Copying a TRIM Context Production dataset for Training or other purposes
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Background

HP Software receives regular requests from customers for advice on creating copies of their Production dataset for such purposes as Training, Testing, Development and User Acceptance Testing (UAT). Such advice is not included with the standard set of documentation provided with TRIM Context, nor is it the responsibility of HP’s Help Desk to provide such support for non-Production environments. This technical note aims to bridge the gap by providing high-level advice, and highlighting some common traps to avoid.

Note: This is not a detailed instruction manual. It is assumed for the purpose of this document that the audience is already competent at installing, configuring, deploying and administering TRIM Context client, server and database components within their network infrastructure. For brevity’s sake, unless specified otherwise, this document refers to creating a Training environment, but could equally apply to other environments such as those listed above.

Discussion

Note: HP Software recommends NOT using your Production TRIM application server, database server or client PC’s to host a Training environment; as it introduces the risk of inadvertently compromising performance and stability of your Production environment. Part of any TRIM Context deployment should include the establishment of parallel, but discrete, environments. Virtual machines can prove very useful for this purpose.

Discussed below are considerations for each of the TRIM Context components involved when copying your Production database for use in Training:

Database;
Document Stores & Document Queues;
Document Content Index (DCI);
TRIM Application Server(s); and
TRIM Clients.
Database

Note: Although it’s technically feasible for databases belonging to different TRIM environments to be hosted on the Production database server, HP Software discourages this practice for the reasons given above.

You should ask your DBA to make a copy of the Production database, stage it on a non-Production database server, and make it available using an appropriate name. (A common trap for an inexperienced DBA, and which should be avoided, is using the backup and restore facilities of the RDBMS but not changing the location of the data files and log files when restoring; hence overwriting the Production database).

This new copy of the database can then be registered as a dataset in TRIM Enterprise Manager (TEM) (Version 5.x to 6.1.x) or TRIM Enterprise Studio (TES) (Version 6.2.x onwards) on your TRIM Training server.

Unique Database ID

You should always use a different 2-character database ID (DBID) to that of Production (or any other TRIM database in your organisation) when registering it on your Training server. This DBID is used for a number of purposes such as document store subdirectories, barcode labels, log files, TRIM references, user configuration settings, etc.

E.g. imagine a scenario where a user is accessing both Production and Training at various times from their own PC: if both databases have the same DBID, when the user changes options such as screen layout, colours, etc in Training it would also affect Production because these settings are saved against the same DBID.

Testing, Development and UAT Databases

Databases for such purposes should be staged on a non-Production database server. If you have no other choice but to put them on your production database server, you’ll need to consider your approach to testing new releases of TRIM Context. With any new release requiring a database schema upgrade, this can be done for each database as required without affecting the others. However, in the scenario where the new release of TRIM requires a different RDBMS version (e.g. TRIM Context V5.x can use Oracle 8i, but Context V6.x needs 9i or higher) you’ll most likely want a separate database server running the different RDBMS version for the development/testing environments. This
equally applies to service pack upgrades for the RDBMS, where you ideally want to test the effect of installing a service pack on a separate database server to that of Production.

Event Processor

E-mail Notifications

When copying an entire Production database for Training, you’ll be copying tables containing real e-mail addresses. When configuring the Event Processor in your Training environment, you’ll most likely want to turn off E-mail notifications and Alerts; otherwise exercises conducted in training could send very annoying and probably confusing e-mails to people (e.g. a workflow action that’s become overdue in Training, which the user has previously completed in Production – the e-mails will look the same unless you customise the e-mail templates in Training to make them look different).

Another way of ensuring such e-mails are not sent is to intentionally NOT configure the e-mail notification settings in TEM/TES for the Training event processor. This way no e-mails will be sent at all for Training events.

Avoid Reprocessing Events

Because you have copied the TSEVENTPRO table, it will still contain references to the Production server name (used for keeping track of which events in TSEVENTDAT were last processed by which server). If you do nothing, and start the Event Processor in Training, it will start reprocessing all events from the start of the table. This could potentially be a very large number of events being processed unnecessarily. Ideally you should change the Production server name in the TSEVENTPRO table to that of the new Training server before starting the event processor.

Creating Training Users

It is common practice to create dedicated Training accounts for users in a Training database, to ensure consistency of user access and functionality for trainees. Due consideration should be given to the appropriate user category, security profile and group memberships granted to these user accounts to ensure that all required training tasks are able to be performed, and more importantly, that training users aren’t inadvertently given access to confidential information – remember this is a copy of your Production data.
**Document Stores & Queues**

*Document Store(s)*

The document store for your Training dataset can be copied to anywhere that can be mapped with a UNC path and has available disk space. Consideration should be given to network topology and the location of users performing the training, to minimise the effect on performance of the Production system.

Once you’ve copied the document store, you’ll need to amend the store root directory name in the copy to reflect the new 2-character DBID used for the Training database in TEM/TES; otherwise users will not be able to access electronic documents from that store during Training.

It is crucial to ensure that any references to document store paths in the Training database are amended to reflect the location of the Training copy of the stores; not the Production stores. This includes both the default path registered for the database in TEM/TES, and any explicitly defined paths for document stores in Tools – Context Administration – Document Stores within the TRIM Context application.

*Document Queues*

If there is a possibility that users will be processing document queues in Training, document queues can be copied to anywhere that can be mapped with a UNC path and has available disk space. Consideration should be given to network topology and the location of users performing the training, to minimise the effect on performance of the Production system.

It is important to ensure that any references in the Training database to document queue paths are corrected to reflect the location of the Training copy of the queues; not the Production queues. This can be done via Tools – Record – Document Queues within the TRIM Context application.

*Document Content Index (DCI)*

The Document Content Index for your Training dataset can be copied to anywhere that can be mapped with a UNC path and has available disk space. Consideration should be given to network topology and the location of users performing the Training, to minimise the effect on performance of the Production system.
Care should be taken to ensure that once the DCI is registered in TEM/TES, the copied configuration file (TRIMFtr.cfg) for the index is amended to reflect the path(s) to the Training index(es) rather than the original Production index(es).

**TRIM Application Server(s)**

Although it is possible to have one TRIM middle-tier server providing access to Production as well as other datasets such as Training, Testing and Development, it’s not the most practical. Part of any organisation’s testing of new releases should include upgrading the TRIM middle tier on a test server to the latest release and testing it with the upgraded database schema and new version of the client. If only one server is being used, you would be upgrading the Production server to the new version, which defeats the purpose of having a testing environment.

**TRIM Client**

**Accessing Different Databases**

If using the same PC to access more than one TRIM database, it is a good idea to encourage users to change the look and feel of the TRIM Context client for each database they access, to help avoid accidentally applying changes or creating new records in the wrong database. This is especially relevant where the databases are essentially copies of each other and the data looks exactly the same in each. Colour schemes work well for this purpose, and can easily be pushed out to many users with a registry key if desired.

**Testing New TRIM Versions**

It’s possible to install both TRIM Captura and TRIM Context on the same PC, which may be useful for users who are performing testing of Context functionality on their own machines while still using Captura in Production. The limitation with such a setup is in the integration with desktop applications like Office Suites or E-mail. Only one TRIM installation can be integrated with such applications at any one time.

HP is often asked whether two different versions of TRIM Context can be installed on the one PC. Although it is “theoretically” possible, TRIM is not designed this way and such an installation would not be recommended, nor supported by HP. Many files and settings are written to the registry and user profile, hence conflicts and unpredictability would certainly occur. Separate non-production machines should be used for testing new TRIM versions wherever possible.