

# **Database Administration**

## **File Locations**

Client file components will be installed by default to C:\Program Files\Emergent Technologies\Manager. Even though these files can be installed to any location, it is advised to keep them at the default.

Registries setting are found in: HKEY\_LOCAL\_MACHINE > SOFTWARE > Emergent Technologies.

# Audit Trail

The Audit Trail on the Contact Card shows any changes made to the data, including date and User.

🗉 Contact - Everest SPC Ltd 77 King Street, Toronto, ON										
	Save and Close 🚦 🗎	Copy 🕴 <u>R</u> efresh 🗙 Delet	🚦 Refresh 🗙 Delete 🔹 👸 Correspond 🔹 🙀 Eind							
Ge	General Other Addresses Details Documents Relations Audit Trail									
	Description	Old Value	New Value	Updated By						
	Contact Added	43042020		sa						
	Contact Address Added	43042020		sa						
	Address line 1		33 Hippo Way, 200,	sa						
	City	43042	2020 pnto	sa						
	State or Province		ON	sa						
	Postal Code		M3J K3K	sa						
	Street Number		33	sa						
	Street Name		Hippo Way	sa						
	Suite Number		200	sa						

## **Emergent Database Manager**

The Emergent Database Manager allow the administer an efficient way to apply database upgrades, Update Forms and Precedents, run custom scripts and backups directly to the database. Connect to the database with a secure log in window.

Emergent Database /	lanager	
Welcome to Em	ergent's Database I	Manager (emergent
	Database Connecti Server Name: Connect Using Windows A SQL Server Login name: Password: Database Name:	Your Server Name
		Connect Cancel

Then choose any of the options to maintain the database:

#### WORKFLOW SOLUTIONS...SIMPLIFIED



Emergent Database Manager							
Welcome to Emergent's Database Manager							
	Action Errors						
SP/COMP	Name	Run	▲				
No Co	ContactAddress	No					
	Copy of ON-OBC	No					
	CorpShareStruct	No					
I S I N	ETBorderShareC	No					
	ETBorderShareC	No					
	ETBYLAWN01.det	No					
	ETPercentageHo	No					
	ETSpecimenBord	No					
4	GetCntIDForTask	No					
	MB-AnnRetInfo2	No					
	MB-FORM01.det	No					
	MB-FORM01.dot	No	-				
Backup your Database			Run Cancel				

Back up your database before beginning any update process by selecting the Backup your Database button. Once done, an Operation Completed message will appear. You can then update your database.

Browse to the folder where the update files are located. You can place all of your update scripts and new templates in one folder and select it. Database Manager will update the database and transfer your scripts to your templates folder

Click the Run Button. Once complete, each task will be identified as having been completed.

## **Express Database Backup**

The Corporate and Estates ET database can now be backed up by anyone at anytime from within the program. Select **Help > Database > Backup current database**. This will create a file called ETManager.BAK located in the default backup location of your SQL server or MSDE installation

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	About		obate Files	🔚 Acti <u>v</u> ities	🔛 Rem
	Interactive Help		arch 🕓 C	rder Corporati	e Sunnlies
?	Help on Corporate and Estate Manager				c supplies
	Emergent Products	•			
	Corporate	•	te Report	Common Ta	sks 🗸 🧹 A
	Research	•	-		
	Licensing	•			
	Support	•			
	Database	•	Backu	p current data	base
		۲	Backu	p current data	base

**IMPORTANT!** This backup process overwrites the previous backup and only the latest backup remains. The backed up file is not permanently saved. It is advised that the ETMANAGER.bak file be moved to a permanent backup media.

# Support for Multiple Offices of the same firm:

If the database is being shared by multiple office locations of the same firm, individual files can be associated with a specific office.

To list multiple offices, go to **Tools > Options > Data Maintenance > Matter > Office/ Municipality/Region.** 

#### WORKFLOW SOLUTIONS...SIMPLIFIED



🔯 Lookup Data Maintenan	ce							-
🚊 Matter	^	Matter Office/Municipality/Region						
- Application Options			ID	Description	Region	Municipality	Prefix	Email V
Billing		Þ	1	Toronto	Metropolitan Toronto	City of Toronto	TOR	
DocGroup			2	Ottawa	Province of Ontario	City of Ottawa	OTT	
File Groups			3	Winnipeg	Winnipeg Metropolit	Winnipeg	WIN	
Matter Status		*						
Office/Municipality/Regio								
Player Type								
Research	v .							

Enter the Following information:

The Office City in the Description field. ٠

0

- The Region and Municipality ٠
- The Short Form Description of the office. This value will be used to identify which office a corporate record is • stored within the firm. For example, TOR-159 means the minute book is in box # 159 in the Toronto Office.

Once the Offices are set up, the office address needs to be associated with the office.

Open the Our Firm Contact and enter the address on the main screen and additional addresses tab. At the bottom of the address page, there is a drop down called office. Select the office that this address belongs to. The Mailing Address on the General Tab will be the "local" address.

		🖭 Address 🛙	etails	×		
		Address Pho	nes Effective Date			
		Street/Aven	ue/Boulevard/Drive	1		
		Number:	123			
		Name:	Main Street			
		Suite/Apt:				
		P.O. Box:				
		Address:	123 Main Street			
		Department:				
		City:	Toronto   Postal Code			
		State/Prov:	Ontario M4E 1E7			
		Country	Canada			
		Office:	Toronto			
			Ottawa			
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		Search A		el		
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	Save and Close	Copy C	ontact 🗎 <u>C</u> opy 🌻 <u>R</u> efresh 🗙 <u>D</u> elete	්බ් (	Corres <u>p</u> ond •	æ Sh
<u>G</u> e	neral Other Addres	sses De <u>t</u> ails	Documents Relations Audit Trail Social	<u>N</u> etworki	ng	
		New Address	Find			
Ad	ditional Addres	ses				
	Full address of Con	itact		Default	Туре	Effec
▶	246 Central Street,	Ottawa, ON,	KOK E3R, Canada	É	Mailing	
	2835 Pembina Roa	ad, Winnipeg,	MB, D92 F9E, Canada	És	Mailing	

When creating a new file, the Office will be selected on the Administration Tabs of records, as well as the Registered Office for Corporate records.



Emergent