UC Logic Limited

iSync

Worksite Database Replicator

Version 10.0

Implementation and

User Guide

UC Logic Limited

ISync Worksite Database Replicator

Implementation and User Guide

Document Version: 1.0

Last Updated: 4th May 2018

Product Version: 10.0

© 2018 UC Logic Limited

For information contact:

Email   support@uclogic.com

Web   www.uclogic.com

Table of Contents

1. Overview

Managing multiple iManage databases is often a time-consuming process. Each amendment would normally need to be made to each individual database. This is not only a long process but can introduce inconsistent data between different databases.

iSync replicates iManage database administration data, using a designated 'primary' database. This 'primary' database is updated using standard iManage database administration tools; iSync then takes over to replicate this data to all other 'slave' databases.

The replication event can be initiated manually or scheduled using the integrated scheduler routine. This allows fully unattended replication to take place at 'quiet' times for the network.

Individual tables can be selected to be either available or unavailable for synchronising, allowing for selective updating of database information.

2. Requirements

- iSync should be installed on a Windows Server (2008/2012/2016) 32/64 bit OS.
- Worksite database schema version 9.0, 9.1, 9.3, 9.4, 10.0, 10.1, 10.11 – The primary database must be a version 10 database schema and the same version as all the slave databases or a higher version. If the primary database is an older version than any slave database, this synchronisation is not supported.

Support for synchronising database:

Primary	Slave
10.11	10.11
10.11	10.1
10.11	10.0
10.11	9.4
10.11	9.3
10.11	9.1
10.11	9.0
10.1	10.1
10.1	10.0
10.1	9.4
10.1	9.3
10.1	9.1
10.1	9.0
10.0	10.0
10.0	9.4
10.0	9.3
10.0	9.1
10.0	9.0

- The server should have the Microsoft SQL client components installed (same version as running on Worksite SQL server) MS SQL 2005, 2008 and 2012 are supported.

e.g. For SQL 2008
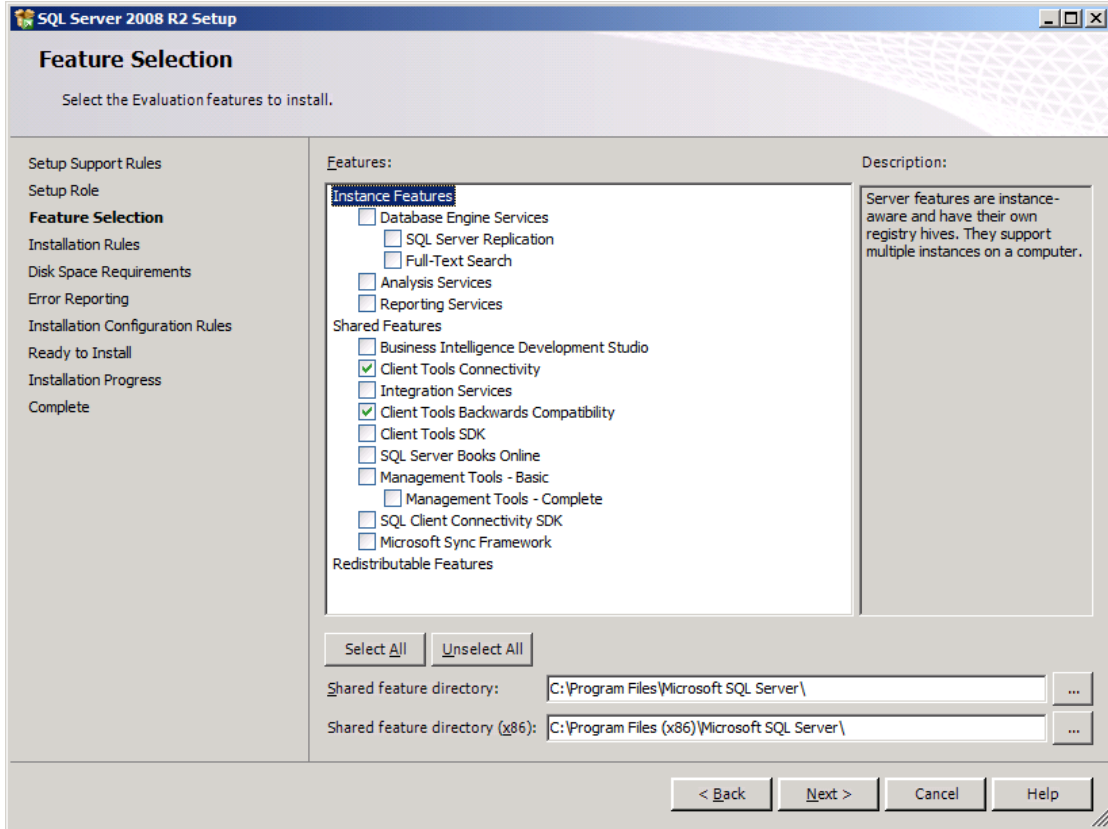
- Microsoft .NET Framework 2.0
- Ad Hoc Distributed queries should be enabled on all SQL Servers being accessed by the iSync application.

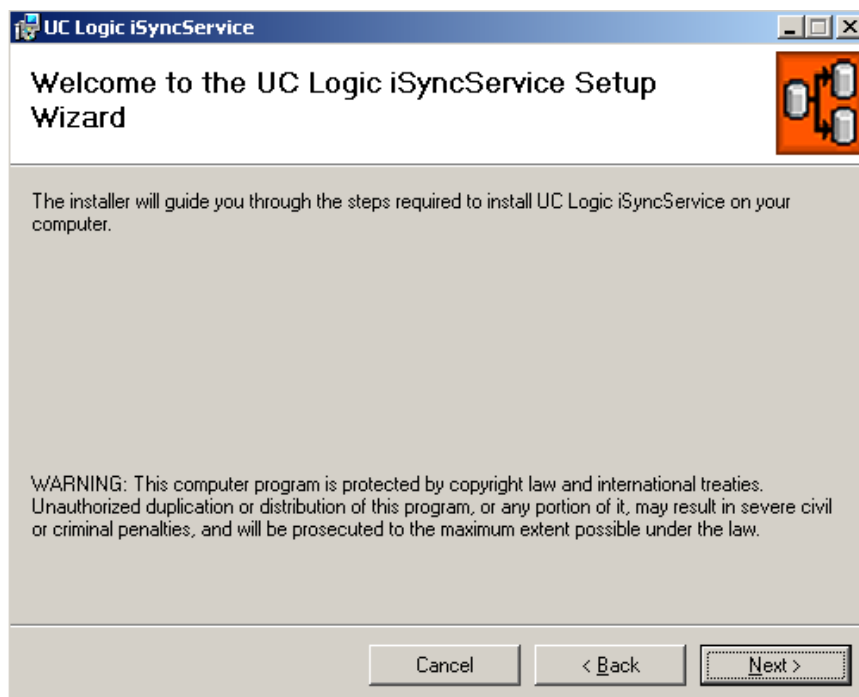   Ru the following SQL script to enabled distributed queries

```
Exec sp_configure 'show advanced options', 1
RECONFIGURE
Exec sp_configure 'Ad Hoc Distributed Queries', 1
RECONFIGURE
GO
```
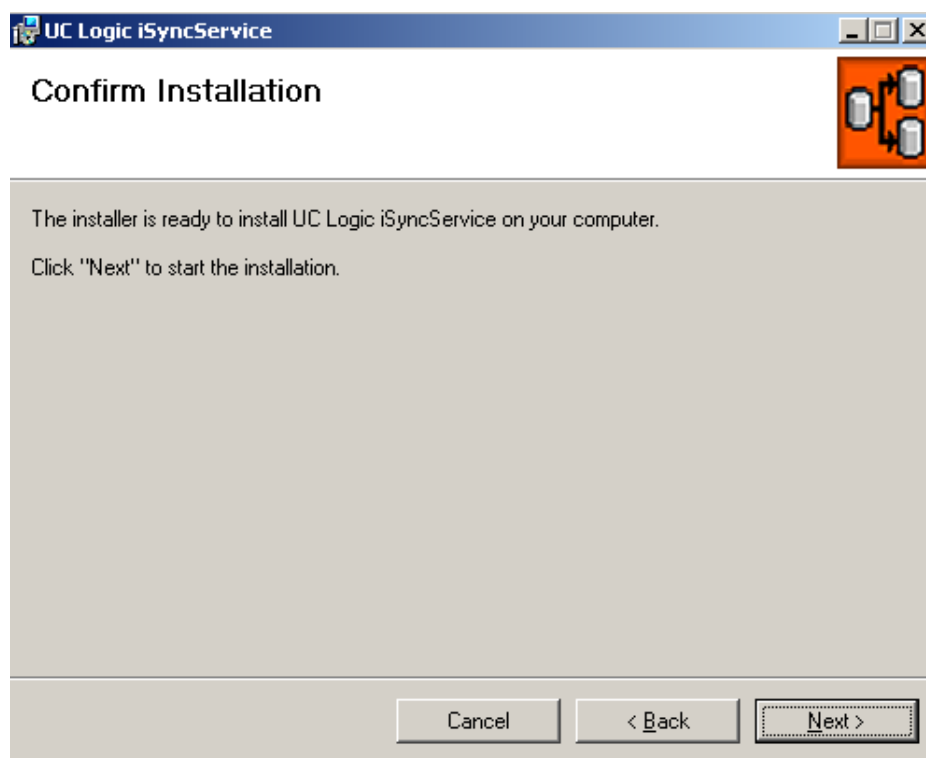
3. Installation

Run the setup.exe installation application
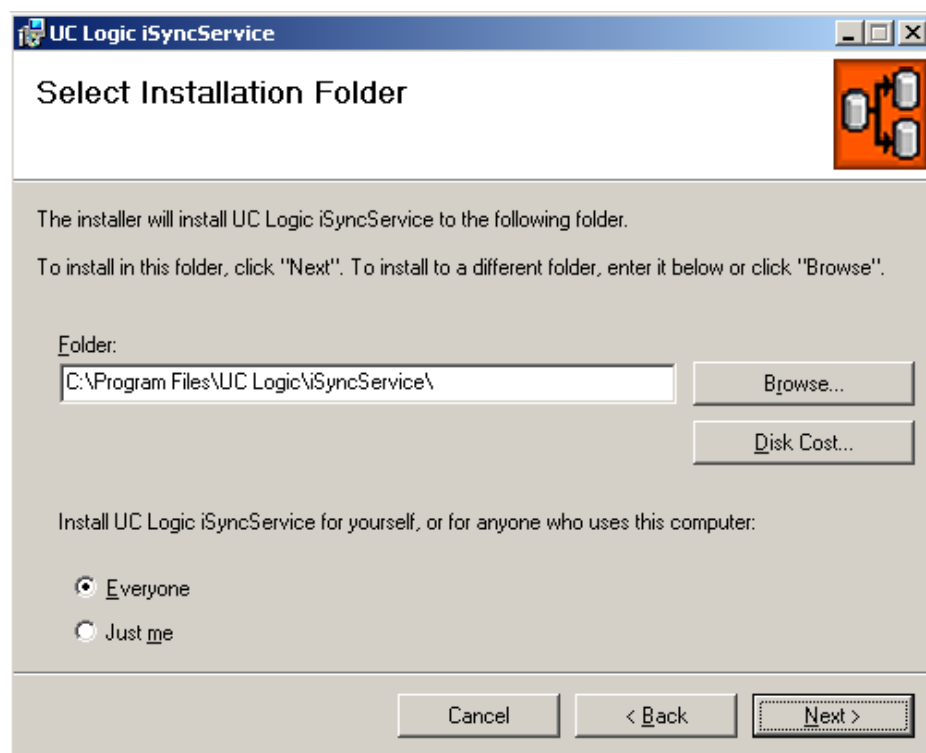
When the installation is complete there will be a new program group on the Start Menu created for UC Logic – iSync – iSync Manager

4. Configuration

The iSync application consists of two modules

- iSync Manager
- iSync Service

All configurations take place using the iSync manager application.

Load the iSync Manager program

You now need to configure the set of databases for iSync to replicate.

4.1. Add a database

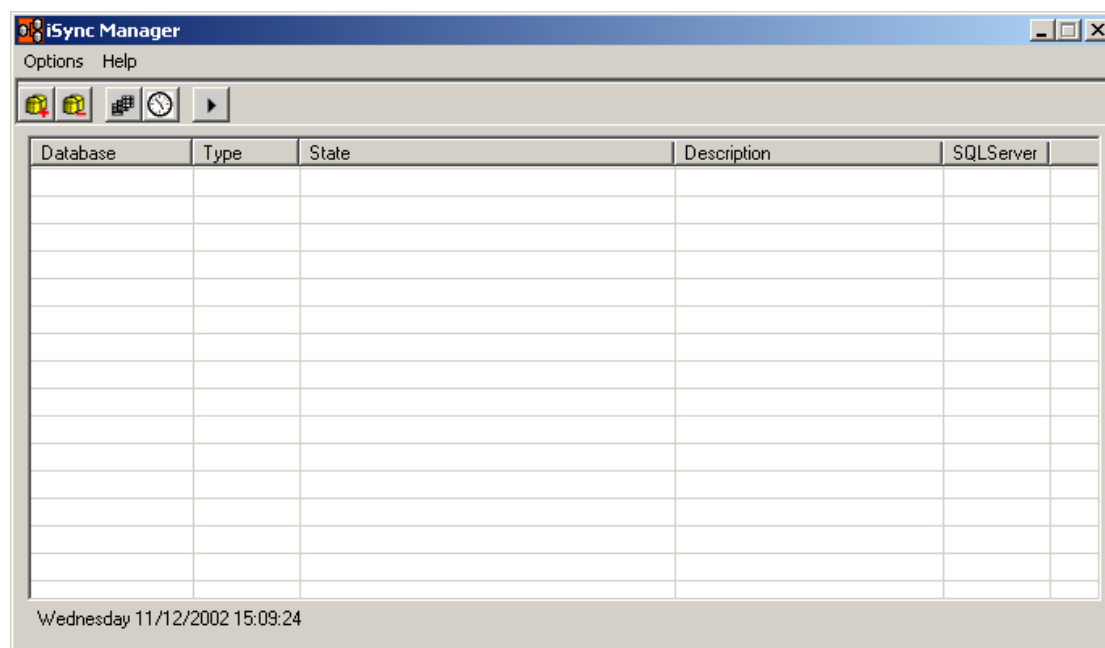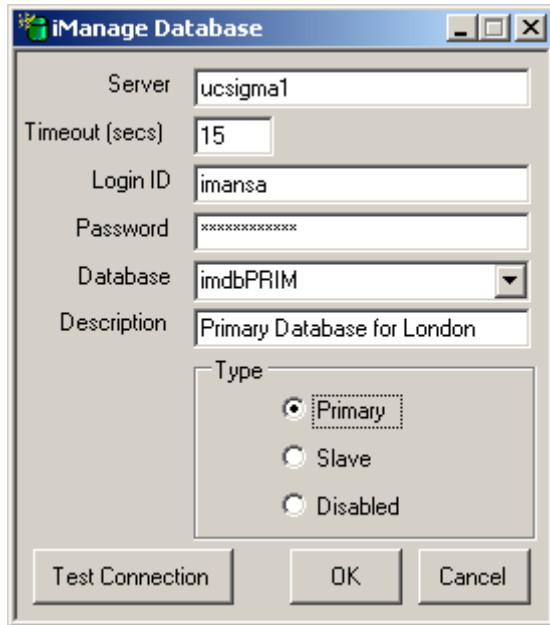There are four ways to add a new database:

- Click the ![icon] icon from the toolbar
- Right click in the database list window and select Add
- Use the Options menu, Database, Add command
- Use Ctrl-A

Enter the following information:

Parameter	Description
Server	SQL server name or IP address
Timeout	SQL command timeout. 15 Seconds is the default, which is adequate for most local area network implementations. Increase this value for wide area network or if there are SQL timeout errors
Login ID	A valid SQL login id with access to the database
Password	Corresponding password for SQL login id
Database	The SQL name of the iManage database
Description	Free test description field
Type	Primary – Source database, this database will be the master database used to replicate data out to all other databases. There can be only one primary database. Slave – A database that will be synchronised. Disabled – Stop this database from being synchronised. This option can be used to temporarily remove a database from the synchronisation loop.

After adding the database it will be shown in the main window

Add other databases that need to be synchronised with the primary database.

Database	Type	State	Description	SQLServer
dbHK	Slave		Hong Kong Database	HongKong01
imanage	Slave		UC Logic Primary	ucsigma1
imdbBackup	Slave		Backup Primary Database	ucBackup
imdbCorporate	Slave		Corporate Database	ucLondon
imdbFamily	Slave		Family Database	ucLondon
imdbLitigation	Slave		Litigation Database	ucsigma1
imdbNY	Slave		New York Database	NYSQL01
imdbPRIM	Primary	Not Scheduled	Primary Database for London	ucsigma1
imdbPrivateCli...	Slave		Private Clients Database	ucLondon
imdbProperty	Slave		Property Database	ucsigma1
imdbServices	Slave		Services Database	ucsigma1
imdbtest	Disabled		test	test
webdb	Slave		Web database	ucsigma1

Wednesday 11/12/2002 16:33:47

4.2.　Remove Database

There are four ways to add a new database:

- Click the icon from the toolbar
- Right click in the database in the list window and select Remove Database
- Use the Options menu, Database, Remove command
- Use Ctrl-R

Removing the database deletes the settings for that database. An alternative option is to set the database to 'disabled' if the database is to be used in the future. See the section on *Changing a databases' Type.*

4.3.　Changing a databases' type

A database can have three states:

- Primary – Source database, this database will be the master database used to replicate data out to all other databases. There can be only one primary database.
- Slave – A database that will be synchronised.
- Disabled – Stop this database from being synchronised. This option can be used to temporarily remove a database from the synchronisation loop.

To change the type of a database:

- Right click the database and select
  Set Database Type, Primary|Slave|Disabled
- Highlight the database and use the Option menu, Database, Set Type to Primary|Slave|Disabled
- Use Ctrl-P (Primary)
- Use Ctrl-S (Slave)
- Use Ctrl-D (Disabled)

Note: There can be only one primary database, if you change the status of a database to primary, the current primary database will be automatically changed to disabled.

You can change a group of databases together by using the multiple select keys (Shift or Ctrl) then selecting the relevant option.

4.4.   Replicating Tables

Replication occurs between a primary database and a slave database only for those tables that have been configured to be replicated. Each database has a table configuration that enables or disables tables from the replication event. The following tables are available for replication.

Table	Description
Users	User id and login details
Security Templates	Global security templates and user assignment
Groups	Group names
Group Members	Group membership (will add and remove users from groups)
Roles	Role names
Role Members	Role membership (will add and remove users from roles)
Document Classes/Sub Classes	Document classes and sub classes together. These two tables are replicated together
Database/Libraries	Database names
Document Types	Document Type definitions
Apps	Application definitions
Custom1	Custom data
Custom2	Custom data
Custom3	Custom data
Custom4	Custom data
Custom5	Custom data
Custom6	Custom data
Custom7	Custom data
Custom8	Custom data
Custom9	Custom data
Custom10	Custom data
Custom11	Custom data
Custom12	Custom data
Custom29	Custom data
Custom30	Custom data

A table will only be replicated if both the primary and slave table are checked. This allows for selective table replication to different databases.

4.4.1. Configuring Primary Database Tables for Replication

The starting point for selecting tables for replication is to configure the primary database tables.

Highlight the primary database then either:

- Right Click and select Tables

- Click the Tables icon on the toolbar

- Select Options|Database|Tables from the menu

The table selection dialog should now appear
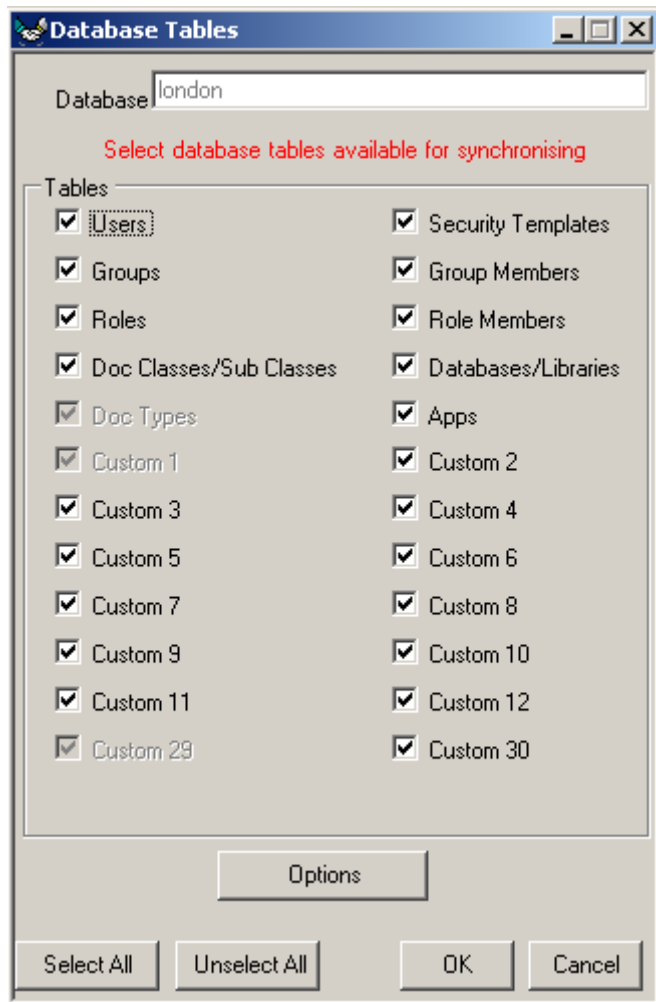
***Note: the options button only appears for slave databases***

Select the tables that should be available to be replicated from the primary database.

Note: Some tables can only be replicated together. The program will automatically select the relevant parent table in these instances.

| Table	Automatic Selection
Group Membership	Groups
Role Membership	Roles
Apps	Doc Types
Custom2	Custom1
Custom30	Custom29

4.4.2. Options

There are customisable options that can be set for each database. This is where specific fields can be excluded from the synchronisation process. At present only a few fields are available for exclusion. For more requirements please contact support@uclogic.com
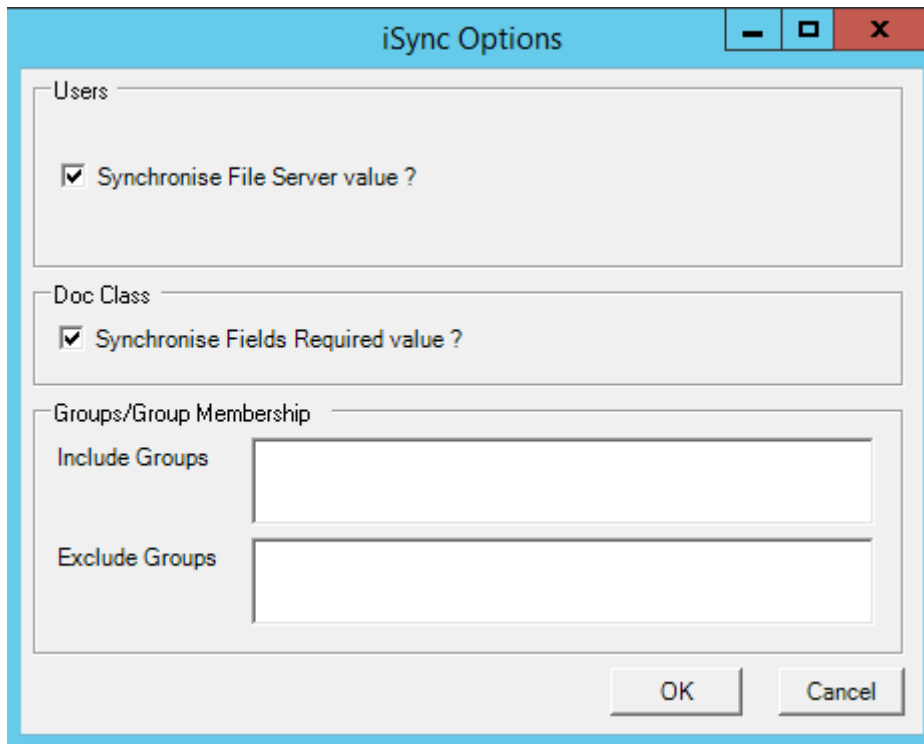
If you do not want to synchronise the File Server field for users make sure this check box is unchecked, this will cause the Alias File Server Field to be displayed. If you do not enter a value in the Alias File Server field, new users added to the slave database will inherit the File Server value from the user in the primary database. If you enter a valid Alias File Server value then new users will get the Alias File Server value when they are added to slave databases.

Note: You must manually add the File Server values using the Worksite Database Administration program for all databases. This table is not synchronised with iSync due to the fact that each database will tend to have separate unique file server settings.

.
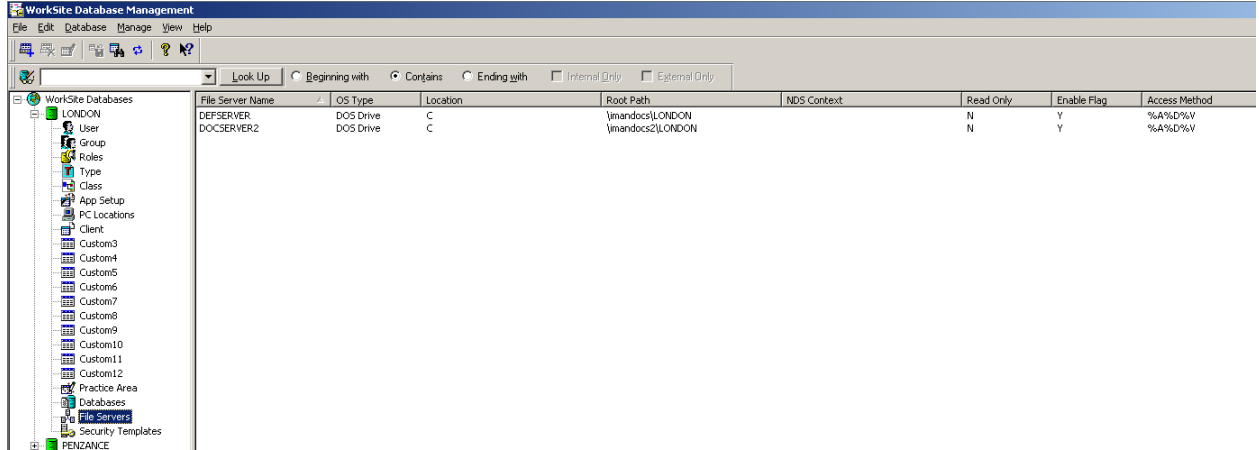
If you do not want to synchronise the Doc Class Required field, make sure this check box is unchecked.

You can specify for the slave database to only receive certain groups during the synchronisation process. Enter a list of group to include separated by commas or enter a list fo groups to exclude.

4.4.3. Configuring Slave Database Tables for Replication

This process is much the same as for the primary database. Simply highlight the slave database and proceed as described above.
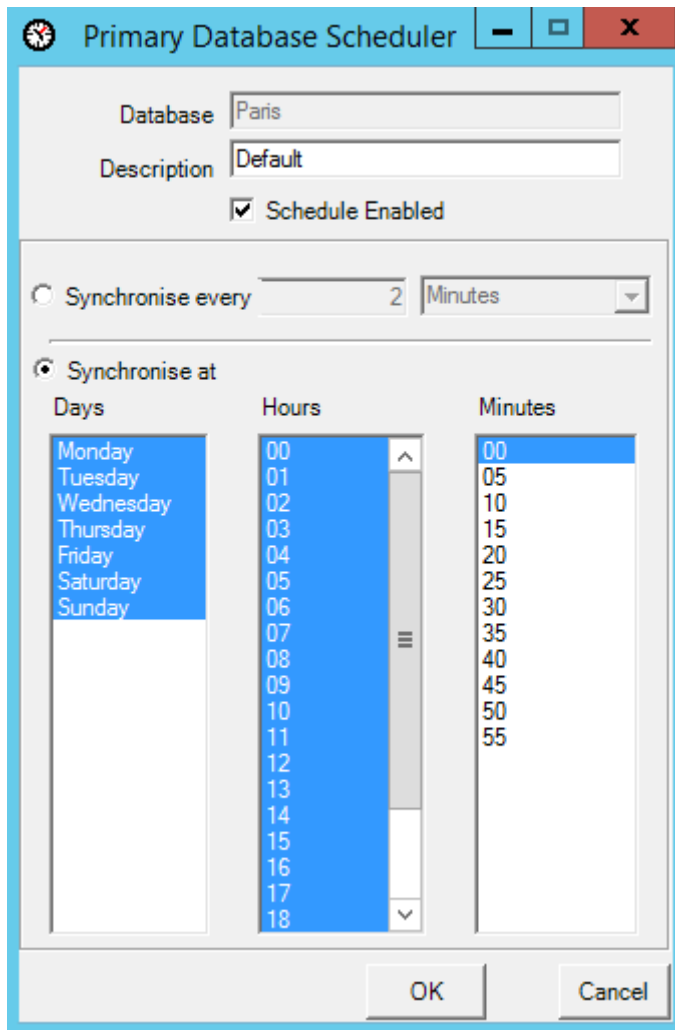
5. Scheduler

The scheduler can be used to configure a timed replication event. You can set a specific timed schedule using the days, hours and minutes columns or a repeating schedule based on a time interval. To enable either of these schedules, make sure the Schedule enabled checkbox is checked. If the schedule enabled check box is unchecked a once only synchronise will occur when the service is started.

Only one schedule can be configured and it is applied to the primary database and all slave databases. Disabled databases are excluded from the scheduled event.

To configure the scheduler:

- Click the scheduler icon from the toolbar 🕐
- Right click in the database list and select Schedule.
- Use the menu Options|Database|Schedule

The Schedule dialog should appear

Choose the days, hours and minutes for the schedule process to occur. The above example shows a schedule for every day, every hour on the hour.

6. Running the iSync Service

The installation process will have created a new service called iSyncService, you may need to alter the service logon settings to make sure it is running under an account that has the ability to run as a service on the server. The service is installed to run under the local service account, which is usually sufficient for most implementations.
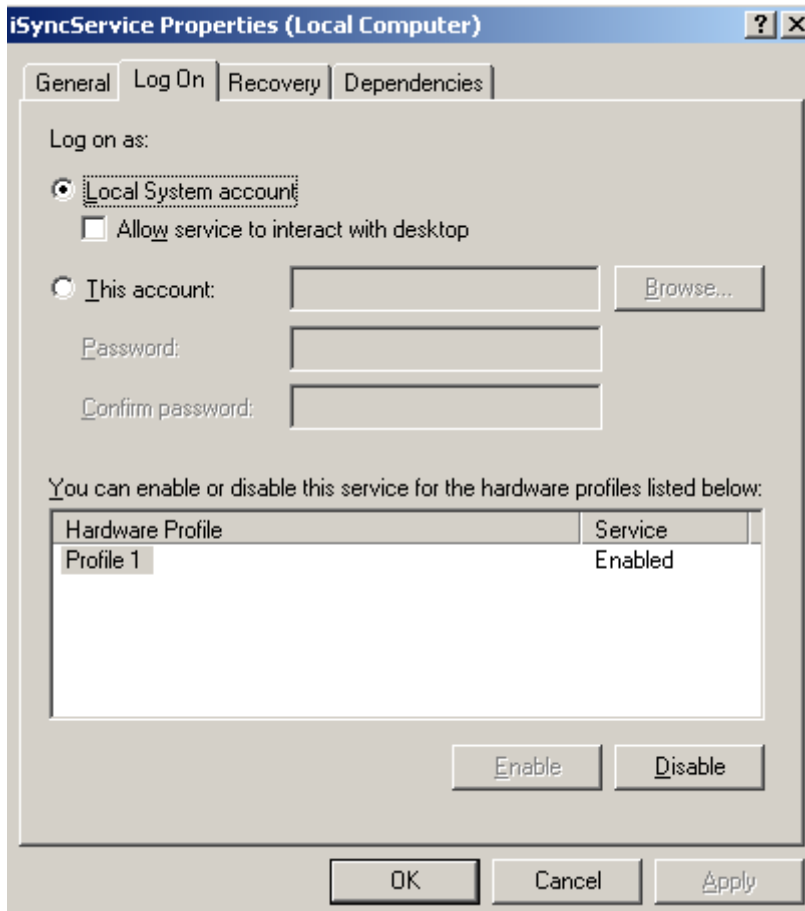
You can either start the service from the Windows services application or use the iSync manager toolbar buttons

Click the black arrow to start the service and the black square to stop the service. The green arrow shows the service is running, if the service is not running this becomes a red circle.

7. Log Files

A log file called iSyncLog.txt will be generated in the installation directory, usually C:\Program Files\UC Logic\iSyncService

There is also a custom iSync event log that can be viewed using the Windows Event Viewer application.

In the event of any problems check the event log and the log file, and make sure you include these with any support questions.