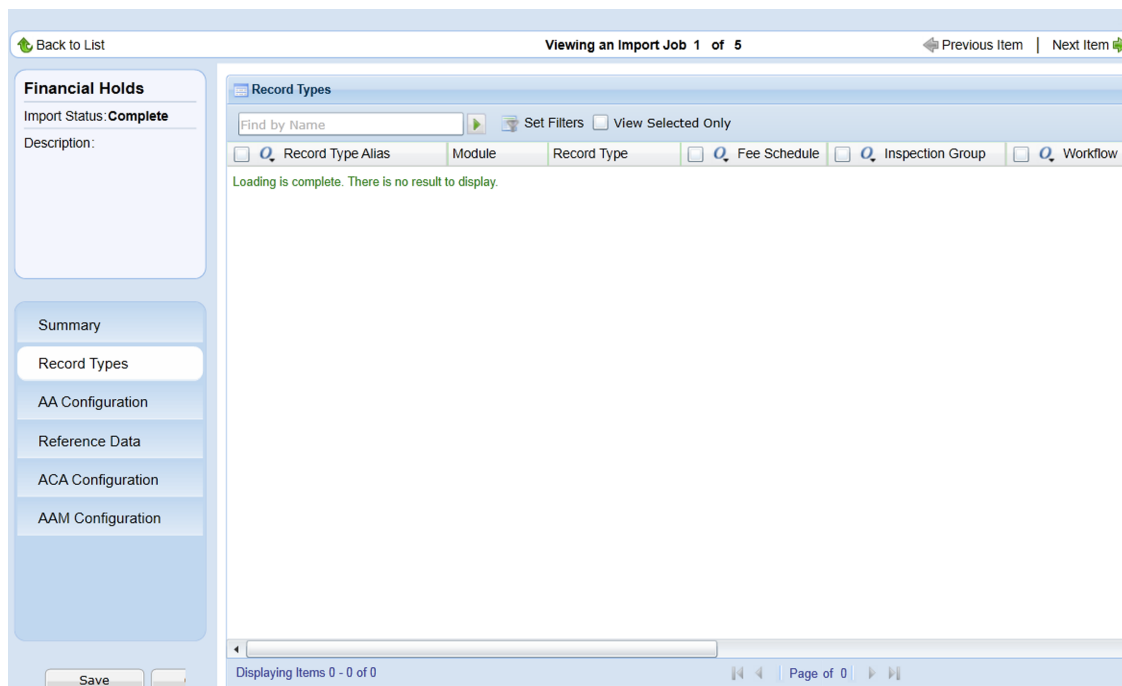

Figure 2: Exportable and Importable Data Element Types in Navigation Panel

If data element associations exist with other configurations, you can export the data elements together with their associations. For example, for record types, you can choose to export the record type definitions together with their associated fee schedules, workflow, SmartChoice group, and so forth.

Civic Platform Record Type Data

You can include almost all the configuration settings of record types in an export job or import job. For details, see Table 2: Exportable/Importable Record Type Data.

When you select record types for inclusion in an import or export job, the related data from the record type is automatically selected in the relevant configuration sections of the tool. For example, if a record type is selected and saved, the same Fee in that record type is automatically selected in the Fee section of AA Configuration.

Table 2: Exportable/Importable Record Type Data

Application Status Group	This column displays the application status group associated with each record type. When you select Application Status Group for a record type, Data Manager includes the associated application status group settings in the export job or import job.
ASI Group	This column displays the application-specific group, if any, associated with each record type. When you select ASI Group for a record type, Data Manager includes ASI-related data in the export job or import job, including: • ASI Group • ASI Sub Group • ASI Security • ASI Table Group • ASI Drill-down Configuration • ASI Form Layout • Shared Drop-down lists
ASI Lookup Table	This column indicates whether a record type has one or more associated ASI lookup tables. When you select ASI lookup table for a record type, Data Manager includes the associated ASI lookup tables in the export job or import job.
Audit Frequency	This column enables you to include the audit frequency associated with the record type in an export or import job. When you select audit frequency for a record type, Data Manager includes the audit frequency configured in record type maintenance.
Citizen Access	This column indicates whether to enable the record type for Citizen Access. When you select Citizen Access for a record type, Data Manager includes these configuration settings in the export job or import job: • Application-type enabled for Citizen Access • Enable Renewal • Also Enable Issuance • Renewal CAP Type • Page Flow Code for Citizen Access • Post Submission Updates in ACA (setting that enables citizens to edit records in Citizen Access) • Document Code for Citizen Access data
Comment Group	This column indicates whether the record type includes a comment group association.

When you select Comment Group for a record type, Data Manager includes the comment group-related data in the export job or import job.

Condition	This column indicates whether the record type includes a condition association.
	When you select Condition for a record type, Data Manager includes these condition-related data in the export job or import job:
	• Condition Template Attributes, with template table values
	• ASI Group (which associates with the condition)
	• Condition Type Security
Default Clone Options	This column enables you to include the default clone options configured for the record type in an export or import job.
	Default clone options enable you to select which data you want to copy from the source record to the destination record when you clone a record.
Document	This column displays the document group code associated with each record type.
	When you select Document for a record type, Data Manager includes the associated document group settings, and the template attributes and template table values, in the export job or import job.
	📄 **Note:** If the document group has associated document templates, you must also check the corresponding ASI groups of the templates in the Application Specific Info page under AA Configuration.
Fee Schedule	This column displays the fee schedule associated with each record type.
	When you select Fee Schedule for a record type, Data Manager includes these fee-related data in the export job or import job:
	• Fee Group
	• Fee Items (including fee item group, fee payment period, and fee calc)
	• Valuation Calc
	• Fee Calc (including the fee calculation criteria, and associated ASI or ASI table)
	• Payment Period
	• Manager Schedule
Inspection Group	This column displays the inspection group associated with each record type.
	When you select the Inspection Group check box for any record type, Data Manager includes these inspection group settings in the export job or import job:
	• The associated inspection group and inspection type definitions
	• Inspection Type Security
	• Inspection Default Value Policy
	• Inspection Type and Status Security
License Verification	This column displays the license verification settings associated with each record type.
	When you select the License Verification check box for any record type, Data Manager includes these settings in the export job or import job:

- Education

- Continuing Education

- Examination

- License Verification

Meeting Type	This column indicates whether a record type includes associated meeting types.
	When you select Meeting Type for a record type, Data Manager includes the related meeting type settings in the export job or import job.
Module	This column displays the source module for the record type. If you include a record type in an export file or import file, Data Manager includes the module information.
Record Type Alias	This column displays the record type alias.
	When you select Record Type Alias for a record type, Data Manager includes all related data for the record type in the export job or import job. As needed, you can clear some data (such as inspection group).
Record Type	This column displays the record type in Group/Type/Subtype/Category format.
Record Type Instruction	This column displays the record type instruction flag.
	When you select record type instruction for a record type, Data Manager includes the content of the record type instruction configured in AA Classic > Application > Edit.
Renewal Information	You can include the renewal information, including expiration code, fee items and their payment periods, in the export job or import job.
Security and Permission	This column indicates whether a record type includes security and permission settings.
	When you select Security and Permission for a record type, Data Manager includes the related application type security and permission settings in the export job or import job.
Sequences	This column indicates whether a record type includes an associated sequence.
	When you select Sequences for a record type, Data Manager includes these sequence-related data in the export job or import job:

- Application Key Mask

- ID Mask

- Partial ID Mask

- Temporary ID Mask

- Receipt Mask

- Invoice Mask

SmartChoice	This column displays the SmartChoice Group associated with the record type.
	When you select SmartChoice for a record type, Data Manager includes the SmartChoice group definition in the export job or import job.
Workflow	This column displays the workflow process associated with the record.
	When you select Workflow for a record type, Data Manager includes these workflow data in the export job or import job:

- Task-specific Information

- Workflow Group

- Workflow Security

Civic Platform Configuration Data

You can include Civic Platform configuration data in an export job or import job, as outlined below.

- For the Civic Platform configuration information you can export or import, see Table 3: Exportable/Importable Civic Platform Configuration Data.

- Data Manager does not support exporting or importing the configurations in the following administration portlets in Civic Platform V360 Admin.

  - The Product License portlet

- Data Manager does not support exporting or importing the configurations in the following pages of Civic Platform Classic:

  - The Find Application Profile and General Profile pages under Application

  - The Trust Account pages under Fees

Table 3: Exportable/Importable Civic Platform Configuration Data

Address Type Group	This page displays the list of address type groups. If you include an address type group in the export file or import file, Data Manager includes the following data: • Address Type Group • Record Status • Updated Date • Updated By • Group Detail • Address Type Info
Application Specific Information	This section displays the list of application spec info (ASI) configuration settings. If you include ASI configuration settings in the export file or import file, Data Manager enables you to include the following data: • Application Specific Info • Application Specific Info Table • ASI Drill Down • ASI Form Layout Editor • ASI Lookup Tables • ASI Security/Permissions • ASIT Column Alias
Audit Log	This page displays the list of audit log configurations. If you include an audit log configuration in the export file or import file, Data Manager includes the parameters of the audit log configured by an administrator for:

- Inspection Detail

- Record Detail

- Record Status History Logs

Batch Engine	This page displays the list of batch jobs (excluding data manager batch jobs). If you include a batch job in the export or import file, Data Manager includes the parameters defined for the batch job, including: • Name • Job Type • Script Code • Job Schedule (check box)* • Parameters (check box)* • Log (check box)* * If checked, all data associated with that tab is included in the import / export
Calendars	This section displays the list of calendar configurations. If you include a calendar in the export file or import file, Data Manager includes the following data: **Inspection Calendars:** • Details • Districts • Permissions • Inspection Types **Meeting Calendars:** • Type • Recurrence • Details • Security **User Calendars:** • Calendar Details and Items **Holiday Calendars:** • Calendar Details and Items **Supervisor Maintenance** **Meeting Type Maintenance**
Communication Manager Account Settings	This page displays the list of Communication Manager account settings. If you include account settings in the export file or import file, Data Manager includes the parameters defined for the account, including: **Email Accounts:**

- Account Details

- Permissions

SMS Accounts:

- Account Details

- Permissions

Communication Manager - Alerts	This page displays the list of alerts. If you include an alert in the export or import file, Data Manager includes the parameters defined for the alert, including: **Message Details:** • Message Type • Message Content • Duration • Duration Unit • Status (enabled/disabled) • Alert ID **Recipient Details:** • Recipient Type • Recipient Key (user details) **Alert Rules (associated with the alert):** • Name • Description • Type **Enabled (Y/N)**
Communication Manager - Alert Rules	This page displays the list of alert rules. If you include alert rules in the export or import file, Data Manager includes the parameters defined for the alert rule, including: **Details (including expression parameters):** • Name • Description • Type • Enabled (Y/N) • Open Parenthesis • Object • Property • Relation Operator

- Literal Value

- Close Parenthesis

- Logical Operator

Associated Objects:

- Alerts associated with the alert rule

Communication Manager - Announcements	This page displays the list of announcements. If you include announcements in the export or import file, Data Manager includes the parameters defined for the announcement, including: **Announcement Details:** • Message Title • Message Type • Content • Date (Start) • Date (End) • Status • Time (Start) • Time (End) • Display Message in (ACA Only, AA Only, or Both) **Recipient Details:** • Recipient Type (including module and user group mapping) • Recipient
Communication Manager - General Settings	This page displays the list of Communication Manager general settings. If you include general settings in the export file or import file, Data Manager includes the parameters defined for each of the following: • Calendar Server Setting • Attachment (EDMS) Server Setting • Email (Exchange) Server Setting • SMS Server Settings
Communication Manager - Notification Templates	This page displays the list of notification templates. If you include a notification template in the export file or import file, Data Manager includes the parameters defined for the template, including: **General Details:** • Template Name • Description

- Content

Email Content:

- From

- To

- Cc

- Bcc

- Title

- Importance

- Content

- Display in ACA check box

- Display as Alert check box

- Save as Attachment check box

- Attach To

- Document Group

- Document Category

- EDMS Name

SMS Content:

- From

- To

- Content

Conditions and Condition Types	This page displays the list of condition types. If you include a condition type in the export file or import file, Data Manager includes the following data:

Conditions:

- Condition

- Inspection

- Permission

- Record Type

- Workflow

Condition Types:

- Standard Conditions

- Condition Group

- Condition Type Security

- Condition Status

- Generic Template

- Template Attribute (R2CHECKBOX)

- Template Table (R2CHECKBOX)

- ASI, and ASI Table

Console Configuration	This page displays the list of consoles. If you include a console in the export file or import file, Data Manager includes the following data: • Customized console configuration, with assigned console user(s).
Contact Manager	This section displays the list of contact configurations. If you include a contact configuration in the export file or import file, Data Manager includes the following data:Contact Type Settings: **Contact Type Settings:** • Record Contacts • Security Setting (module level permission & user group level permission) **Identity Settings:** • Contact Address Identity settings • Reference Contact Identity Settings
Content Customize	This page displays the list of customized messages that you can include in the export file or import file.
Create New Object Menu	The Civic Platform console provides a "Create New" button on the toolbar that opens a drop-down menu of options for creating new objects. This page displays the "Create New" menu configurations that you can include in the export file or import file.
Data Filter & Query	This page displays the list of data filters that you can include in the export file or import file, including: • Data Filters • Global QuickQuerie • My QuickQueries
Dictionary	This page displays the list of customized dictionary items that you can include in the export file or import file, including: • Word • Description • Created By • Created Time
Document	This page displays the list of document groups. If you include a document group in the export file or import file, Data Manager includes the following data:

- Document type, including document group

- Third party document review tool integration configuration

- Document status auto-update settings

EDMS Security	This page displays the list of EDMS security settings. If you include EDMS security settings in the export file or import file, Data Manager includes the following data:

- EDMS Server Name

- Security Settings

Event Manager	This section displays the list of events and scripts. If you include events and scripts in the export file or import file, Data Manager includes the following data:

- Events

- Scripts

- Master Scripts, including custom scripting and the following INCLUDE statements that master scripts require to run successfully in the target environment:

- INCLUDES_ACCELA_FUNCTIONS

- INCLUDES_ACCELA_FUNCTIONS_ASB

- INCLUDES_ACCELA_GLOBALS

- INCLUDES_CUSTOM

Expression Builder	This page displays the list of expressions. If you include an expression in the export file or import file, Data Manager includes the following data:

- Expression Calculations, with expression function

- Expression Criteria

- Expression Field

- Expression Portlet

- Associated EMSE Script

- ASI Group (for ASI Group Entry)

> **Note:**
> The expressions in the following target portlets are supported: ASI, ASIT, Fee, Payment, Condition, Ref Condition, Asset, Asset CA, WorkFlow, and Record Detail.
>
> When you export or import an expression for a portlet, remember to select the corresponding item in the portlet in the export or import job as well. For example, when you export an expression for a workflow, you need export the workflow besides the expression.

External User Policy	This page displays Active Directory server configurations. If you include Active Directory server configuration in the export file or import file, Data Manager includes the following data:

- Provider URL

- Provider Port

- Access User Name

- Access User Password

- Access User OU

- Access User DC

- OU Filter

- Additional Directory Entries

- Status

Fee Schedule	This page displays the list of fee schedules. If you include a fee schedule in the export file or import file, Data Manager includes the parameters of the fee schedule configured by an administrator.
Finance	This section displays occupancy configurations. If you include occupancy configurations in the export file or import file, Data Manager includes the following data: - Occupancy configuration details - Occupancy Group configuration details
Form Portlet Designer	This page displays the list of customized forms and lists. If you include a customized form or list in the export file or import file, Data Manager includes the following data: - Filter Level, with filter view element and filter attribute - General Profile (for record type form portlet designer)
GIS	This page displays the list of GIS configurations. You can include the following data in an import or export job: - Dynamic Themes - GIS Features - Map Object Attribute Mappings - Proximity Alerts - Services - Search Fields - Reference User Parameters
Inspection Groups	This page displays the list of inspection groups. If you include an inspection group in the export file or import file, Data Manager includes the following data: - Inspection Result Group - Inspection Grade Groups

- Checklist Definition, with checklist items (including ASI group, checklist status group, standard comment group)

- Inspection Discipline

- Inspection Process

- Inspection Type Category

- Inspection Security (including inspection type security, inspection type and status security, inspection group security, inspection status security, and inspection default value security)

- Inspection Type Recurrence and Relationship Setting

- The following data are optional to include:

- Checklist Group

- Inspection Standard Comment

- Inspection Standard Condition

- Security

License Certifications	This section displays the list of license certification portlets. If you include license certifications in the export file or import file, Data Manager includes the following data: • Continuing Education • Education • Examination
Link Portlets	This page displays the list of link portlets. If you include a link portlet in the export file or import file, Data Manager includes the following data: • Portlet Name • Portlet System Name • Portlet Description
Logo	This page displays an agency's custom logos. If you include logos in the export file or import file, Data Manager includes the following data: • Agency • Logo Type • Logo URL • File Name • Description
Menu Navigation	This page displays the list of menu templates. If you include a menu template in the export file or import file, Data Manager includes the following data: Menu Templates, with menus, menu items and menu level definitions.

My Navigation	This page displays the list of flow diagrams. If you include a flow diagram in the export file or import file, Data Manager includes the following data:
	• Flow Node, with portlet definition
	• Recipient
Portlet	This page displays the list of portlets. If you include a portlet in the export file or import file, Data Manager includes the following data:
	• Portlet Description
	• Portlet URL
	• Portlet Page ID
	• FID
Public User	This page displays the list of public users of the source agency. If you include a public user in the export file or import file, Data Manager includes the following data:
	• User ID
	• Civic Platform User ID
	• Change Password at Login radio button
	• Cell Phone
	• E-mail
	Note: passwords and security questions are NOT exportable/importable.
Process Validation	Workflow process validation is another aspect of conditions where you can extend the conditions that currently exist for an application to halt the workflow process related to that application, based on condition results.
	If you include process validation in the export file or import file, Data Manager includes the process validations configured in the Conditions portlet.
Record Type Filter	This page displays the list of record type filters. If you include a record type filter in the export file or import file, Data Manager includes the following data:
	• Module
	• Action
	• Filter Name
	• Status
	• Order
	• Record Types (associated with the filter)
Regional Settings	This page displays the list of regional settings. If you include regional settings in the export file or import file, Data Manager includes the following data:
	• Country/Region
	• Default Country/Region

- State/Province

- Phone Number Country Code

- Use Zip Code

- Zip Code Mask

- Phone Number Mask

Reports - Settings	This page displays the list of report settings. If you include report settings in the export file or import file, Data Manager includes the following data: **Report Services:** • Report service name • Report service type • Report output formats • Report service list URL • Report service URL **Printers:** • Printer Name • Printer List **Variables:** • Variable name • SQL statement **Ad-hoc Report Data Sources:** • Report data source name • Report permissions (name/type)
Reports - Ad-hoc Reports	This page displays ad-hoc reports. If you include ad-hoc reports in the export file or import file, Data Manager includes the following data: • Report name • Report category • Filter Field • Operator • Values • Results
Reports - Reports by Name	This page displays the list of reports configured in Report Manager. If you include these reports in the export file or import file, Data Manager includes the following data:

- Report Details

- Parameters, including variables, report services, and ad-hoc data sources.

- Permissions

- Portlets, including menu criteria

- Workflow

Reports - SmartCharts	This page displays the list of SmartCharts. If you include SmartCharts in the export file or import file, Data Manager includes the following data:

- SmartChart Title

- Show Title (y/n)

- Chart Type

- Query

- Thumbnail Width

- Thumbnail Height

- Category Label

- Value Label

- Show Label (y/n)

- Show Label (y/N)

- Background Color

- Show Legend

- Range Start

- Warning Start

- Critical Start

- Range End

- Data Source Type

- List Portlet

- Module

- Column

- Statistical Function

- Value

- Numeric Column

- Date Operand 1

- Operator

- Date Operand 2

- Show Tick Label

- Cache Time (seconds)

Reports - SmartChart Queries	This page displays the list of SmartChart queries. If you include SmartChart queries in the export file or import file, Data Manager includes the following data: • Query Name • Query SQL
Sequences and Masks	This page displays the list of sequences and masks you can include in the export file or import file, including the following data: **Masks:** • Mask name • Sequence type • Sequence name • Pattern **Sequences:** • Sequence name • Sequence type • Interval type • Start Value • Increment by
Server Constant	This page displays the list of server constant settings you can include in the export file or import file.
Service	This page displays multi-agency service settings, which enable you to offer services from multiple agencies to public users through ACA. If you include multi-agency service settings in the export file or import file, Data Manager includes the configurations established in V360 Admin > Agency Profile > Service.
Set Types	If you include set type configurations in the export file or import file, Data Manager includes all of the following data: • Set Type Details • Set Status • Permissions • Scripts
Shared Drop-down List	This page displays shared drop-down lists. If you include shared drop-down lists in the export file or import file, Data Manager includes the following data:

- Shared Drop-down List Details tab

- Values

- Associations

Standard Choices	This page displays the list of Standard Choice settings. If you include a Standard Choice in the export file or import file, Data Manager includes the following data:

- Standard Choice Description

- Standard Choice Name

- Standard Choice Status

- Standard Choice Type (System Switch, Shared drop-down, or EMSE)

📝 **Note:**

> Previously, only 999 Standard Choices would load in Data Manager, even if more were configured. However, a new Standard Choice has been created to solve this problem. It's called DATA_MANAGER_MAX_RECORD_NUMBER, so be sure to enable it so ALL your Standard Choices are available in the tool.

Standard Comment	This page displays the list of pre-defined comments, with their associated comment groups, that you can include in the export file or import file.
Structure and Establishment	This page displays structures and establishments. If you include structures and establishments in the export file or import file, Data Manager includes the following data:

- Detail (tab)

- Condition (tab)

- Parcel (tab)

- Address (tab)

- Owners (tab)

- Structures and Establishments (tab)

Social Media	This page displays the list of social media integrations. If you include a social media integration in the export file or import file, Data Manager includes the following data:

- Access Token Key

- Access Token Secret

- Proxy Port

- Proxy Host

Text Settings	This page displays the list of customized display text. If you include a customized display text in the export file or import file, Data Manager includes the following data:

- Text Setting, with text level

Time Accounting	This page displays the list of time accounting types. If you include a time accounting type in the export file or import file, Data Manager includes the following data:

- Time Accounting Type

- Time Profile Type

- Time Accounting Type Security

- Time Accounting Groups, with group security

User Profile	This page displays the list of user profiles. If you include a user profile in the export file or import file, Data Manager includes the following data:Users:

Users:

- Organization

- User Profile, with cost item and cost rate definition

- User Security

- User Group

- Staff, with department type

- User Discipline

- User District

- Delegate users, including delegate agency, delegate user ID, parent agency, parent user ID, allow delegate user login, status

User Groups:

- Name

- Module

- Function Identification (FID) Configuration

Organizations

- Organization structure

- Department

- Status

Workflow and Activity	This page displays the list of workflows and activities. If you include workflows and activities in the export file or import file, Data Manager includes the following data:Activity Specific Info configuration, including:

Activity Specific Info configuration, including:

- Activity Specific Info Group Code

- Activity Specific Info Subgroup

- Group Display Order

- Field Label

- Field Type

- Default Value

- Unit

- Required Flag

- Fee Indicator

- Searchable Flag

- Required Flag

- Display Len

- Status

- Max Len

- Activity Specific Info Subgroup Alias

- Shared drop-down list

Activity Types, including:

- Activity Type

- Activity Specific Info Group Code

- Description

- Reference Type

- Active Flag

Email Messages:

- Contents Code

- Message Type

- Message Subject

- Message Content

- Record Status

Process:

- Workflow Process Code

- Workflow Security

- Process Note, with email message and email setting

- Process Report

Task-Specific Information (TSI)
TSI Form Layout Editor
Workflow:

- Task items, with workflow standard condition, task activity, task status, task security, task status security, associated TSI group and sub group, and associated standard comment group, process proximity alert

- GIS proximity alerts

- Workflow Metadata

- Email Setting

- Email Messages

- Activity

- Report Setting

Workload

Civic Platform Reference Data

You can include reference licensed professionals data and APO (Address, Parcel, Owner) data in an export job or import job.

- For the detailed reference information you can export or import, see Table 4: Exportable/Importable Civic Platform Reference Data.

- Data Manager does not support exporting or importing the following reference data.

  - Structure template, APO template, or address type group settings configured in Civic Platform Classic Administration

  - Parcel genealogy configured in the Establish Genealogy page in Civic Platform Classic Administration

Table 4: Exportable/Importable Civic Platform Reference Data

Address	You can include all reference addresses or a selection. If you include reference addresses in the export file or import file, Data Manager includes all reference address form fields and associations.
APO Form Layout Editor	This page displays the list of APO form layouts. If you include APO form layouts in the export file or import file, Data Manager includes the following data: • APO Screen Name • APO Description • APO Type • Permissions Y/N Checkbox
APO Template	This page displays the list of APO templates. If you include an APO template in the export file or import file, Data Manager includes the following data: • APO Template Attributes, with attribute values and shared drop-down lists. If an APO template includes an associated APO form layout, you can select the Y check box in the APO Form Layout column to export or import the associated APO form layout data.

Parcel	You can include all reference parcels or a selection. If you include reference parcels in the export file or import file, Data Manager includes all reference parcel form fields and associations.
Owner	You can include all reference owners or a selection. If you include reference owners in the export file or import file, Data Manager includes all reference owner form fields and associations.
Licensed Professional	You can choose to include reference licensed professional records in the export file or import file, including the following data: • Status License # • License Status • License Type • Business Name You also have the option to include the following data: • People Info Table, with people info table subgroup and relevant drill-down configuration • Info Table, with info table subgroup, info table field settings and info table values • People Template, with attributes and values • People Attribute

Citizen Access Configuration Data

You can include Citizen Access configuration data in an export job or import job. For the detailed configuration information you can export or import, see Table 5: Exportable/Importable Citizen Access Configuration Data.

> **Note:**
> Data Manager may fail to export and import some default settings in ACA configuration.

Table 5: Exportable/Importable Citizen Access Configuration Data

ACA Settings	Select ACA Settings include the following data in an export job or import job: • ACA Policy Settings (excluding report display controls) • ACA Permission • Associated Standard Choice • Agency Event, with associated EMSE scripts
Custom Form and Text	Select the items in this section, such as General Page and Module Page, to include custom form and text settings in an export job or import job. Data Manager includes the following data: • Application Status • Application Type Permission • Custom Component

- Text Level, with customized labels

- Filter Level

- Filter View Element

- Filter View, with filter view definition and filter view elements

E-mail Settings	Select each custom email template you want to include in an export job or import job.
Form Designer Settings	Select each filter screen you want to include in the export file or import file. Data Manager includes the following data: • Filter Screens, with filter screen elements and filter screen permissions
Record Type Filter Settings	This section displays the Record Type Filter Settings. Each filter and its related module displays in this section. Select each Record Type Filter you want to include in an export job or import job.

Accela Civic Platform - Asset Configuration Data

You can include the following Accela Civic Platform - Asset configuration data in an export job or import job.

Table 6: Exportable/Importable Accela Civic Platform - Asset Configuration Data

Asset Types	This page displays the list of asset types. If you include an asset type in the export file or import file, you can include the following optional data: • Asset ID Mask • Attribute Template (if any attribute template exists) • Asset Type Security
Asset Form Layout Editor	This page displays the list of form layouts. If you include form layouts in the export file or import file, Data Manager includes the following data: • Screen Name • Description • ASI Group Code
Attribute Type	This page displays the list of asset template definitions. If you include an asset template definition in the export file or import file, you can include the following optional data: • Attribute, with their values • Attribute Table • Attribute Template Form Layout
Condition Assessments	This page displays the list of condition assessment types. If you include a condition assessment type in the export file or import file, Data Manager includes the following data: • Condition Assessment Description • The following data are optional to include: • Condition Assessment Attribute

- Condition Assessment Observation Attribute

- Rating Type (including rating type, and expressions and conditions associated with rating type)

- Asset Type

Cost Group	This page displays the list of cost groups you can include in the export file or import file. Data Manager includes the following data:

Cost Group Detail:

- Group Name

- Description

- Record Status

Associated Cost items:

- Cost Type

- Cost Item

- Unit of Measure

- Description

- Cost Subgroup

- Default Cost Account

- Record Status

Recipient:

- Agency Level Permission

- Module Level Permission

- User Group Level Permission

- Department Level Permission

- User Level Permission

Cost Items	This page displays the list of cost items you can include in the export file or import file. Data Manager also includes the following data:

- Cost Rate

Part Contact	This page displays the following part contact details you can include in the export or import file.

- Contact Flag

- Business Name

- Address 1

- Address 2

- Comments

- Contact First Name

- Contact Middle Name

- Contact Last Name

- Contact Title

- Contact Type

- Comments

- E-mail

- Fax

- Phone

- Record Status

- City

- State

- Zip

- Terms

Part Locations	This page displays the list of part locations you can include in the export or import file.
PM Schedule	This page displays the list of PM schedules. If you can include a PM schedule in the export file or import file, Data Manager includes the following data: - Work Order Template (which associates with PM schedule) The following data is optional to include: - Hold Event - Linked QuickQuery (Asset Data List QuickQuery)
Work Order Template	This page displays the list of work order templates. If you include a work order template in the export file or import file, you can include the following optional data: - Work Order Costing - Work Order Type - Cost Item - Work Order Task
Cost Items	This page displays the list of cost items you can include in the export file or import file. Data Manager also includes the following data: - Cost Rate 📝 **Note:** Data Manager currently does not support the export and import of asset resource and human resource cost items.

Managing Export Jobs

This section describes how to create an export job, configure the data elements for export, and run the job. You can schedule the job to run at a specific date and time. You can also manually run the job.

Topics:

- Planning Export Jobs

- Creating an Export Job

- Adding Data Elements to an Export Job

- Scheduling an Export Job

- Working with the Export Jobs Actions Menu

- Downloading Export Jobs

Planning Export Jobs

One export job can contain several types of data elements. To ensure the performance and success of the export jobs and import jobs, do not exceed 170 megabytes for the export file size. If the export file size exceeds 170 megabytes, create several smaller export jobs that address different subsets of the entire desired export.

Creating an Export Job

Create an export job for extracting the data elements from a Civic Platform implementation.

To create an export job

1. Open the **Data Manager** panel. For instructions, see Navigating the Data Manager Panel.

2. Click the **New Export Job** button in the Export Jobs panel.
    Civic Platform displays the Create New Export Jobs page.

3. Complete the fields that display.

Description	A description of the export job.
E-mail	Your email address.
Name	A name that identifies the export job.
Select Agency	The source agency used to create the export job. The default agency name that displays in this field is the current agency. If you have multiple agencies and you log in using the parent agency, then all the child agencies display in this drop-down list.

4. Click the **Save** button.

Civic Platform displays the Export Job Summary page. See Figure 3: Export Job Summary Page .

Figure 3: Export Job Summary Page

Adding Data Elements to an Export Job

All the data elements available for export in each data element page display with check boxes. By default, the check boxes are not selected. If you select the check box for an data element, you add it into the export job.

To add data elements to an export job

1. Go to the Export Job Summary page. For instructions, see Creating an Export Job. To view the Export Job Summary page, see Figure 3: Export Job Summary Page .

Automation displays the exportable data element types in the left navigation panel.

For details on the configuration data that you can export for each data element type, see Exportable and Importable Data Element Information.

2. Click the type of data elements you want to add to the export job in the left navigation panel, for example, **Record Types**.

If you click the **AA Configuration**, **Reference Data**, or **AAM Configuration** link in the navigation panel, their sub types display under the link. You can then click a sub type and you can view the data elements in it.

When you select record types for inclusion in an import or export job, the related data from the record type is automatically selected in the relevant configuration sections of the tool. For example, if a record type is selected and saved, the same Fee in that record type is automatically selected in the Fee section of AA Configuration.

Note:

If the selected type contains many data elements, Data Manager can take some time to load all the data.

Civic Platform loads the list of data elements for the type selected.

3. Do one of the following to filter long data elements list:

- Enter text in the **Find by** field to display only the items that contain the text.

- Select the **All Selected** option to display only the items that you have selected in the list.

- For the Record Types data element page only, click the **Set Filters** button, and set filter criteria in the popup Record Type Filter page to filter the record types that display.

- Click the column headings to activate the column filters. Use column filters to sort columns alphabetically, show and hide specific columns, and group the display based on column names.

4. Select the check boxes next to the data elements you want to export.

   Each element entry and its associated element (for example, record type and its associated fee schedule) show in the list with check boxes. You can either click the check boxes individually to select/ clear the data element one by one, or click the column name to select/clear all at one time.

   You can select a data element entry but clear the associated elements in it to exclude the export of the associated elements.

   If Civic Platform associates an element with multiple data element entries (a fee schedule associated with multiple record types, for example), you can add the element to the export job even though you only select one of its occurrences.

5. Click the **Save** button in the navigation panel to save your selection in the current data element type.

6. Repeat the previous steps for all the data element types you want to add to the export job.
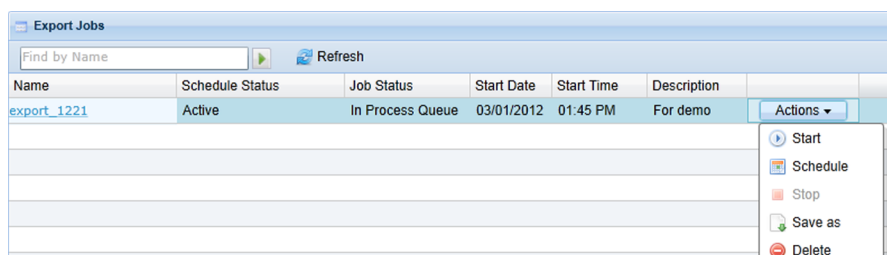
Scheduling an Export Job

You can schedule an export job before, during, or after you configure the export job. The schedule sets the date and time to run the export job. If necessary, you can hold the schedule to prevent the export job from running.

To schedule an export job

1. There are two ways to schedule an export job.

   • Open the Data Manager panel, and select Schedule from the Actions list for the desired export job.

   • Go to the Export Job Summary page which contains the schedule section. For instructions, see Creating an Export Job.

   Civic Platform shows the schedule section.

2. Complete the fields in the schedule section.

Date	Enter the date or use the calendar icon to select the date to automatically run the export job. The default date that displays is the current date.
	This field only works when the **Scheduled Status** is Active.
Time	Select the time when you want to run the export job. The default time that displays is the current agency's time.
	This field only works when the **Scheduled Status** is Active.
Schedule Status	Select the status as On Hold or Active. If the status is On Hold, you can only save the export job, but cannot run it, either on the scheduled time or manually. If the status is Active, the export job runs on the scheduled time. You can also run the job manually.

3. Click the **Save** button in the navigation panel to save the schedule settings.

Working with the Export Jobs Actions Menu

Use the export jobs Actions menu in the list of existing export jobs (see Figure 1: Data Manager Panel) to manage and run export jobs. You can use the Actions menu to start and stop an export job, schedule an export job, delete an export job, and download an export job to your local drive.

The status fields at each export job, including Schedule Status, Job Status, Start Date and End Time, show the job statuses from your previous actions.

• You may have set the schedule status of an export job to be either Active or On Hold.

  If the schedule status is Active, the job can run on the scheduled date and time. If the schedule status is On Hold, the job cannot automatically run.

• The following job statuses are possible for an export job.

- Completed. The job completed successfully as configured.

- In Process Queue. You scheduled the job to execute at a later time.

- Terminated. The job terminated without completing.

- Running. The job is currently running.

- Stopping. The job stopped and you can click Start to resume the job.

- The start date and time are the schedule that you created for the job.

The commands available in the Actions menu for a job vary depending on the current statuses of the job. Table 7: Export Jobs Actions Menu Commands describes the Actions menu commands of export jobs and explains how the schedule status and job status of each export job affect the availability of menu commands.

Table 7: Export Jobs Actions Menu Commands

Command	Schedule Status	Job Status	Command Effect
Delete	Active	Complete In Process Queue Terminated	The Delete button is active and you can delete the export job from the database
Delete	Active	Running Stopping	The Delete button is inactive.
Delete	On Hold	Any	The Delete button is active and you can delete the export job from the database.
Save As	Active	Complete In Process Queue	The Save As button is active and you can download an export job to your local drive.
Save As	Active	Running Stopping Terminated	The Save As button is inactive.
Save As	On Hold	Any status besides Complete	The Save As button is inactive.
Schedule	Active	Complete Terminated In Process Queue	The Schedule button is active and you can schedule the date and time when you want the export job to run.
Schedule	Active	Running Stopping	The Schedule button is inactive.
Schedule	On Hold	Any	The Schedule button is active and you can schedule the date and time when you want the export job to run.
Start	Active	Complete Terminated In Process Queue	The Start button is active and you can manually run the export job (see Note below).
Start	Active	Running Stopping	The Start button is inactive.

Command	Schedule Status	Job Status	Command Effect
Start	On Hold	Any	The Start button is active and you can manually run the export job (see Note below).
Stop	Active	Complete In Process Queue Stopping Terminated	The Stop button is inactive.
Stop	Active	Running	The Stop button is active. If you click the Stop button while the job is running, Data Manager terminates the job and updates the job status to Terminated.
Stop	On Hold	Any	The Stop button is inactive.

Note:

Data Manager allows you to manually start a job even if the job schedule is undefined or the schedule status is On Hold. If you schedule a job to execute at a later time and then decide to start the job immediately, the started job cancels the scheduled job.

Downloading Export Jobs

After you run an export job, you must download the export job data to your local workstation for importing.

Data Manager saves export jobs in zipped XML file format. This file format is compatible with Microsoft SQL Server and Oracle databases. You can open and edit the XML file. However, make sure not to disrupt the file structure.

Note:

To ensure the performance and success of the export jobs and import jobs, do not exceed 170 megabytes for the export file size. If the export file size exceeds 170 megabytes, create several smaller export jobs that address different subsets of the entire desired export.

To download an export job

1. Open the **Data Manager** panel. For instructions, see Navigating the Data Manager Panel.

2. Expand the Export Job panel.

   Civic Platform displays a list of existing export jobs.

3. Find the desired export job in the list.

4. Click the **Actions** Menu button. For more information on the available commands, see Working with the Export Jobs Actions Menu.

   Civic Platform displays the Export Job Actions Menu Commands.
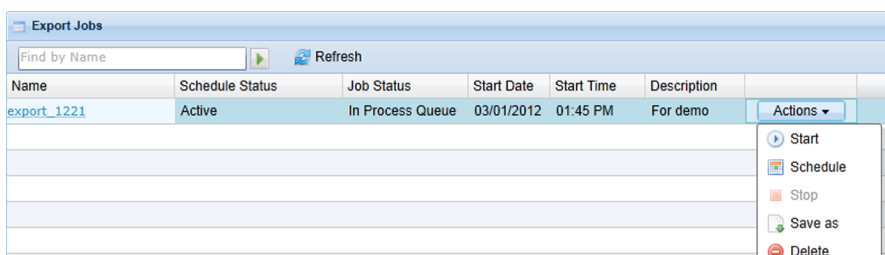
5. Click the **Save As** button.

   Civic Platform displays a Windows Explorer Save As dialog box.

6. Identify the file system location where you want to save the export job data packet.

7. Click the **Save** button.

   Civic Platform saves the export job data packet to the specified file system location.

Managing Import Jobs

This section describes how to configure an import job and import exported data, and gives you instructions on how to handle conflicts in the configuration data between the source agency and target agency.

You can schedule an import job to run at a specific date and time. You can also manually run the job.

Topics:

- Prerequisites to Import Jobs

- Planning Import Jobs

- Creating an Import Job

- Security Setting and Module Mapping

- Selecting Data Elements for Import Job

- Scheduling an Import Job

- Working with the Import Job Actions Menu

Prerequisites to Import Jobs

Before you create import jobs, make sure you complete the following tasks:

- Configure, run, and download an export job from the source agency.

- Set up the target agency, and import the product license for the target agency.

- For module-specific data elements (record types and permission settings, for example), prepare target modules to which you can map the data elements. Include module-specific user groups.

- Set appropriate Function Identifications (FIDs) to the target module user groups.

Planning Import Jobs

You may need to import the data elements in multiple phases. The following guidelines apply to a multi-phase import:

- If an export job file contains user group configuration information, create an import job that only imports the user group information, and run the import job before importing other types of data elements.

- Import the data elements of basic configuration (such as User, Standard Choices) before the others (such as Console Configuration, Form Portlet Designer).

- Import the record types before the data elements (such as Time Accounting, Work Order Template, Condition) that reference the record types.

- Import the record types, public users, and reference license professionals, before the ACA configuration data.

- Import the application specific info (ASI) groups, ASI tables, condition types, asset types, workflow, and record types before the expressions in the Expression Builder page.

- When importing document groups, also import the application specific info groups the document groups use as templates.

- Always export data elements and import data elements across the same types of databases. For example, avoid exporting and importing between Oracle and Microsoft SQL databases, or between I18N database and non-I18N database.

Creating an Import Job

Create an import job for importing the data elements from the source agency to the target agency.

To create an import job

1. Open the **Data Manager** panel. For instructions, see Navigating the Data Manager Panel.

2. Click the **New Import Job** button in the Export Jobs panel.

    Civic Platform displays the Create New Export Jobs page.

New Import Job			☒
Name*:	Enter a Name		
Source:	Choose a Source File	Browse	
Target Agency*:	NEW	▼	
Description:	Enter a Description		
Conflict Action*:	○ Override ⦿ Reject		
E-mail:	Enter an E-mail		
	Save Cancel		

3. Complete the fields that display.

Conflict Action	Choose from two options, **Override** and **Reject**. These options refer to conflict data between the target agency and source agency. If you want the data elements in the import file to overwrite existing duplicate data at the target agency, select the Override option. If you do not want the data elements in the import file to overwrite existing duplicate data at the target agency, select the Reject option.

    > 📝 **Note:**
    >
    > The value you select for this field determines the default conflict action for all the conflict data elements. You can open the import job configuration page and select different conflict action for specific data elements.

Description	A description of the import file.
E-mail	Your email address.
Name	A name that identifies the import job.
Source	Click the **Browse** button that appears next to this field to select the export job source file.
Target Agency	Choose the import file target agency from the drop-down list. If you use multiple agency administration, child agencies configured in the Delegate User Administrator display in this drop-down list are the . The default value for this drop-down list is the current user's agency.

4. Click the **Save** button.

    Civic Platform displays the Import Job Summary page. See Figure 4: Import Job Summary Page .

Figure 4: Import Job Summary Page

Security Setting and Module Mapping

Your configuration can associate security and permission settings with data elements at the module level or user group level. The import job summary page displays the security and permission setting and their module mapping (Figure 5: Security Setting and Module Mapping Section). You can choose whether to import security and permission from the source agency, and specify how to map the modules and user groups in the source file to the modules and user groups in the target agency.

Figure 5: Security Setting and Module Mapping Section

The security and permission settings refer to the permissions configured in certain data elements, for example, the record type security and permissions in condition type. Note the following points with the **Import Security and Permission** option:

- The **Import Security and Permission** option does not display if your import job does not contain data elements with module access permissions or user group access permissions.

- If you select the **Import Security and Permission**, you can migrate security and permissions at the agency, module, and user group levels.

- If you clear **Import Security and Permission**, Data Manager does not migrate security and permissions.

The **Module Mapping** section displays source modules associated with data elements in the import job. You specify the module in your target agency into which you want to the import data elements from the module in the source agency of the import job. Note the following points with the **Module Mapping** section:

- The Module Mapping section does not display if your import job does not contain data elements at the module level.

- When you clear the **Import Security and Permission** option, the list of source modules may change, or not display.

- Make sure to specify a target module for every source module. Otherwise, the import job ignores the data elements that relate with the source module.

- You cannot map a target module to multiple sources.

- Every time you change a module mapping, remember to reconfigure the user group mappings in the module mapping if there is any. User group mapping only applies to the import of security and permission.

- You can import a disabled module or disabled user group to a disabled or enabled target module or user group.

To configure the module mapping and user group mapping for an import job

1. Go to the Import Job Summary page. For instructions, see Creating an Import Job.

   Civic Platform shows the Module Mapping section in the Import Job Summary page.

2. Select a target module from the Target drop-down list for a source module.

   If a module in the target agency has the same name as the source module, the module is mapped to the source module by default. You can change the module if necessary.

   All the modules in the target agency are the options in the drop-down list.

3. Click the down arrow in the last column of the module mapping section to configure user group mapping.

   > **Note:**
   >
   > Data Manager disables the down arrow if a source module contains no user groups.

   The User Group Mapping section displays with the list of user groups in the source module.

4. Select a user group from the drop-down list beside the source user group to set the mapping.

   You can click the arrow button beside the User Group Mapping label to automatically populate the target user group field with the source user group name, on the precondition that the same user group exists in the target module.

5. Repeat steps 2-4 until you finish the mapping for all the modules, and (optionally) user groups.

6. Click the **Save** button in the navigation panel to save the settings.

Selecting Data Elements for Import Job

The major task to do when configuring an import job is to select the data elements from the export job that you want to migrate to the target agency.

The target agency may already contain the data elements that you plan to import. For such duplicate data elements, you must determine how to resolve any conflicts. In addition to the default conflict action configured in the import job summary page, you can set the conflict action for individual data element, or associated element, after checking the conflict details.

Topics:

- Selecting Data Elements for Importing

- Resolving Data Element Conflicts

Selecting Data Elements for Importing

To select data elements for an import job

1. Go to the Import Job Summary page. For more information, see Creating an Import Job.

Civic Platform displays the importable data element types in the left navigation panel.

For details on the configuration data that you can export and import with each data element type, see Exportable and Importable Data Element Information.

2. Click the type of data elements you want to include in the import job in the left navigation panel. For example, **Record Types**.

If you click the **AA Configuration**, **Reference Data**, or **AAM Configuration** link in the navigation panel, their sub types display under the link. You can then click a sub type and you can load the data elements in it.

> **Note:**
>
> If the selected type contains many data elements, Data Manager can take some time to load all the data.

Civic Platform loads the list of data elements from the specified export job source file.

3. Do one of the following to filter long data elements list:

   - Enter text in the **Find by** field to display only the items that contain the text.

   - Select the check box beside the **All Selected** option to display only the items that you have selected in the list.

   - For the Record Types data element page only, click the **Set Filters** button, and set filter criteria in the popup Record Type Filter page to filter the record types that display.

     > 📋 **Note:**
     >
     > By default, Data Manager sorts record types alphanumerically. Typically, agencies do not customize the sort order. However, if an agency needs to customize the sort order for the Record Type Select (picker) page and they use the server constant CUSTOMIZED_APPTYPE_DISPLAYORDER, then if an agency imports record types that have a customized sort order, the sort order might conflict with the sort order at the target agency. To fix this issue, agencies can choose from two options noted below. Update the column value for TYPE_DISPORDER in the R3APPTYP or set the server constant CUSTOMIZED_APPTYPE_DISPLAYORDER to N.

   - Click the column headings to activate the column filters. Use column filters to sort columns alphabetically, show and hide specific columns, and group the display based on column names.

4. Select or clear the elements you want to import while determining how to resolve the conflict data.

   - You can select an data element entry but clear the associated elements in it to exclude the import of the associated elements.

   - You can either click the check boxes individually to select/clear the data element one by one, or click the column name to select/clear all (except any disabled items) at one time.

     > 📋 **Note:**
     >
     > If your extract relates some data elements with modules and/or user groups, but you do not configure the relevant module mapping (Security Setting and Module Mapping), you cannot import the data elements even though you can select the data elements.

   - For information on how to resolve data element conflicts, see Resolving Data Element Conflicts.

5. Click the **Save** button in the navigation panel to save your selection in the current data element type.

6. Repeat the previous steps for all the data element types you want to add to the export job.

Resolving Data Element Conflicts

Each element entry and its associated element (for example, record type and its associated fee schedule) from the export job source file display in the list with check boxes.
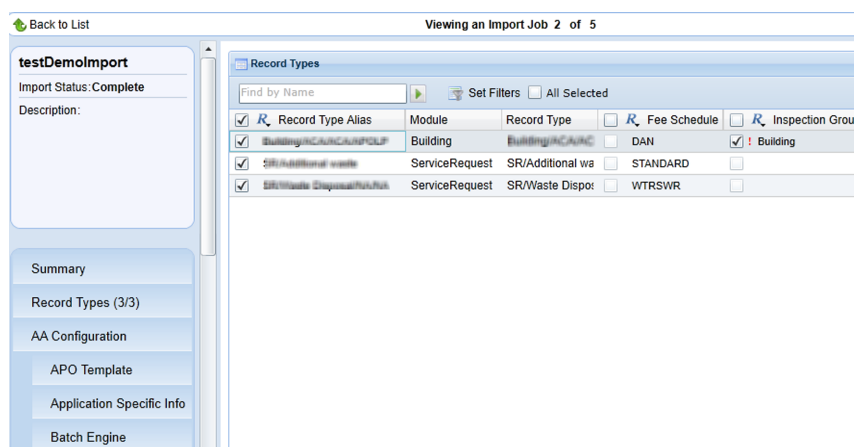
Some element entries from the extract may already exist in the target agency. Data Manager compares these element entries and their values in the source agency and target agency, and provides indications of conflict status upon loading of the elements. You can resolve the data element conflicts with the help of the indications:

- If an element entry or the associated element already exists in the target agency with the same value as in the source agency, Data Manager disables its check box, which means it is unnecessary to import it. Otherwise, Data Manager selects the check boxes by default.

📝 **Note:**

There is an exception: The element entries in the My Navigation page are always selectable for importing even though they already exists in the target agency with the same values as in the source agency.

- When the data elements first load, each column heading displays the default conflict action selected in the import summary page. "O" stands for override to override the value in the target agency with the one from the source agency. "R" stands for reject to reject the value from the source agency.

  - If you select "R" for the first column, which is usually the data element name, Data Manager rejects the data elements and their associated elements in the target agency, regardless of whether you select "O" or "R" for the subsequent columns that represent the associated elements.

  - If you select "O" for the first column, the data elements in the source agency override the corresponding data element values in the target agency. At the same time, you can select "R" for the subsequent columns that represent the associated elements, so that the associated elements can still reject the values from the source agency.

- A red "!" sign displays beside a data element (or associated element) indicating the conflict status that the data element (or associated element) in the export job source file conflicts with the existing ones in the target agency. You can click the red "!" sign and view the conflict details in the popup Conflict Detail window (see Figure 6: Conflict Detail Window) before deciding whether to override or reject the conflict.

  - If you import an inspection group or workflow, associated with a record type in the record type page, Data Manager disables the inspection group or workflow in the inspection type or workflow page, and displays with a red "!" sign to indicate that you selected the data element elsewhere.

  - If you import an attribute template, associated with an asset type in the asset types page, Data Manager disables the attribute template in the attribute templates page, and displays with a red "!" sign to indicate that selected the data element elsewhere.
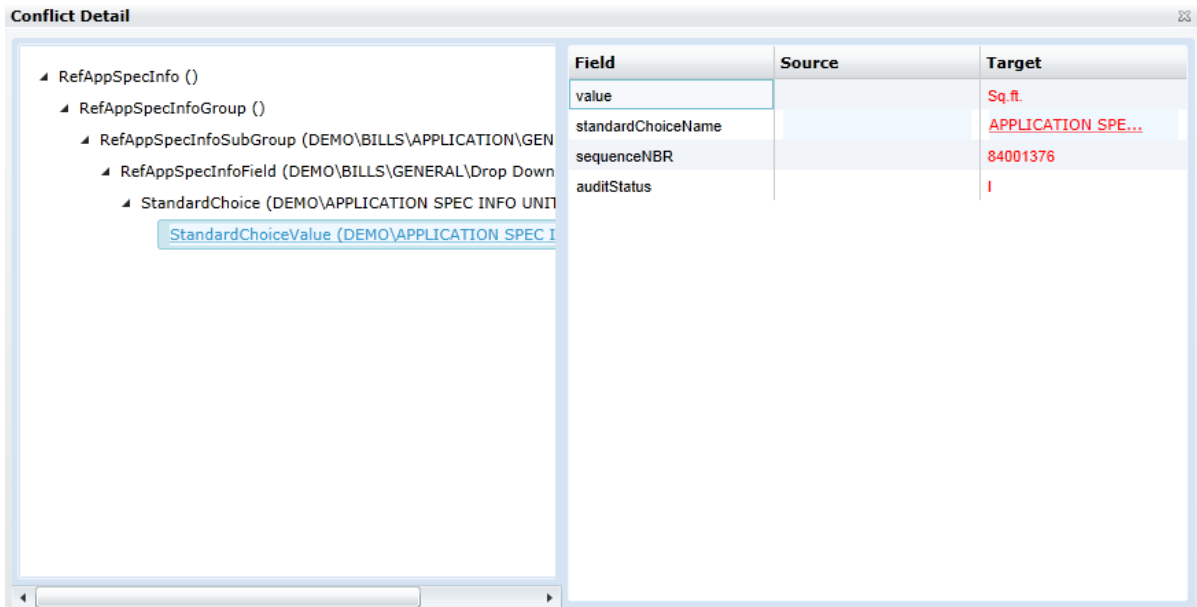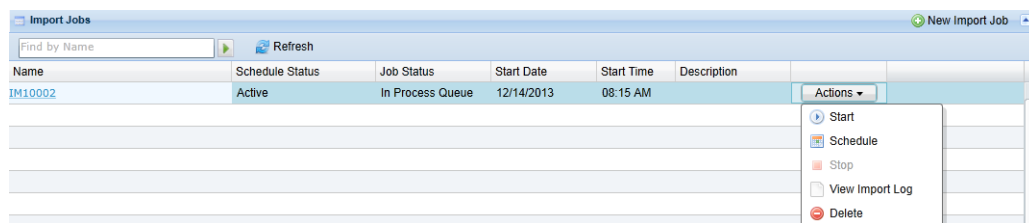
Figure 6: Conflict Detail Window

A **Conflict Tree.** A tree that directs you to the source of conflict in the database. The node names are the primary key + value of the database tables from the ancestor to the actual one that contains the conflict field.

B **Conflict Field.** View the database field that contains different values in the target agency and source agency.

C **Source.** The value of the conflict item in the source agency. The value can be empty if undefined. The value shown in red is the one causing the conflict.

D **Target.** The value of the conflict item in the target agency. The value can be empty if undefined.The value shown in red is the one causing the conflict.

Scheduling an Import Job

You can schedule an import job before, during or after you configure the export job. The schedule sets the date and time to run the import job. If necessary, you can hold the schedule to prevent the import job from running.

To schedule an import job

1. There are two ways to schedule an import job.

- Open the Data Manager panel, and select Schedule from the Actions list for the desired import job.

- Go to the Import Job Summary page which contains the schedule section. For instructions, see Creating an Import Job.

Civic Platform shows the schedule section.

2. Complete the fields in the schedule section.

Date	Enter the date or use the calendar icon to select the date to automatically run the import job. The default date that displays is the current date.This field only works when the **Scheduled Status** is Active.
Time	Select the time when you want to run the import job. The default time that displays is the current time.This field only works when the **Scheduled Status** is Active.
Schedule Status	Select the status as On Hold or Active. If the status is On Hold, you can only save the import job, but cannot run it either on the scheduled time or manually. If the status is Active, the import job runs on the scheduled time. You can also run the job manually.

3. Click the **Save** button in the navigation panel to save the schedule settings.

Working with the Import Job Actions Menu

Use the import jobs Actions menu (see Figure 1: Data Manager Panel) to manage and run import jobs. You can use the Actions menu to start and stop an import job, schedule an import job, view a log of all the changes made to an import job, and delete an import job.

The status fields at each import job, including Schedule Status, Job Status, Start Date and End Time, show the job statuses from your previous actions.

- You can set the schedule status of an import job to be either Active or On Hold.

  If the schedule status is Active, the job can run on the scheduled date and time. If the schedule status is On Hold, the job cannot automatically run.

- The following job statuses are possible for an import job.

  - Completed. The job completed successfully as configured.

  - In Process Queue. You scheduled the job to execute at a later time.

  - Terminated. The job terminated without completing.

  - Running. The job is currently running.

  - Stopping. The job stopped and you can resume the job if you click Start.

- The start date and time are the schedule that you created for the job.

The commands available in the Actions menu for a job vary depending on the current statuses of the job.Table 8: Import Jobs Actions Menu Commands describes the Actions menu commands of import jobs and explains how the schedule status and job status of each export job affect the availability of menu commands.

📝 **Note:**

After running an import job, in particular, after importing Standard Choices, ACA Configuration, and/or text settings, clear the cache for Civic Platform or even restart the Civic Platform server, to make sure the newly-imported data elements appear.

> 📝 **Note:**
> After running an import job, open the target agency and check that Data Manager imported the data elements successfully. Data Manager may fail to export and import some default settings in ACA configuration.

Table 8: Import Jobs Actions Menu Commands

Command	Schedule Status	Job Status	Command Effect
Delete	Active	Complete In Process Queue Terminated	The Delete button is active and you can delete the import job from the database.
Delete	Active	Running Stopping	The Delete button is inactive.
Delete	On Hold	Any	The Delete button is active and you can delete the import job from the database.
Schedule	Active	Complete Terminated	The Schedule button is active and you can schedule the date and time when you want the import job to run.
Schedule	Active	In Process Queue Running Stopping	The Schedule button is inactive.
Schedule	On Hold	Any	The Schedule button is active and you can schedule the date and time when you want the import job to run.
Start	Active	Complete Terminated In Process Queue	The Start button is active and you can manually run the import job (see Note below).
Start	Active	Running Stopping	The Start button is inactive.
Start	On Hold	Any	The Start button is active and you can manually run the import job (see Note below).
Stop	Active	Complete In Process Queue StoppingTerminated	The Stop button is inactive.
Stop	Active	Running	The Stop button is active. If you click the Stop button while the job is running, the job terminate and the job status is updates to Terminated.
Stop	On Hold	Any	The Stop button is inactive.
View Import Log	Active	CompleteIn Process Queue	The View Import Log button is active and you can view a log of all the changes made to an import job.
View Import Log	Active	Running Stopping Terminated	The View Import Log button is inactive.

Command	Schedule Status	Job Status	Command Effect
View Import Log	On Hold	Complete Terminated	The View Import Log button is active and you can view a log of all the changes made to an import job.
View Import Log	On Hold	In Process Queue Running Stopping	The View Import Log button is inactive.

Note:

Data Manager allows you to manually start a job even if the job schedule is undefined or the schedule status is On Hold. If you schedule a job to execute at a later time and then select the Start command to start it immediately, Data Manager cancels the scheduled job.