Distributing Case Data Over Multiple Servers

AD Summation iBlaze Product Family Distributing Case Data Over Multiple Servers

NOTE: This document assumes a strong understanding of Summation iBlaze utilities and standard tables. If you are unfamiliar with the tools and tables discussed in this document, please contact AccessData Product Support for further assistance with this procedure.

Prior to beginning the steps outlined in this document, please ensure that you have a current, full backup of all case data.

ACCESSDATA IS NOT RESPONSIBLE FOR DATA LOST OR DAMAGED DURING THIS PROCESS.

Distributing the application and data over multiple servers involves different steps, depending on whether you want to relocate existing data or if you want to change the storage location for future cases. This document will cover both scenarios and provide instructions for distributing case data over multiple servers.

INTRODUCTION

In certain environments, it may be desirable to distribute the AD Summation iBlaze product family system, including application and data, over multiple servers.

Examples include:

1. Running out of space on an existing server.

2. Desire to improve system performance.

3. A need to segregate data for backup/restore purposes.

4. Apportioning resources to specific departments

DISTRIBUTION SCENARIOS

Distributing the application and data over multiple servers involves different steps, depending on whether you want to relocate existing data (Scenario 1) or if you want to change the storage location for future cases (Scenario 2). This document will cover both scenarios and provide instructions for distributing case data over multiple servers. This document does not cover moving your application from one location to another. For instructions on moving your AD Summation application directory and data, please consult Knowledge Base article 011403ECG: *"How to Move Cases from Your Program Directory to Another Location/Server."*

SCENARIO 1: MOVING EXISTING CASE DATA TO ANOTHER SERVER

Three types of case data can be moved/redirected to different servers: Images, eDocs, and Transcripts. You can choose to move one or more of these components based on your particular needs.

MOVING IMAGES TO ANOTHER SERVER

The path to images stored on the network is composed of various fields within the iBlaze system. The following is a primer on the composition of the image path, working backwards:

Imgfiles field – This field is located in the **Imginfo** table. This field typically contains just the name of the image file (e.g., 0001.tif). However, this field may also contain preceding subdirectory names (e.g., subdir2\0001.tif). Alternatively, this field may contain the full hard-coded path to the image file. Enumerating the entire path in this field is not recommended, but it is still valid and can override all other path components noted below.

Defdir field - This field is located in the **Imginfo** table. This field typically contains only the **@I** variable. However, this field may also contain trailing subdirectory names (e.g., @I\subir1). Alternatively, it may contain the hard-coded UNC or mapped-drive path (e.g. \\ SummServer\share\subdir\iBlaze\casedata\SmithCase\images\). Hard-coding the UNC or mapped-drive path is not recommended, but it is a valid entry and can override all other path components noted below. It will not, however, override the **Imgfiles** field noted above.

Image Location – This field is located in the **Case Customize** dialog. This path is a relative path by default and is typically the **IMAGES** directory which resides under the **Case Directory** (identified by the **Case Directory** field in the **Case Customize** dialog). This field can also be a hard-coded UNC or mapped-drive path to a location other than the default **IMAGES** directory. This path defines the value represented by the **@I** variable in the **Defdir** field of the **Imginfo** table, as noted in the **Defdir** point above.

TO MOVE EXISTING CASE DATA TO ANOTHER SERVER:

1. Determine the current default image location.
   a. From the Case menu, choose Customize to open the Case Customize dialog.
   b. Note the Image Location. The default is IMAGES, a relative path that refers to a subdirectory called IMAGES under the Case Directory. Case Directory is also specified in the Case Customize dialog.
   c. Once you have noted the current default image location, close the Case Customize dialog.

2. Open the Imginfo table to determine the current Defdir and Imgfiles entries. The Imginfo table can be viewed by right- clicking Core Database in the Case Explorer tree and choosing Select Form. Choose the Imginfo form. Be sure to note the current core database form name for later reference, the defaults are typically stdform or e-form.

TO MOVE EXISTING CASE DATA TO ANOTHER SERVER: EXAMPLE

Imgfiles field = subdir2\0001.tif Defdir = @I\subdir1 Image

Location = IMAGES

Case Directory = \\SummServer\share\subdir\iBlaze\casedata\ Smith-Case

AD Summation will be looking for an image located here:

\\SummServer\share\subdir\iBlaze\casedata\SmithCase\IMAGES\subdir1\subdir2\0001.tif

a. Check that the **Defdir** field is set to **@I** for all records (using the **tally** feature can help you determine this). The **@I** variable refers to the path entered in the **Image Location** field of the **Case Customize** dialog. If the **Defdir** field does contain hard-coded paths (for example a UNC path or mapped-drive reference such as \\servername\sharename\ or s:\somedir), you will need to use the global replace utility to replace all of the hard-coded pathing with the @I variable. If you are not familiar with the **Global Replace** utility, consult Online Help or contact AccessData Product Support at (800)786-2778.

b. Check that entries in the **Imgfiles** column refer only to the image file name and perhaps a sub-directory that contains the actual image file. This field should not contain a full hard-coded path to the image files. If the **Imgfiles** fields do contain full hard-coded paths (for example a UNC path or mapped-drive reference such as \\servername\sharename\0001.tif or s:\ somedir\0001.tif), you will need to use the **Global Replace** utility to remove all but the file name (and a sub- directory if appropriate). If you are not familiar with the **Global Replace** utility, consult Online Help or contact AccessData Product Support at (800)786-2778.

c. Once you have confirmed that the **Defdir** is set to @I and the **Imgfiles** column does not contain hard-coded paths (or that you have modified them as appropriate), set the **Core Database** form back to the original form (typically **stdform** or **e-form**).

3. Copy the contents of the existing **IMAGES** directory for this case to the new network location. For our example we will use \\Servername\Share\SmithCase\ Images.

4. Open the **Case Customize** dialog and input the full path to the new **Image Location**. Be sure to enter the entire path to the images, e.g., \\Servername\Share\SmithCase\Images.

5. Test the configuration to ensure that all of your images are available as expected.

MOVING eDOCS

The **eDocs** directory typically contains eDocs (e.g. Word documents, Excel files, etc.), eMail attachments (which can also be eDocs though they are associated with emails), and index files. Moving the eDocs folder is largely an automated process. eDocs can only be moved in iBlaze versions 2.5 and later; pre-2.5 versions require that the eDocs directory stay in the case directory and cannot be moved.

1. Open the **Case Customize** dialog.

2. The default location for the eDocs dir is eDocs, which is relative to the Case Directory.

3. Type in the full hard-coded path to the new **eDocs** directory (e.g., \\Servername\Share\SmithCase\ eDocs).

4. Click **OK** on the Case Customize dialog. A dialog will appear indicating the Case Information has changed. Click **Yes**.

5. A dialog will appear asking if you want to move the files and confirming the new location. Confirm that all of the path information is correct and click **Yes**.

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NOTE: The instructions on this page assume that you intend to move ALL images to the new image location. If you do not intend to move ALL images to the new image location (for example, you intend to have images located on more than one server or share), be sure to adjust the steps below to fit your environment. These adjustments may involve selectively exempting some of the Defdir and Imgfiles entries from the changes suggested in these steps.

NOTE: Before making any changes to the **Imginfo** table, whether individually or via the global replace utility, it is highly recommended that all users exit this particular case and that you have a current backup of the entire database.

6. AD Summation will begin moving the contents of the eDocs directory to the new location. The time required to complete this operation will depend on the size of the existing **eDocs** files.

7. Upon completion, test the case to ensure that the files were moved successfully.

MOVING TRANSCRIPTS

The transcript directory typically contains the transcript text files as well as the transcript index files. Moving the transcript directory requires two operations, copying the files to the new location and changing the transcript directory in the **Case Customize** dialog.

1. Open the **Case Customize** dialog.

2. Confirm the current location of the transcript directory. The default location for the transcripts dir is **TRAN** which is relative to the **Case Directory**.

3. Copy the contents of the **TRAN** directory to the new network location (e.g., \\Servername\ Share\SmithCase\TRAN).

4. When the contents of the **TRAN** directory have been moved successfully, change the **Transcript Dir** entry in the **Case Customize** dialog to the new location (e.g. \\Servername\Share\ SmithCase\TRAN).

5. Upon completion rename the old transcript directory for testing purposes and test the case to ensure that the transcript files were moved successfully.

SCENARIO 2 – CHANGE STORAGE LOCATION FOR ALL FUTURE NEW CASES TO A NEW SERVER.

In some instances, it may be desirable to specify a location for new cases to be created other than the default **casedata** subdirectory within the network application directory.

1. In the **Case** menu, select **Open**. The **Case Open** dialog will appear.

2. Right-click on the top of the case list tree (typically **Summation Cases**) and select **Set Case Create Location**.

3. Browse to the location where you want new cases to be created (e.g. \\NewCaseServer\Share\ SummCases). Click OK. When new cases are created, the new case data will reside in the new network location.

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NOTE: This procedure will place the entire contents of any new cases into the newly specified network location. If you want to redirect the images, transcripts, and/or eDocs outside of the standard case structure, see the instructions for Scenario 1 above. The redirection must be performed for each case as it is created.

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