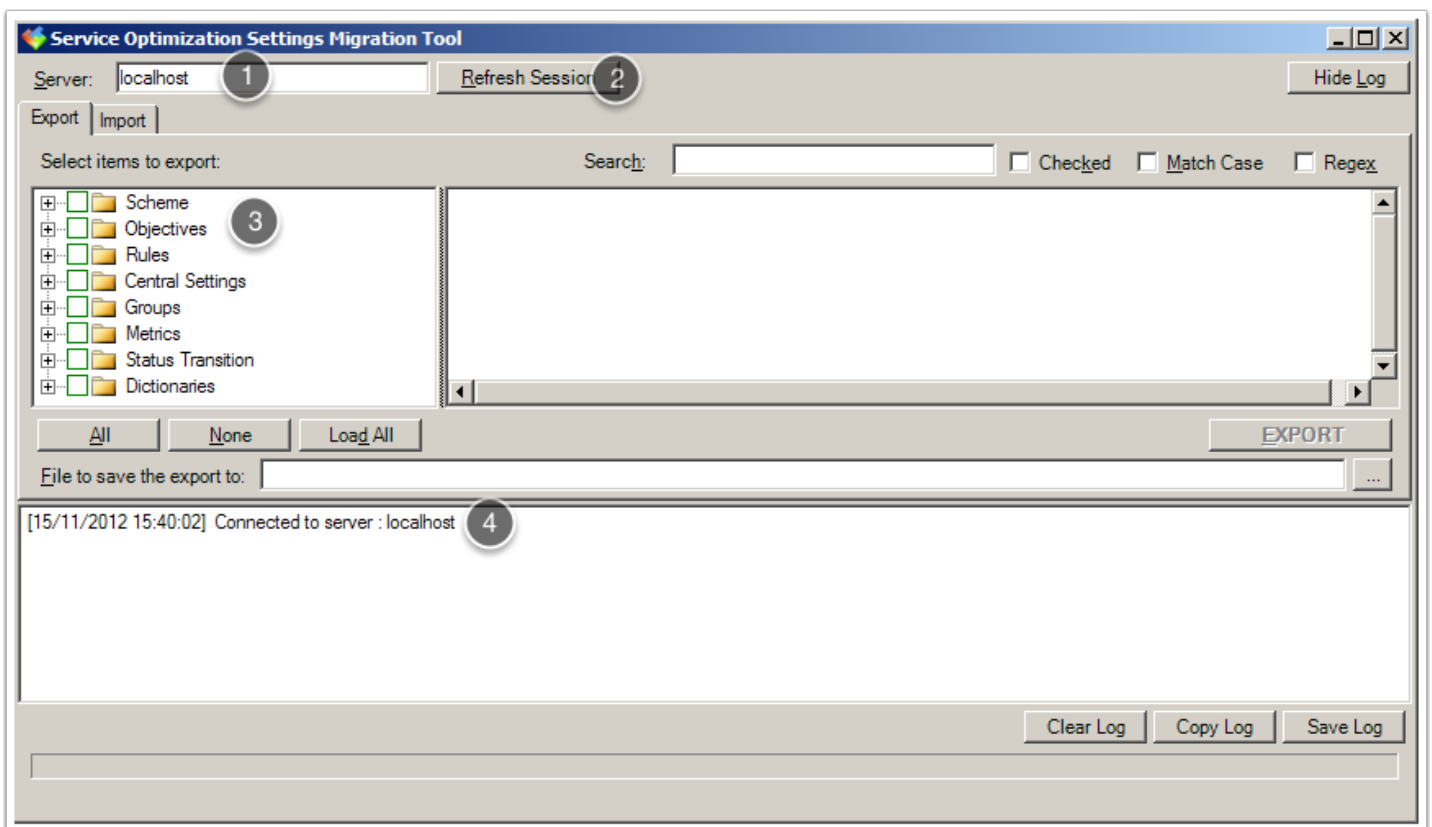


Export using Settings Migration Tool

Connect to a Xoom server

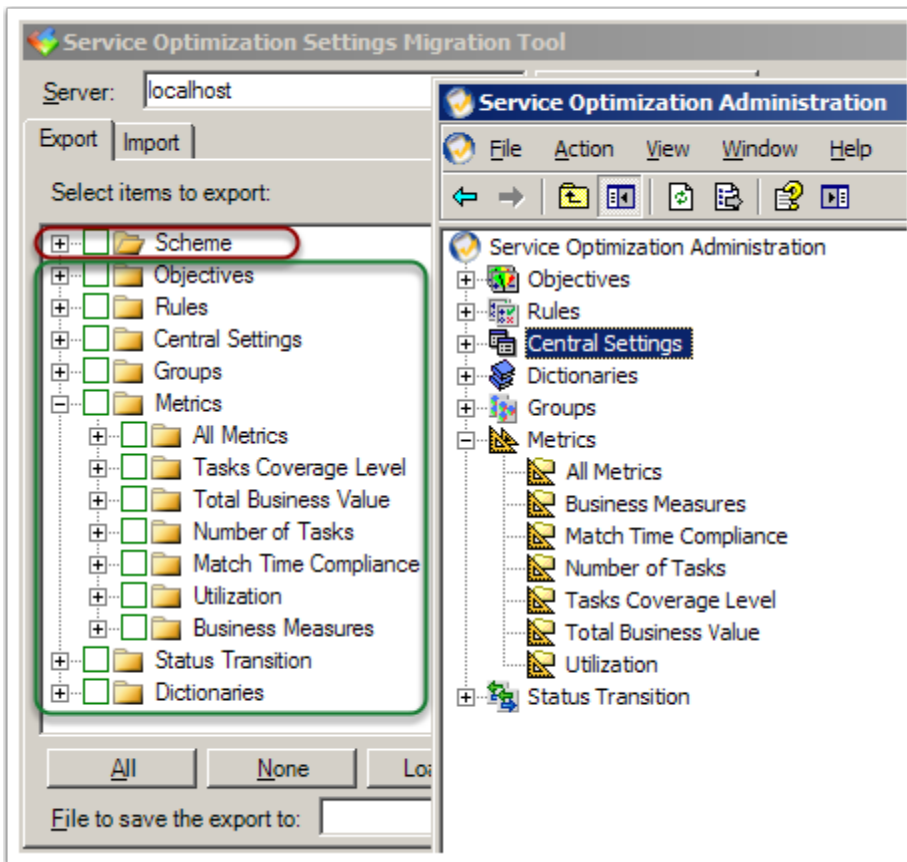
1. Enter the Xoom server name in the Server text box. In this example, we are connecting to the local server.
2. Click on Connect / Refresh Session button.
3. After the connection to the Xoom server has been successfully established, the configuration tree view is populated depending on the settings of the Xoom server to which you connected.
4. The log will also contain a message indicating when the connection was made and to which server.



Configuration tree

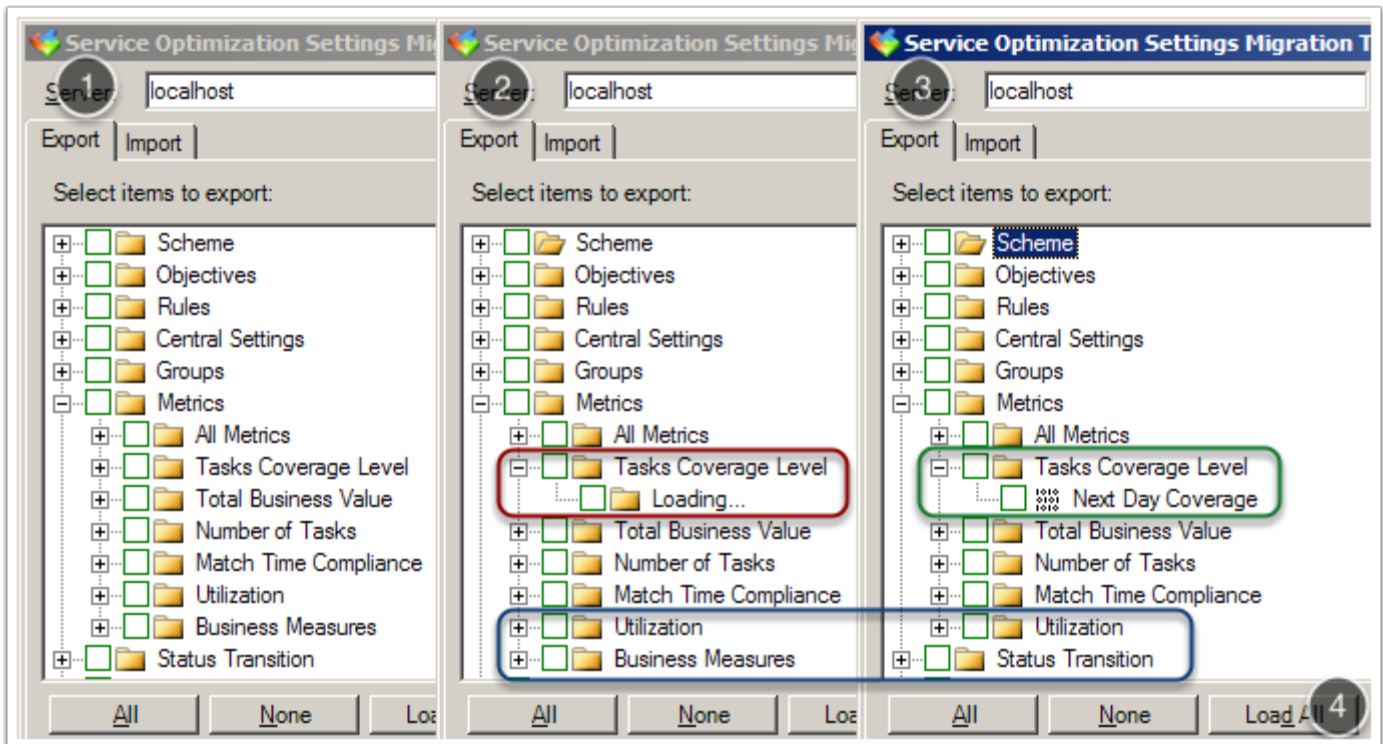
The structure of the configuration tree displayed in the tree view is as follows:

- There is Scheme on top (enveloped in red), which defines the structure of data objects that Service Optimization uses, including user defined properties, custom dictionaries and custom business objects. The Scheme is usually managed using the Service Optimization Structure tool.
- The rest of the tree (enveloped in green) includes all other settings. As you can see, barring some ordering differences this has the same structure as the tree in the Service Optimization Administration tool.



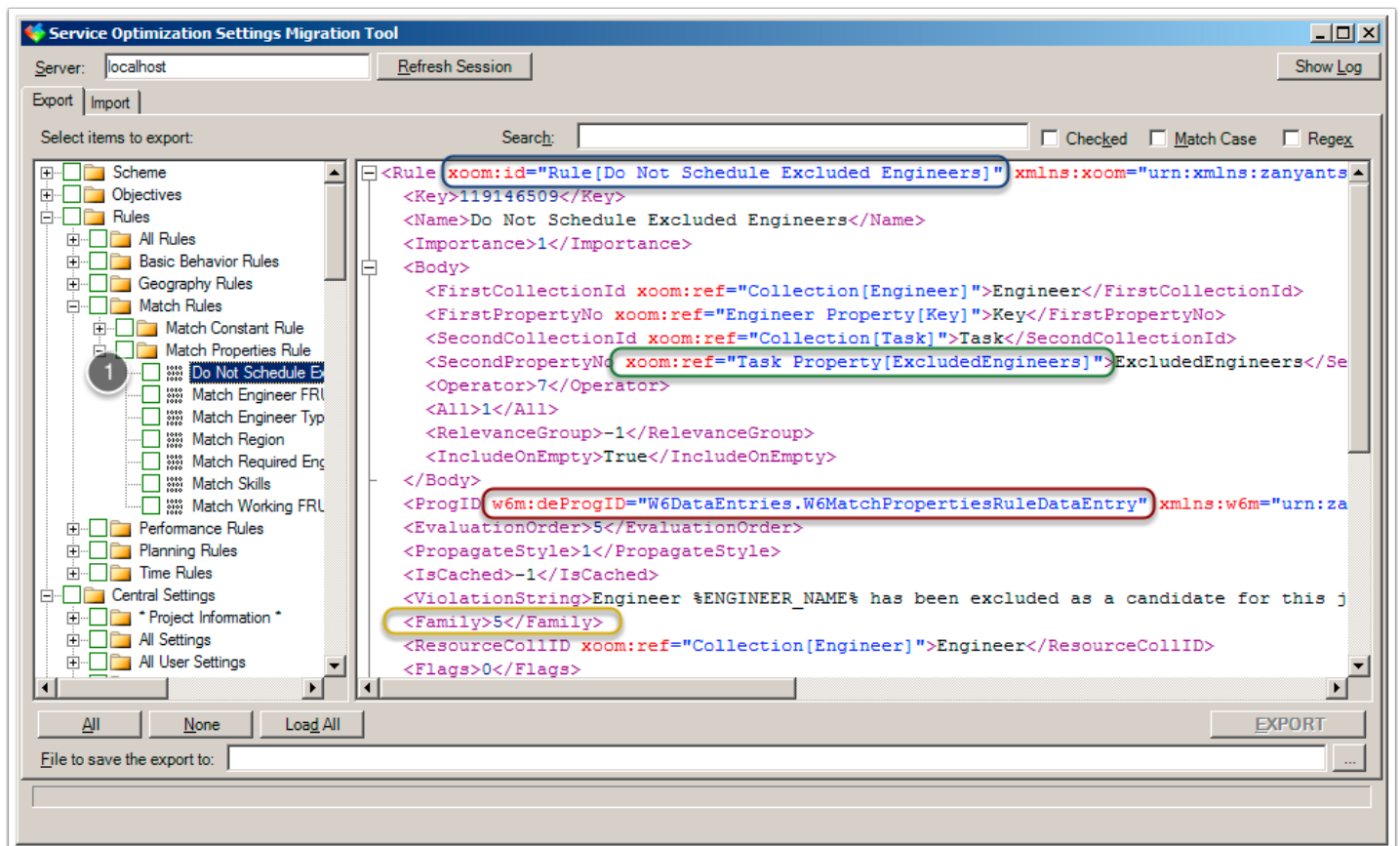
Loading items

- When you initially connect to the Xoom server, only the tree structure is loaded, as in window 1. The reason for that is that Xoom is trying to avoid putting undue burden on the Service Optimization server it manages by not loading parts of the configuration that won't actually be used.
- The items are normally loaded on demand. Whenever the tree node containing actual items (as opposed to other categories) is expanded, as marked in windows 2 in red, Xoom loads all items of that type from the Service Optimization server.
- Once the items have been loaded, they are inserted in the tree, as shown marked in green in window 3, in this case a single metric called "Next Day Coverage".
- When items of a certain type are loaded, the Settings Migration Tool also identifies the tree nodes that don't contain any items at all, and removes them from the hierarchy. For example, below we see that there was originally an additional metric type called "Business Measures" (see the part marked in blue in window 2), but that metric type disappeared from the tree after the loading because no metrics of that type are actually defined in the system (see the part marked in blue in window 3).
- Settings Migration Tool also gives one the option of fully populating the configuration tree by loading all items. This is done by clicking on the Load All button. Functionally, this is equivalent to exporting everything, but without saving the results to a file. Once all items have been loaded, any subsequent export using the same session will be much quicker.



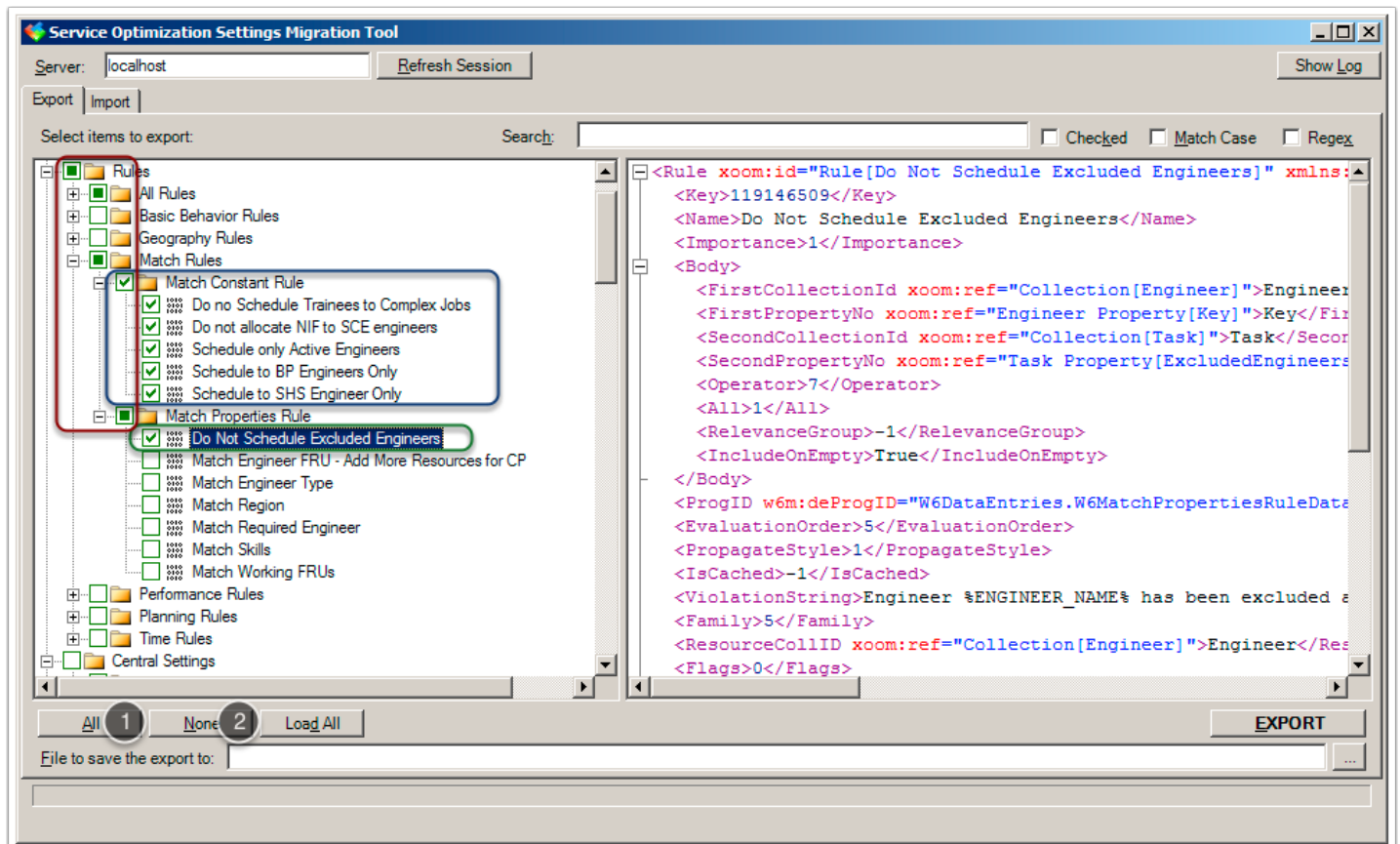
Exploring the configuration

- When the configuration items have been loaded, they can be explored using Xoom. To display their content, we simply select the item in the configuration tree (see 1).
- The Xoom representation of the item contains Xoom meta-data. This includes Xoom ID (in blue) which serves as an environment independent identifier of each item, reference information (in green) showing the item to which reference nodes are pointing, and other, less important types of meta-data (example in red is internal information required for the interpretation of binary information).
- Unlike the Service Optimization Administration tool, Settings Migration Tool displays the content of each item's configuration in its fullest, not just what is shown via the UI. For example, rule family (in beige) is important for logic tuning, yet is not displayed by the rule UI in the ClickSoftware's administrative tool.



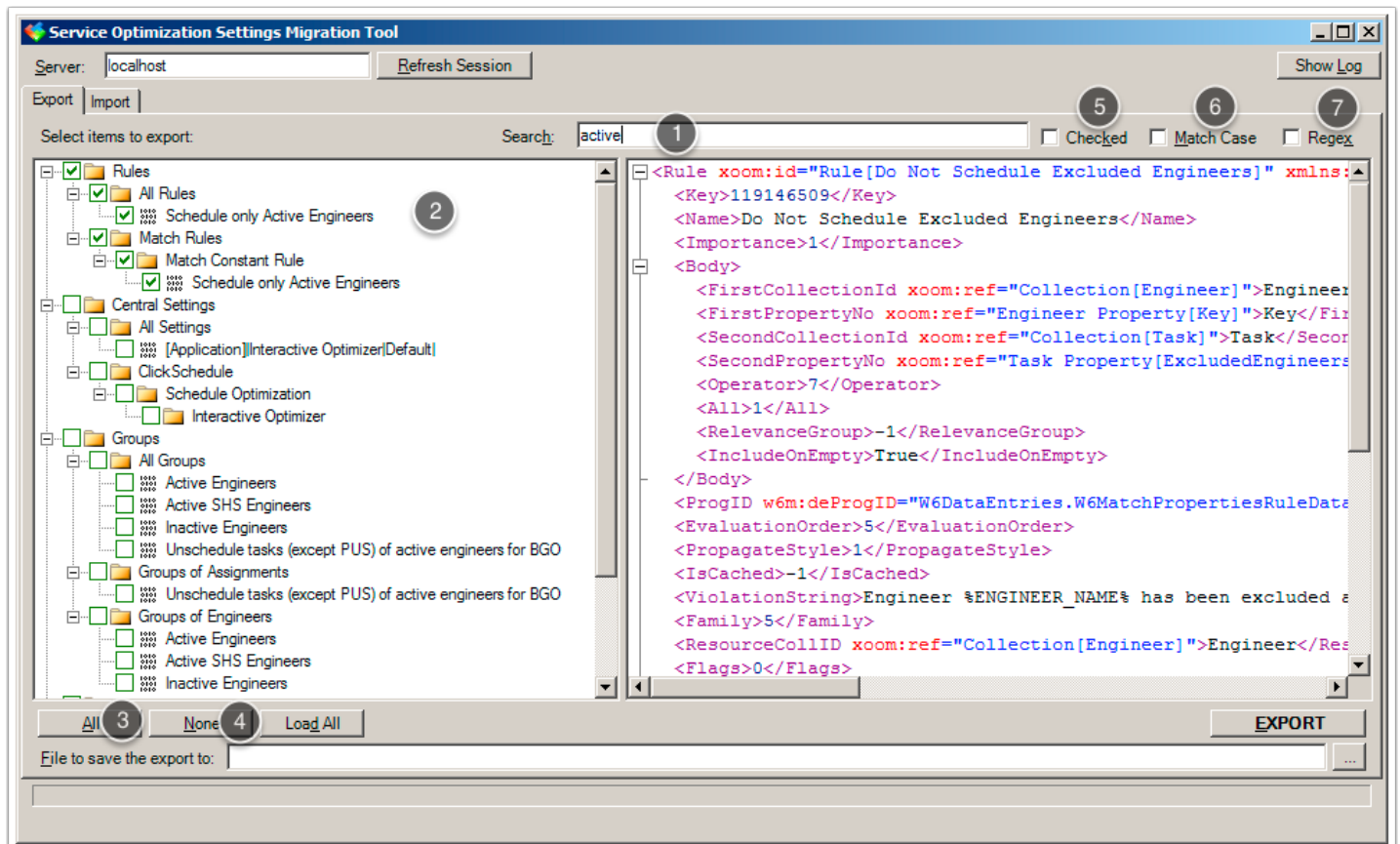
Selecting the items to export

- We select the items to export by checking the check box in front of their name (in green).
- Checking a category item checks all categories and individual items within (in blue). Unchecking the category item conversely unchecks all its contents.
- Category check boxes reflect how many items within are checked. If all items are checked, the category is checked as well. If some items are checked, the category contains a small square. If nothing is checked, the category is unchecked as well.
- The buttons at the bottom can be used to check (1) or uncheck (2) all items in the currently displayed configuration tree. (The configuration tree displayed changes based on filter/search, see below.)
- If the same item is located under two or more categories, its check box will be synchronised. For example, checking any rule will also result in All Rules category being partially checked, since each rule will be located not just under its own type, but also under All Rules.



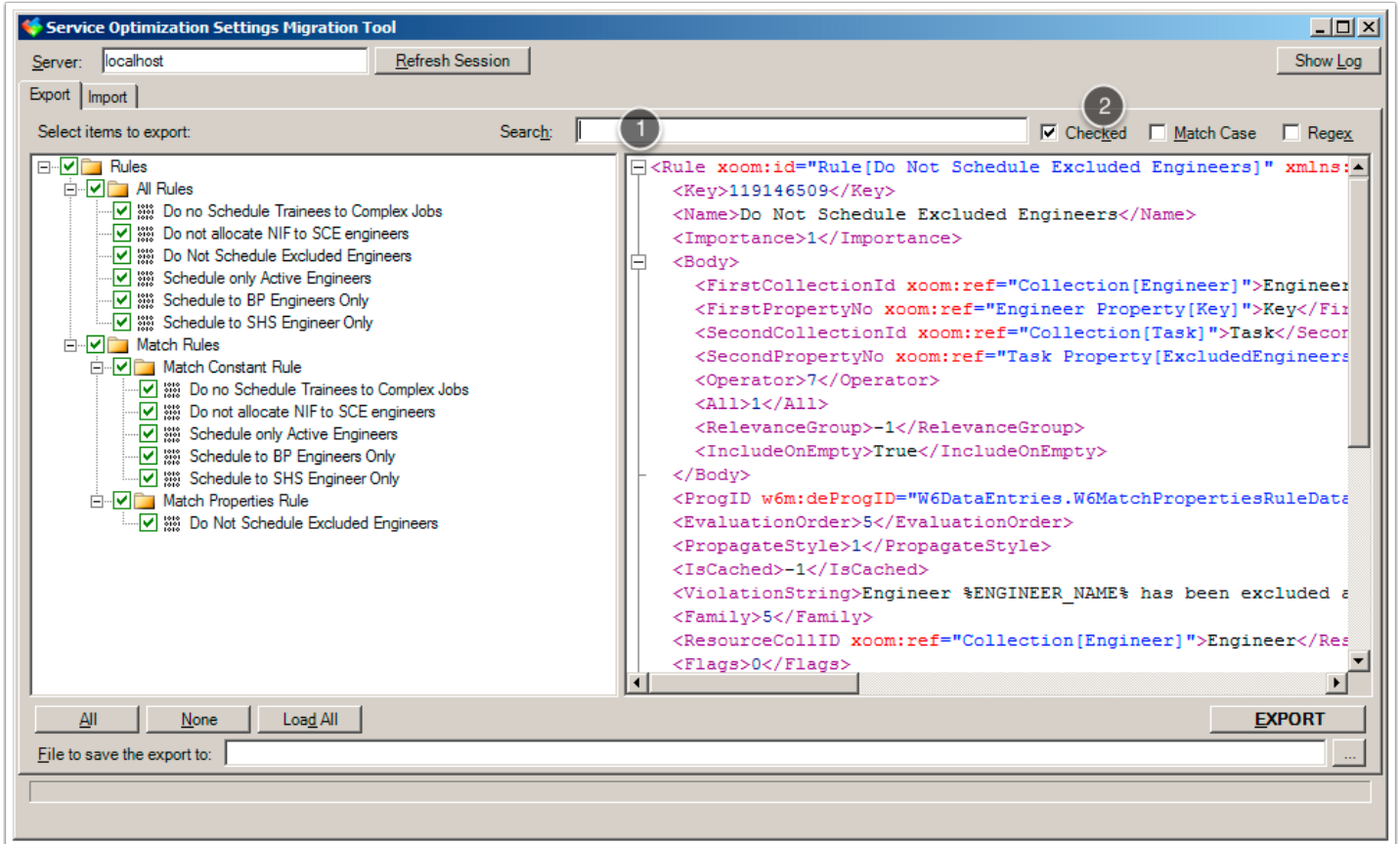
Searching / filtering the configuration

- Settings Migration Tool implements an interactive search / filter capability. By typing a search term in a search box (1), the configuration tree (2) is filtered in order to display only items (with the categories that contain them to ease the identification of the found items). The filtering is applied interactively, as we type.
- When filtering, the All (3) and None (4) buttons are used to check and uncheck the items in the filtered category tree, not items overall. This is useful as it allows us to quickly select the desired items using a set of well positioned search terms.
- If Checked check box (5) is checked, then search returns only checked items.
- If Match Case check box (6) is checked, then the search is case sensitive. For example, "Active" won't match search term "active" in this case.
- Check box Regex (7) is used for advanced searches using regular expressions, the explanation of which far exceeds the scope of this guide.



Verifying the selection prior to export

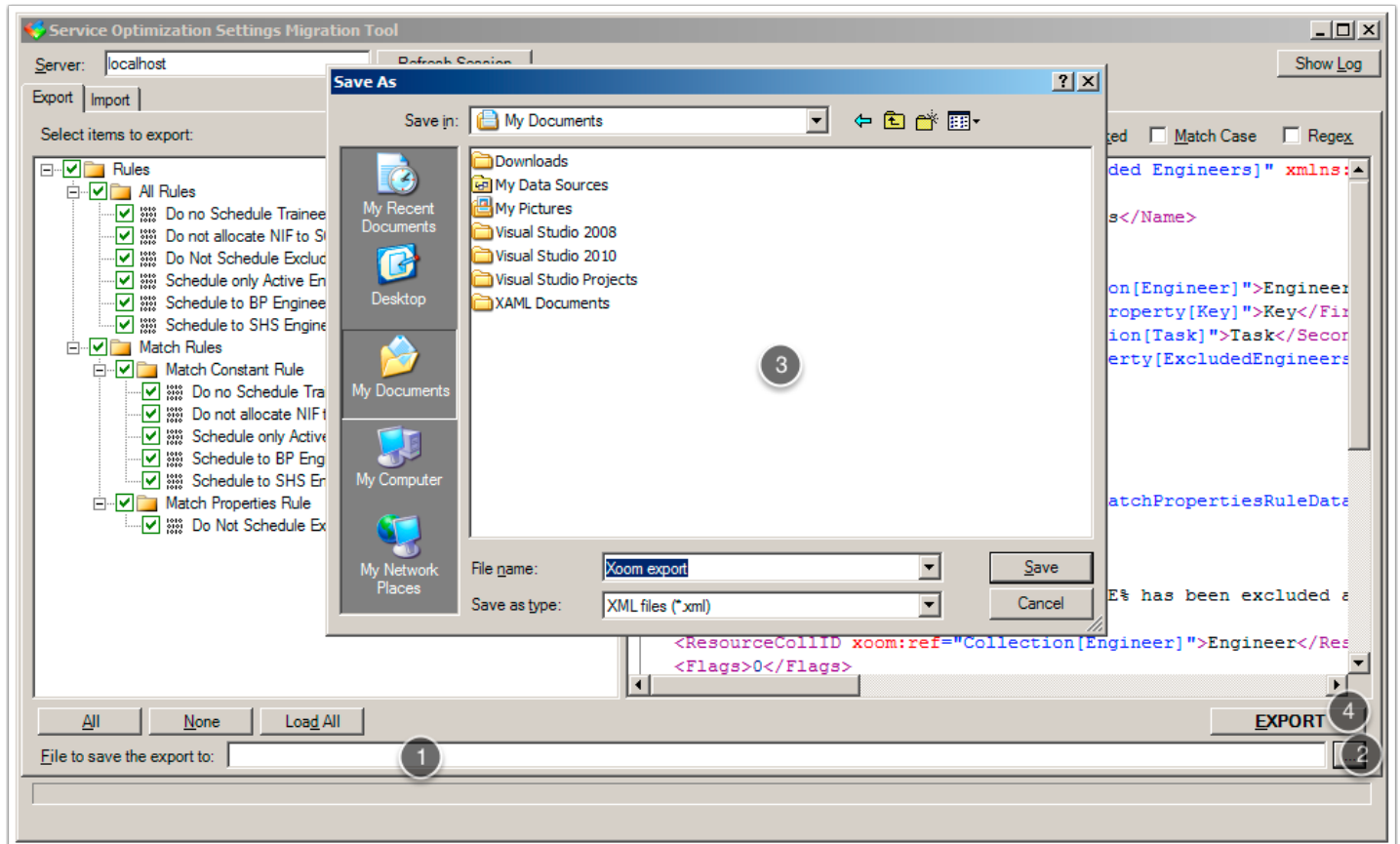
Before performing the export, it is advisable to verify whether all relevant items have been checked. In order to do that, we empty the search box (1) and check the Checked check box (2). When we do that, the configuration tree (3) will contain all the checked items anywhere in the configuration hierarchy. If we are happy with the selection, we can proceed with the export.



Specifying the export file and starting the export

To perform the export, we need to specify the file to which the exported configuration will be saved. We do this by either entering the file name (optionally including a full path) in the file name text box (1), or by clicking on "..." button (2), which opens the standard Save As dialog box that allows us to specify the file name. The tool will warn us if the selected file already exists.

Once we are happy with our file name, we click on Export button to start the export. (When the file name text box is empty, clicking on Export button will also open the Save As dialog.)



Dependencies and completing the export

After the export has been triggered, Xoom first retrieves all configuration items and categories that were directly selected for export. After that, it performs the dependency analysis, identifying any other configuration items on which the items that were directly selected depend, by following all references. The result of the dependency analysis is displayed below.

- In the first column (1) there is a list of items that weren't selected for export, but on which the selected items depend, either directly or indirectly.
- The second column (2) lists all items which the item in question directly references. For example, marked in red we see that "Complex Jobs Relevance Group" references a task group called "Complex Jobs".
- The third column (3) shows the reverse relationship, and lists all the items that directly reference the item in question. For example, marked in blue we see that "Complex Jobs" group is referenced by "Complex Jobs Relevance Group".
- Similarly to the export tab in the main window, we also have Check All (4) and Check None (5) buttons that will check or uncheck all currently displayed items. The currently displayed items are subject to filter (6).
- When we are happy with our selection, we click on Export button (7) to complete the export and save the file. We can also abort the export by clicking on Cancel button (8).

