Construction Connected

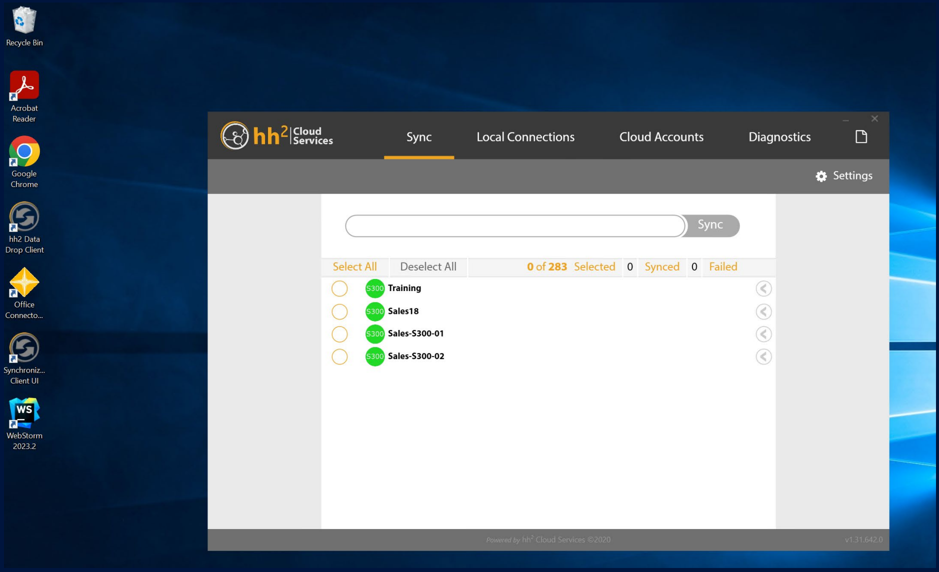
Workshop #14: Targeted Syncs & Troubleshooting

This guide is designed to provide you with the tools to run manual syncs if data is needed immediately, or targeted syncs if data is missing. This guide will also provide guidance surrounding basic troubleshooting steps to resolve syncing issues quickly and minimize downtime. If at any time you feel you need assistance troubleshooting or syncing data, please contact support@hh2.com.

Server: Sync Tool Overview

1. *What is the sync client, and how do I access it?*

   - Your sync client is the tool that we use to push and pull data to and from your accounting system. This is typically located on the server where your accounting system is installed and often needs to be accessed by your IT Department.
   - Here is a screenshot to show what the sync client looks like when launched:



   - Breakdown of the sync client setup:
     - The **Sync** tab will show all connections that we have configured, and you can trigger a sync for each folder directly from this screen. This tab functions like the Accounting Sync option from your hh2 page, so there shouldn't be a need to run a sync from the sync client directly, except for the initial setup.
     - The **Local Connections** tab is where we configure the items displayed on the Sync tab. Often there is just one connection, but if you have multiple data folders within your accounting system, we will need to create a connection for each one individually.

- The **Cloud Accounts** tab is where we link your accounting system data with the hh2 site that it needs to be mapped to.
- The **Diagnostics** tab will allow us to test the connections after initial setup to verify that everything is syncing as expected.

2. *Support directed me to restart my sync services; how do I do this?*

- In situations where your sync connection is disrupted, you will want to restart the 'hh2 Synchronization service' on your server to re-establish the sync connection between your accounting software and hh2.

  There are several occasions where you will want to stop or restart the service on your server. Some of these things include:

  - Regular Server Maintenance or Security/Firewall upgrades
  - Accounting System upgrades
  - Key Code Changes – Please see article regarding key code changes as these need to be scheduled with our support team in advance to avoid complications: https://global.hh2.com/Public/html/Article.html?article=eed9bc41-a525-44cc-abfe-a928009ff357
  - When you run a manual sync from your hh2 site and you receive a message that your sync client is not responding.

- When any of the above happens, please contact your IT to restart your *'hh2 synchronization service'*. This can be done by following the instructions below:
  1. Access your server (where the hh2 Sync Client is installed)
  2. Click on the 'Start 'menu in the lower left
  3. Click on 'Administrative Tools'
  4. Click on 'Services'
  5. Find 'hh2 synchronization service' and right click to stop and then again to start

  NOTE: If restarting this service does not resolve your syncing issue or if this appears to be a persistent problem, please reach out to support by clicking on the phone icon in the lower left corner of your hh2 site and submitting a support ticket. Please include a detailed description of the issue you are experiencing as well as a specific example of data that you are missing from hh2 due to your sync issue.

Website: Accounting Syncs & Troubleshooting

1. *How do I know if I need to run a manual sync?*

- There are two main reasons why you may need to run a manual sync of data from your accounting system into hh2:
  - 1. You have entered new information in your accounting system and need it synced outside of your set automatic sync times. (This is typically set to every hour, at the top of the hour.)
    2. You find there is a key item missing from hh2.

NOTE: To run a manual sync, you will first need to ensure that you have the proper user permissions.

- *From the homepage, go to User Setup > find and select your user ID > select the Permissions tab > verify that the box for Can Sync is selected.*

2. *How do I run an Accounting Sync?*

- On the main homepage, you will see the option for **Accounting Sync** under *Your Company's Data*.

   1. Once on the accounting sync page, click the filter icon in the upper left corner.
   2. Set the *Date Range* for when the new information was added to your accounting system.
   3. Leave *Sync depth* on *Shallow Sync*.
   4. Under the column *Data Types to Sync*, check the box next to any items needing to sync over into hh2.
   5. Click *Apply Settings*
   6. *Start Sync*

3. *How do I run a targeted sync?*

- If there is a key item you are missing, in the filter settings next to key sync items there is a binocular icon. You can click on this icon and enter keywords to help specify the search. For example, if you are missing job 1234:

   1. Check the box next to *Job*
   2. Click the binocular icon beside *Job*
   3. Enter the *Job ID* (ex. 1234)
   4. Click *OK*
   5. *Apply Settings*
   6. *Start Sync*

  NOTE: If you enter a name for a key item, it needs to be the exact name shorn in your accounting system, including capitalization.

Best Practices:

- ***DO NOT*** run a deep sync without the assistance of hh2 Support. If not done correctly, this could tie up your sync process for days as it could queue up all data in your Accounting System and will need to complete before it can sync any new data.

- If you have finished running a manual sync and you are still noticing information is missing, please reach out to support by clicking on the phone icon in the lower left corner of your hh2 site and submit a support ticket. You can also email us at support@hh2.com. Please include a detailed description of the issue you are experiencing as well as a specific example of data that you are missing from hh2 in order for the team to investigate further.