**FINEOS** Corporate University

# COURSE OUTLINE – (FTB-F-009)

# COPY LIVE

## About this course

The purpose of the FINEOS Copy Live course is to enable attendees to migrate FINEOS system configuration data from a source environment to a destination environment. This two day instructor-led course will describe the type of data that you can migrate and explains how to use FINEOS Copy Live to migrate this data.

## Course objectives

After completing this course, trainees will gain the skills to:

- Migrate system configuration data using the FINEOS Copy Live UI
- Migrate system configuration data using the FINEOS Copy Live command line tool
- Change the default import and export directories
- Run data integrity checks
- Understand the log files
- Select items to export using the XML selector
- Work with process type versions
- Migrate rules modules

## Who should attend?

Anyone involved in the system configuration of the FINEOS application:

- Business
- Technical

## Pre-requisites

Participants of this course must have previously completed the following FINEOS training modules:

**FTB-F-006, FTB-F-007**

## Course content

| Module | Description |
|---|---|
| **FINEOS system configuration data handled by Copy Live** | This module enables candidates to migrate system configuration data including task types, case types, process types, rules, document types, party role types and workflow calendars. You can also migrate company structures and enums. |

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| Prerequisites to using Copy Live | This module covers the prerequisites prior to logging into Copy Live. It analyses the dependencies of Copy Live enabling candidates to assess migration results and the desired outcome. |
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| How Copy Live works | This module walks through the recommended uses of Copy Live. |
| Migrating data using FINEOS Copy Live UI | Candidates are introduced to the Copy Live UI and its functionality. They are shown how to export the different types of system configuration data from a source environment to an XML configuration file. This is followed by importing the XML file to a destination environment. |
| Migrating data using FINEOS Copy command line tool | The Copy Live command line tool provides you with greater automation when moving data between environments. This enables candidates to increase efficiency and reduce user error. This module focuses on migration of both system configuration data and Application Configuration data. |
| Changing the default import and export directories | Configuration of Copy Live allows candidates to modify the default directory set up for export and import files. |
| Running data integrity checks | A data integrity check is a database operation that checks for corrupted enums, company structures and system configuration data. This module identifies how to handle potential configuration conflicts. |
| Understanding the log files | This module provides an overview of log file records including, all TA logging, start-up information, business object information, progress indication. |

## *Format & duration*

| Delivery | Tutor-Led Practical | Duration | 1.5 days |
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| **Description** | | | |
| The desired effect for participants on completion of this course is an acquisition of skills i.e. to **'KNOW'** how to use a particular area of the FINEOS product. Participants are led through practical exercises relevant to the particular skills area directed and assisted by the tutor. | | | |

## *For further information, contact FINEOS Corporate University:*

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