CASE MANAGER 5.2 - INSTANCE DIRECTORY

USER MANUAL

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SECTION 1   OVERVIEW AND PURPOSE

This user guide will provide the user with an understanding of how the Instance Directory Utility functions and provide the necessary knowledge to operate this utility.

SECTION 2   DEFINITIONS

Instance
An instance is a representation of the database, thus, the instance contains the name of the database and its location (where the database is currently stored).

Instance Directory
The Instance Directory is a network-wide database directory that keeps track of all instances related to the Instance Directory. Anyone can access an Instance Directory over the network.

Multiple Instance Directory
A Multiple Instance Directory occurs when one network has more than one Instance Directory on to which people can connect. This, however, is not advised and the Case Manager team recommends that only one Instance Directory be implemented on a site.

SECTION 3   INSTALLATION GUIDE

Step 1: Instance Directory Utility installation files

To install the Instance Directory Utility, you will first need to get the Case Manager application files from your service provider or storage location.

Run the file as "Administrator" to allow the application to install properly. When this file starts running, the application will automatically be installed and create an icon of the application on your desktop. This application functions without the installation of an Instance Directory service.

SECTION 4   INSTANCE DIRECTORY OVERVIEW

The Instance Directory is a window service which runs on your computer under the service tab in Task Manager. The Instance Directory stores all information about the available instances. This information includes the database version, database name and database location.

The Instance Directory connects Case Manager with the database as it handles all connections to the database.

SECTION 5   FEATURES AND FUNCTIONS

When you run the Instance Directory Utility a start-up screen with a list of available Instance Directories is displayed. You can enter the application without selecting an Instance Directory or you can configure a selected Instance Directory.

When entering the application without an Instance Directory selected, a number of functions won't be available for use. The only functions that will be available are: **Restore**, **Backup**, **Verify User**

and **Upgrade** the database. However, when using these functions the user will have to specify their own database location and database name.

Restore Database Function

The **Restore Database** function allows you to restore a current database with past backups that were created. A restore log can also be created if the user provides a file path to save the log file containing information about the database restore process. (Login is required to be able to access this function)

Backup Database Function

The **Backup Database** function allows you to back up a currently selected database instance as well as create a log file which will keep information about the data backup if a log file path is specified. Database backups can now be done with garbage collection on or off. (Login is not required to be able to access this function)

Garbage collection removes old recorded versions that aren't needed anymore. This works like a sweep and can be done manually or automatically by turning garbage collection on or off during the backup process. It can, however, increase the time it takes for the backup to complete.

Both the Backup and Restore functionality remember past path locations. The last saved file path is the default location for backup files. This makes it easier to access and restore backups. Backup file names are generated by making use of the instance name specified and the date and time the backup occurred.

Verify Database User Function

The **Verify Database User** function verifies that the Case Manager users exist on the Firebird Database Server.

Upgrade Database Function

The **Upgrade Database** function allows you to upgrade databases to a particular version. It also displays the associated risks and additional functionality a user will receive when upgrading the system to the selected version. Upon agreeing to the upgrade the process will automatically start and complete the upgrade. (Login is required to be able to access this function)

There is also an option available to allow a user to view and print release notes of their current version and all version between the current and desired version.

Please note: When making use of the **Upgrade Database** functionality, please make a backup of the database prior to the upgrade. If the upgrade process fails the damage done is irreversible and will require the backup to be restored.

Visibility

Instance Directory allows you to turn there visibility on or of for a specific instance. This means that instances that aren't supposed to be shown in the instance directory will be hidden from user accessing Case Manager. The instance will still be visible in the Case Manager instance directory utility.

Instances Display

All new, old, visible and invisible instance are displayed in the main gird view of the instance directory utility below the tool bars. More information about the instance can be seen by double clicking an instance in the main gird will bring up a view displaying more information about the selected instance. Information displayed here are thing like the database location, name and server name. By using local host in name of instance you can cause the instance to want to connect to the local machine (on each of the workstations) and not the remote server.

The instance can be displayed in multiple ways with the instance utility this will allow you to setup the application to make it easier for you to work with and find the instance that you are looking for.

Non-instance database

This function allow you still to perform all upgrade backup and restore database function within the Case Manager instance directory utility. All the user has to do is provide a valid path location to the database. The specified database may not be registered as an instance on the Case Manager Instance Directory.

Multiple Instance Directories

Multiple Instance Directories can be set up on a single network, but should not be done since it can cause confusing and unpredictable behaviour in the applications. To ensure that the instance directory and the instance directory utility is function properly please install only one instance directory.

If two instance directory are installed this could cause lots of confusion for user using Case Manager thus on application start up user must remove all instance directory he doesn't want and only connect to the required instance directory to get the correct list of instance.

Security

The Case Manager instance directory utility has some built in security function to help with the protection of the client's instance information. When opening the utility a user can log in to have full control and access to all the functionality that the Case Manager instance directory utility has to offer.

Default password is "badpassword" the utility will ask you to change the password on first login attempted.

Instance directory doesn't support multiple user security meaning that the one password entered can be used by anyone to connect or gain access to the instances. Important to note all changes made in the instance directory utility will effect to whole site.

SECTION 6 USER GUIDE

Instance Toolbar

The Instance Toolbar provides functionality to add, edit, refresh, set visibility or delete instances (Figure 1):
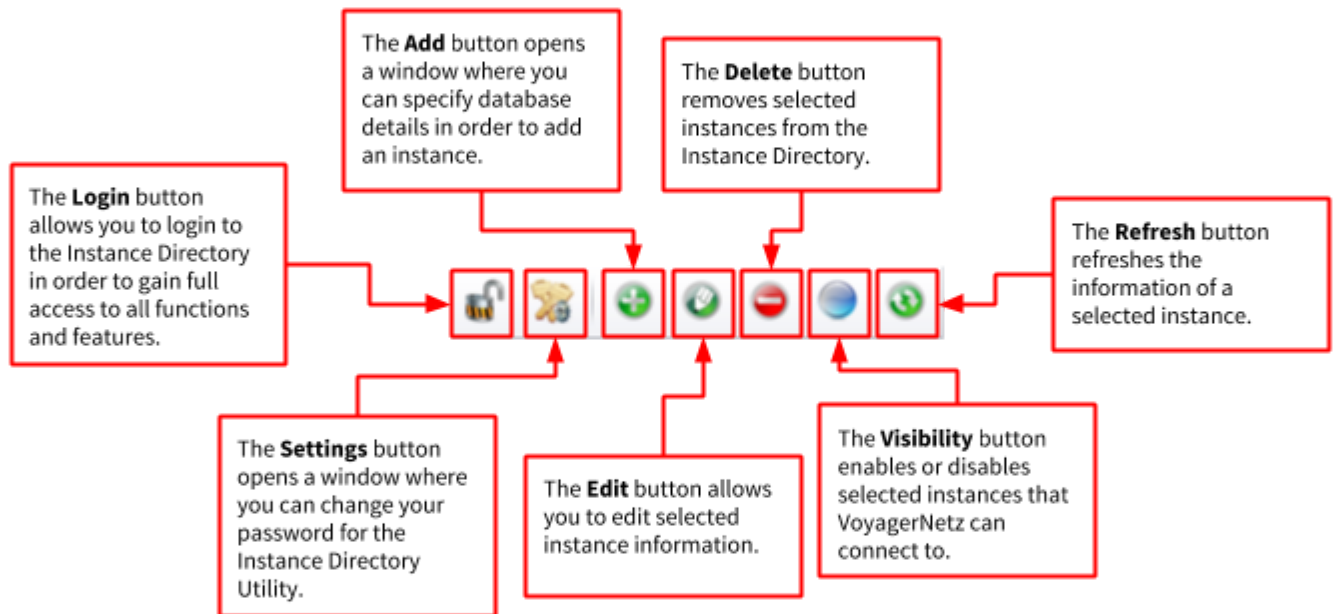

Figure 1: Instance Toolbar

Functionality Toolbar

The Functionality Toolbar allows users to restore, backup, verify and upgrade databases/instances (Figure 2):

The **Backup Instance** button opens the Database Backup window where you can specify where you want the backup to be.

The **Upgrade Instance** button opens the Version Upgrade window where you can upgrade instances to the correct version.

The **Restore Instance** button opens the Database Restore window where you can specify what backup you want to use to restore your database.

The **Verify Users** button adds all the necessary users so that Voyagernetz developers and support agents can access the database directly.
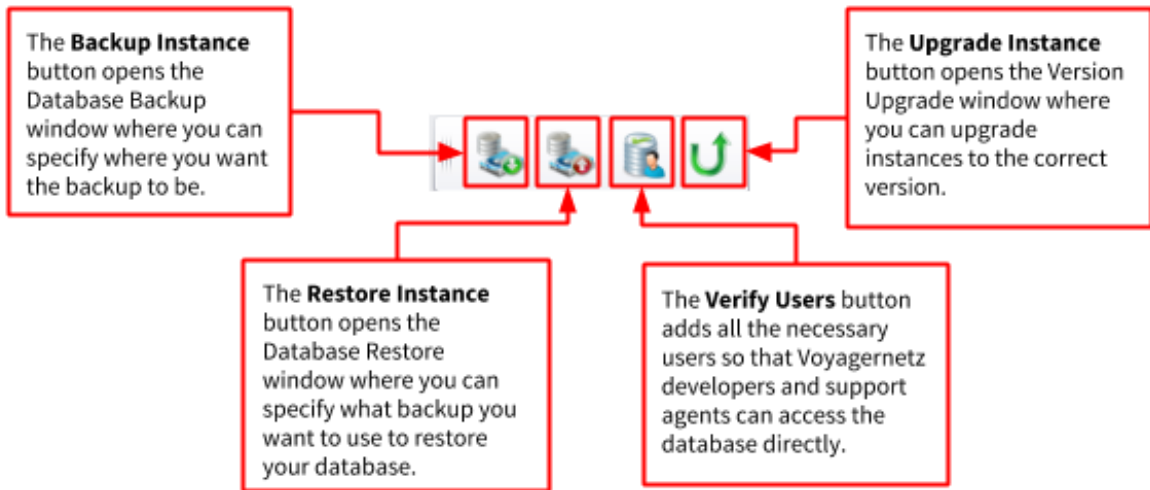
Figure 2: Functionality Toolbar

Case Manager Version Upgrade window

The Version Upgrade window allows users to upgrade instances/databases, as well as view or print the latest release notes or warnings (Figure 3):

The **Tools** button allows you to view past Release Notes and Warnings associated with any database version.

The **Warnings** tab displays all warnings or problems that may occur when upgrading to a new database version.

The **Release Notes** tab displays all changes that have been made and new features that have been added to the new version of the database.

The **Available VoyagerNetz Upgrades** window displays the list of available versions that the database can be upgraded to, along with all associated Warnings and Release Notes.