

**ICT Data Sync Service**  
Upgrade Guide

**ICT<sup>®</sup>eSecurity.**

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# Introduction

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If you were previously using the ProtegeGX Data Sync Service, you can easily upgrade to the ICT Data Sync Service using the Data Sync Upgrade Tool during the initial configuration.

The ICT Data Sync Service incorporates the ProtegeGX SOAP Service to facilitate importing the required data. Using the ProtegeGX SOAP Service enables access to the power and functionality of ProtegeGX that was previously limited in earlier implementations of the Data Sync Service.

This guide only outlines the steps required to upgrade the Data Sync Service, for more information on the configuration and operation of the service, refer to the [ICT Data Sync Service User Manual](#).

If you were previously using the ProtegeGX Data Sync Service for importing schedules, or you were using the Clubware format with the Event File Export event functionality, please contact ICT Support (<mailto:support@ict.co>) before attempting the upgrade.

## How the Data Sync Service has Changed

This section outlines how the ICT Data Sync Service has improved on the ProtegeGX Data Sync Service:

- You can now import any type of record into ProtegeGX, the Data Sync Service no longer limits you to users
- You can import to any existing site using a dropdown. There's no longer any need to double check that the site name is entered exactly as it appears in ProtegeGX
- If the ProtegeGX Data Service is installed on a different PC to the third-party export system, Data Sync can still retrieve and import these files into ProtegeGX
- When using the **Delete Import File When Import Completed** option, the file is only deleted if the import is successful
- Changes have been made to the error messages that appear in the Windows Event Viewer. These changes make it easier to identify issues with the Data Sync Service
- The option to create a debug log has been added
- There are many fields that can take a regular expression (a special text string for describing a search pattern), for the advanced configuration of selecting import files, defining delimiters, skipping comments and validating import files
- New options have been added that enable you to specify where an import begins and ends within the import file. This ensures that you are only importing the data you need
- Data Sync now has the ability to skip rows that contain a certain character during the import process. For example, you can choose to skip comments that are prefixed with a hash symbol (#)
- The Validate Import File option now enables you to enter any string of text to validate that the import file is complete, not just <SOF> and <EOF> tags
- The Text Qualifier option enables the import of fields that contain delimitation characters (e.g. a comma) to import fields such as addresses
- The Unique Field is no longer limited to just a number, many fields in conjunction (such as Full Name and PIN) can be used as the Unique Field
- You can now enter the resynchronization time in minutes or hours
- You can now add fields to the import that do not exist in the import file
- The import file can contain text (such as a Yes or 1) in place of a Boolean with a conversion. This allows you to convert the field to a format that Data Sync expects to process. For example, if the import file contains a column labeled **Delete Record** that contains **1** and **0** entries, these fields can be converted to **true** and **false** as Data Sync requires. You are no longer limited to just **Y**, **Yes**, **True** or **Delete** as per previous versions of Data Sync
- Importing multiple records to assign to a single record has been simplified. For example, when importing multiple access levels for a user, the character separating the access levels now has no limitation. Previously, Data Sync only allowed these records to be separated by a semi-colon. Additionally, you can

now import grouped fields where two import fields correspond to a single entry in the import file e.g. Facility Code:Card Number;Facility Code:Card Number

- New data and time format options make it simple to ensure that the configuration is correct
- The Pattern field in the Advanced Data Configuration window enables you to enter a regular expression for advanced configuration. For example, where the fields are padded with extra characters (e.g. ^^Example Name^^) Data Sync is able to import the fields with the padding characters removed
- The delimited file format is no longer restricted to CSV files. The import file can now contain any kind of delimitation character such as a semicolon ( ; ) or pipe ( | ).
- You can now start and stop the service from the configuration window

# Before You Begin

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This guide provides instructions on installing and using the ICT Data Sync Service. It also includes information on the required prerequisites.

Please take a moment to read the material in this section before installation.

## Prerequisites

- An operational ProtegeGX system with software version 4.2.214 or higher
- An installation of the ICT Data Sync Service version 2.0.0.0 or higher
- A Data Sync license applied to the relevant SSN
- A SOAP Interface license applied to the relevant SSN
- ProtegeGX SOAP Integration Service Version 1.5.0.19 or higher

If you are using version 1.5.0.17, there is a restriction on the types of records that can be imported

For information on how to install and configure the ProtegeGX SOAP Service, refer to the [ProtegeGX SOAP Service Installation Guide](#)

- A ProtegeGX Client Connection available for use by the service

# Upgrading the Data Sync Service

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## Stopping the ProtegeGX Data Sync Service

Before upgrading, you need to stop the service.

1. Press the Windows+R keys to open the **Run** dialog
2. Type **services.msc** into the search bar and press **Enter**
3. Locate and right click on the **ProtegeGX Data Sync Service** to open the Properties for the service
4. Set the **Startup Type** to **Manual**
5. Set the **Service Status** to **Stop**
6. Click **Apply**
7. Click **OK**

This prevents any communication issues that could potentially cause unusual operation with the ICT Data Sync Service.

## Installing the ICT Data Sync Service

1. Run the supplied ICTDataSyncService.msi file to launch the install wizard. Click **Next** to continue
2. Select whether it is installed for Everyone who uses the PC, or just your user and click **Next** to install to the default location (C:\Program Files (x86)\Integrated Control Technology\Data Sync Service).  
If you are required to install the service in a different location, click **Browse** and navigate to the required file path
3. Click **Next** to begin installation
4. Once the installation is complete, click **Close**

## Using the Data Sync Upgrade Tool

The upgrade tool enables you to import your ProtegeGX Data Sync Service configuration into the ICT Data Sync Service. This enables you to retain the configuration required to get the system up and running.

1. To run the Upgrade Tool, double click on the ICT Data Sync Service Shortcut on the desktop  
Alternatively, navigate to the install location (if you accepted the defaults during installation, this will be C:\Program Files (x86)\Integrated Control Technology\Data Sync Service) and open the DataSyncServiceConfig.exe file
2. When opening the application for the first time, you will be presented with the following message:  
If you were previously using the ProtegeGX Data Sync Service (version 1.X.X) and wish to import the previous settings into the ICT Data Sync Service, click YES. Alternatively, if you wish to use the ICT Data Sync Service from new, click NO.
3. Click **YES**
4. Click **Next** to begin the upgrade
5. In the **Import Details** section:
  - **Settings File:** The file directory that contains the ProtegeGX Data Sync Service Settings.xml file. If you accepted the defaults upon installation, this file will be in C:\ProgramData\Integrated Control Technology\ProtegeGXDataIntegrationService
  - **File Format:** The type of import that was carried out using the ProtegeGX Data Sync Service

- **Row Delimiter:** The character that separates rows in the import file. For more information on the row delimiter in your import file, click on the help icon beside this field
6. Click **Next**  
You cannot proceed until all three fields are filled out correctly
  7. In the **Connection** section, you'll be prompted to enter your new Data Sync details. Completing these fields now means that you won't need to add the details into the configuration tool later
    - **Server Address:** The address of the target system. For ProtegeGX, this is the SOAP Server Address
    - **Data Server Address:** If the Data Sync is installed on a different machine to the SOAP Service, this field must contain the address of the Data Server machine (IP Address:PortNumber)
    - **ProtegeGX Operator:** The username required to access the target system
    - **ProtegeGX Password:** The password associated with the Username in the above field
  8. Click **Next**
  9. Once the process is complete, your previous configuration will be imported into Data Sync
  10. Click **Finish** to open the configuration tool with your previous configuration imported into Data Sync

There are some options that exist in in the ICT Data Sync Service that didn't exist in the ProtegeGX Data Sync Service. These options are all disabled by default. If you wish to use any of the new options, you must enable them manually.

## Uninstalling the ProtegeGX Data Sync Service

It is recommended that you uninstall the ProtegeGX Data Service only after the ICT Data Sync Service is operating correctly.



# Reference Tables

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If you have upgraded from ProtegeGX Data Sync to the ICT Data Sync Service, you'll find that some field names have been changed. The following topics outline the changes made.

## Field Mapping Reference Table

The Target Fields in Data Sync have slightly different names to those displayed in ProtegeGX. The table below outlines some of the commonly used field in ProtegeGX and the fields they correspond to in Data Sync.

ProtegeGX Field Name	ICT Data Sync Service Field Name	Note
PIN	PINNumber	This field can be found in the Card Numbers section of the General tab.
DeleteUser	DeleteRecord	The DeleteUser field is referred to as DeleteRecord and can be found in the Target Fields window. Note that this field may require a Conversion (Advanced Data Configuration) if the value in the import file is not of the correct format. Only fields that refer to true need to be added.
Disable User	DisableUser	The Disable User field (Users   Users   Options) is referred to as DisableRecord and can be found in the Target Fields window. Note that this field may require a Conversion (Advanced Data Configuration) if the value in the import file is not of the correct format.
Skip	Do Not Import	If there is a field in the import file that you do not wish to import, leave the Source Column blank. The Do Not Import option is used when a Target Field has been added previously and needs to be deleted.

## Options Reference Table

The options in the ICT Data Sync Service have slightly different names to those displayed in the ProtegeGX Data Sync Service. The table below outlines which options from the ProtegeGX Data Sync Service correspond to the option in the ICT Data Sync Service.

ProtegeGX Field Name	ICT Data Sync Service Field Name	Note
Delete Import File When Completed	Delete Import File When Completed	This option deletes the import file upon successful import. If some records have not been synced correctly, the file is not deleted.

ProtegeGX Field Name	ICT Data Sync Service Field Name	Note
Validate Import File	Check Import File Contains	<p>The Validate Import File option in the ProtegeGX Data Sync Service was used for file validation by searching for the &lt;SOF&gt; and &lt;EOF&gt; fields in an import file. If these weren't imported, the file was not imported.</p> <p>In the ICT Data Sync Service, the same functionality is built into the Check Import File Contains option but with added functionality.</p> <p>To implement this, enable the <b>Check Import File Contains</b> option and enter &lt;SOF&gt;.*&lt;EOF&gt; into the textbox.</p> <p>This field can also be used with any text or regular expression to validate the import file.</p>
Import Expired Users	Import Expired Records	<p>To use either of the Import Expired Users or Delete Expired Users options, you must configure a Start and/or End date for the user. You must also enable the Use This Field for Expiry Date Check option.</p> <p>If you are importing both a Start and an End date, the Use This Field for Expiry Date Check should be enabled for the ExpiryDate.</p> <p>This tells the ICT Data Sync Service to use the selected field to check if the date is in the past and perform the selected task (import or delete).</p>
Delete Expired Users	Delete Expired Records	
Ignore First Row in Import File	Start Import	<p>The Ignore First Row in Import File option in the ProtegeGX Data Sync Service was used to skip a header row in the import file.</p> <p>The equivalent of Ignore First Row in Import File is to set Start Import At Row 2.</p> <p>In the ICT Data Sync Service, the same functionality is built into the Start Import option but with added functionality.</p> <p>Additionally, there are many ways to specify where the import is to begin. Refer to the ICT Data Sync Service Integration Guide for more information.</p>

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Integrated Control Technology welcomes all feedback.

Please visit our website (<http://www.ict.co>) or use the contact information below.

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