Data Uploader Upgrade Instructions and Release Notes 5/28/2020

With the latest Data Uploader update, there is a new Data Uploader application which contains many enhancements for setting up connectivity to your organization's source systems for provisioning, organizing provisioning files, and providing more options for synchronizing users and groups. New configuration files help better filter, organize and update users and groups for provisioning into the downstream content systems like the DMS or Office 365.

Some of the main features include:

- Each SQL file now has a unique run schedule.
- Data Uploader now includes sample SQL files for various operations from create workspaces to teams, shortcuts, users and more.
- The Owner field is now supported in Data Uploader and CAM as a metadata field.

Issues Resolved includes:

- Uploading a CSV for team/channel/tab creation in the Jobs tab is causing the CSV to get uploaded multiple times. (Cloud-5661)
- Data Uploader displays a blank screen on loading after upgrading to the new Data Uploader. (Cloud-5308)
- Active Directory Nested Groups are not included when selecting Flatten Nested Groups. (Cloud-4671)

Upgrade Steps

Because of the addition of so many new features, upgrading the Data Uploader requires a few detailed steps depending on how Data Uploader is currently configured in your organization. ***Please review all of these steps in detail prior to installing the new Data Uploader***

Installation Steps:

1) **Review the Hardware and Software Requirements for Data Uploader.**
2) **Make a backup copy of the current Data Uploader installation directory**
    a. Prosperoware Data Uploader folder found at: *C:\Program Files (x86)\Prosperoware\Prosperoware Data Uploader*
3) Uninstall the current version of the Data Uploader
4) Log into your CAM website.
    a. If you have been already logged in, sign out and sign back in to ensure the latest update is applied.
5) From the **Administration** tab click on **Downloads**.
6) Download CAM Data Uploader.
7) Run the installation wizard. Click **Next**.
8) Keep the install folder path the same. Click **next**.

****Note**** The installation directory has changed slightly to "C:\Program Files (x86)\Prosperoware***CAM***\Data Uploader\"

9) This version of the Data Uploader now required that you enter a Windows Services domain, username and password of the service account.
10) Click **Install** to begin install.
11) Once the install is complete, click **Close** to close the wizard.
12) Prior to launching Data Uploader, you must first complete all the steps below.

Configuration File Update Steps:

The new Data Uploader application has replaced many of the previous configuration files with new config files. Since the following instructions for copying old configurations to the new files references line numbers, we recommend you use a program like Notepad++ or other tool that has line numbering available.

All configuration files are now in a directory under the install path called config located here:

C:\Program Files (x86)\Prosperoware\CAM\Data Uploader\service\config

If you have made any configuration changes to the following files, please follow the instructions below to copy your configurations to the new files. If you have not modified any of these files, you can skip this section.

- ActiveDirectoryIntegration.config
- Data.config
- UserPropertiesMapping.config

1. ActiveDirectoryIntegration.config → ADMapping.config

If you did not make any changes to the ActiveDirectoryIntegration.config, you may skip to section 2.

1. Open the backed-up ActiveDirectoryIntegration.exe.config file.
2. Copy the lines between the <configuration> and </configuration> tags.
    a. Exclude lines
    <startup>
        <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.6.1" />
    </startup>
3. Paste the configuration in the ADMapping.config file between lines 2-51.
    a. Use the commented lines 2-48 as mapping for AD. Samples are commented.
    b. Use commented lines 49-51 as fields for AD. Samples are commented.

2. Data.config →ADMapping.config

If you did not make any changes to the Data.config, you may skip to section 3. If you applied filters for users and groups in the Data.config file, you will need to recreate these manually in the new ADMapping.config as there have been some changes. There are instructions in the ADMapping.config on how to apply the user and group filters.

1. Open the backed-up Data.config file and note all the filters applied.

2. Recreate the filters logic between the <configuration></configuration> tags.

3. UserPropertiesMapping.config →ADMapping.config

If you did not make any changes to the Data.config, you may skip to this section.

1. Open the backed up UserPropertiesMapping.config file
2. Copy the fields between the <fields> and </fields> tags to the same tags in the ADMapping.config (located at the bottom of the file before the **</configuration>** tag.

4. SourceFilesConfig

This is a new configuration file that allows you to set a separate unique identifier for each of your provisioning scripts. Some content systems might support a matter index Id for a unique identifier, while others might only be able to support client and matter id. This file configures the unique Id per script.

1. Open this file and update the uniqueId field. E.g.,
    a. <uniqueId columns="clientId,matterid" source="CreateOrUpdateWorkspace.sql"/>

SQL Scripts

1. Copy the scripts from the *C:\Program Files (x86)\Prosperoware\Data Uploader\sql* file to the new . *C:\Program Files (x86)\Prosperoware**CAM**\Data Uploader\sql*
    a. Out of the box the **CreateOrUpdateWorkspace.SQL** script is included in the **sql** folder. You can delete this script if you already have scripts created.
    b. If you have not created any scripts, you can edit this script for use in provisioning.
    c. Move any additional custom scripts to this **sql** folder.

Connection Strings

This section describes the new Connection Strings tab in Data Uploader and how Data Uploader is using, storing, and accessing data. In both the current and previous versions of data uploader, there exists a database called **ClientApp2.sqlite.** This database is used to store the scripts and results of the queries. This database is also used to run on-premises comparisons of the csv files for matter provisioning and user & group management to improve performance and cut down on unnecessary transactions due to false positives.

An example of this might be that a matter property that is unrelated to the workspace was updated in the time & billing system. Because the modification date on the matter in that system was updated, it might feed through many matters into the provisioning csv. However, since none of those matter changes are related to the workspace as provisioned by CAM, CAM still needs to compare each matter entry to make sure no data has changed that would need to be updated in the downstream system (iManage, NetDocuments, etc.). By running a comparison of the files by Data Uploader using an on-premises database, we can only submit matter jobs with true changes – improving overall performance.

With the new Data Uploader, you have the option to continue using the sqllite database, now called **CamLocal.sqllite,** or if you are a larger organization, we might suggest you create an on-premises SQL database for this purpose. Sizing recommendations can be found at On Premises Recommendation.

1. Using Sqllite

If you are using the local sqllite database, follow these steps to restore your backed-up copy of this file to the new directory:

1. Go to the *C:\Program Files (x86)\Prosperoware\CAM\Data Uploader* and rename the **CamLocal.sqllite** file to **CamLocal.sqllite.old**.
2. From your backup directory, copy the ClientApp2.sqllite file and paste it into the *C:\Program Files (x86)\Prosperoware\CAM\Data Uploader* directory.
    a. Rename your **ClientApp2.sqllite** to **CamLocal.sqllite**.
        i. When you run DataUploader, the schema will get upgraded to the latest version.
3. You must now copy the connection string information from your backed-up Data Uploader to the new ConnectionString.config
    a. Open the backed up Prosperoware.DataUploader.exe.config file
    b. Copy the connection strings from lines 32-34 with tags <connectionStrings> and </connectionStrings> (lines may differ)
    c. Paste these into the ConnectionString.config file located under *the C:\Program Files (x86)\Prosperoware\CAM\Data Uploader\service\config* directory.
4. Please go to step 3 for instructions on running the new Data Uploader for the first time.

2. Using SQL Database

If you are using a SQL Database, it is recommended you recreate the connection strings to the source database for workspace provisioning. This will be outlined in the steps below.

1. If you are using an on-premises SQL database, create a Database – suggested name = "**CAMLocal**"
    a. In order to create a connection string to this database, CAM will need an account that has dbo rights to this database so it can create the schema and manage the data in this database.
    b. The schema for this database will be created after you launch Data Uploader and create a connection string to this database outlined in step 3, item 5.

3. Running Data Uploader

When you first run the new Data Uploader you must run as an administrator.

1. From the Windows Start menu, right click on Prosperoware Data Uploader and Run as administrator.
2. If Data Uploader prompts you to reauthenticate, put in the tenant URL then the user email and password for your CAM account.
3. Click on the Connection Strings tab
4. If using the sqllite database, and if you copied your connection strings configurations to the new ConnectionString.config, you should see your connection strings here.
    a. If not, then you can manually add the connection string by selecting Add, then selecting the "Select Connected System" as Source Database.

5. If using an on-premises SQL database, ***you must first create the CAM Local Database connection string before creating any other connection strings***.
    a. Click the **Add** button
    b. Create a name for your connection string, e.g., CAM Local
    c. From the "**Select Connected system**", choose **CAM Local Database**
    d. Select whether this is a direct SQL Connection or ODBC Connection
        i. If ODBC, you will need to add a connection string
    e. For SQL Connection
        i. Type in the name of the SQL Server or instance
        ii. Type in the name of the Database
        iii. Select login type and pass the correct credentials – reminder that this account needs to have dbo rights to this database
        iv. Click **Connect** or **Save**
    f. You may now add all other desired connections to the data source for the workspace provisioning. Make sure to select **Source Database** form the "**Select Connected System**" drop down.

Other Verifications

Click on the other tabs to verify that the data from the old configurations have copied over correctly:

1. SQL Files

1. Click on the SQL Files tab and click the **Refresh** button if you do not see your sql files. If you still do not see them, make sure you copied them to the correct directory.
2. Next to each script, click the hamburger menu and select **Edit**
    a. Select whether you want to enable this script and select the appropriate connection string against which this script will be executed. – we now support multiple databases against which you can execute scripts.
3. From the hamburger menu, you can also select the **Validate** option to test and validate your scripts before you run them in production.

2. Active Directory

Click on the Active Directory tab and check that your LDP configurations have been copied over correctly. If you do not see them, go back and verify you copied the data correctly from the old configuration file to the new. Otherwise, you can recreate this by clicking the **Add** button.

3. CAM Agent Update

Data Uploader comes with a new CAM Agent. There is nothing you need to do to upgrade this – the old one will be uninstalled and a new one will be installed running under the service account credentials you provided during the installation. If you did not enter the correct service account for the CAM Agent, then you can update this by going to the Windows Services, double-clicking on CAM Agent and clicking the Log on tab.

If you are currently using the CAM Agent, just make sure it is running at some point during the upgrade.