



Workshop #2: Manual Data Sync: Quick Guide to Syncing Data Manually

This guide provides essential techniques and practical steps to understand and perform data synchronization within hh2 systems. This includes syncing from various platforms, manual syncing processes, and handling common syncing challenges.

What are the Various Types of Syncs?

hh2 can connect to various platforms, allowing data to sync in different directions. Common sync paths include:

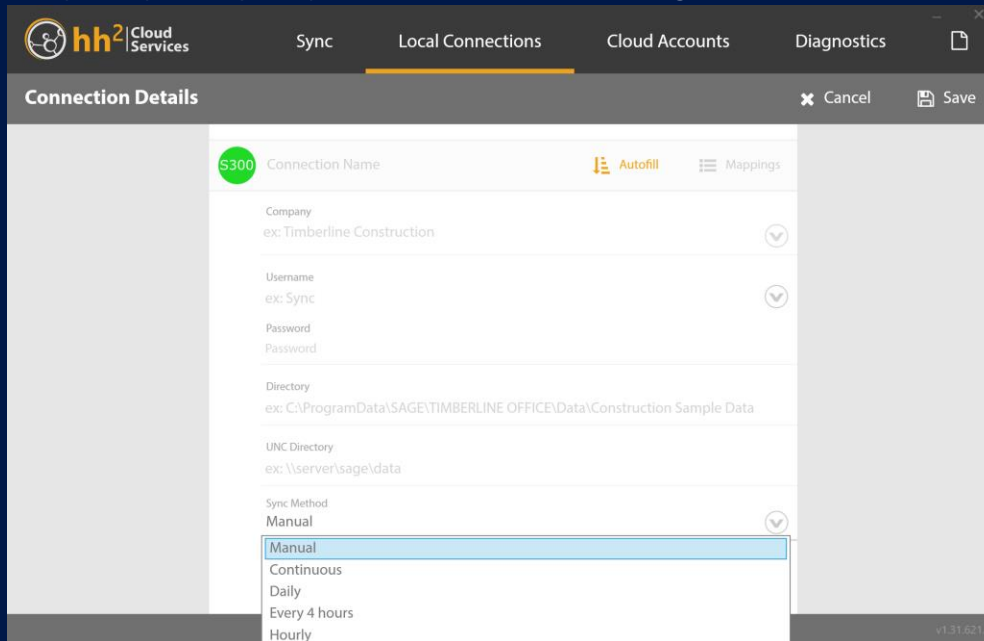
1. **Sync from Accounting System to hh2 Web:**
 - Transfers data from your accounting system to the hh2 web portal to be used as needed within your hh2 applications or connected platforms.
 2. **Sync from hh2 Web to hh2 Mobile App:**
 - Ensures data such as job cost codes, employees, jobs, etc. flows from the web portal to mobile applications for field users who are using the mobile applications to enter time, track expenses, field reports, or otherwise.
 3. **Sync from hh2 Web to Accounting System:**
 - Exports data back into your accounting system. This would typically be done during processes such as exporting payroll, invoices, etc.
 4. **Sync from hh2 Mobile App to hh2 Web:**
 - Syncs data entered within mobile apps back to the web portal. This can include time entries, receipts, daily logs, etc.
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Automatic Data Sync Frequency

Data automatically syncs from the accounting system into hh2 at regular intervals, typically at the top of every hour. To check and adjust the frequency:

1. Open the hh2 Synchronization Client on your accounting server.

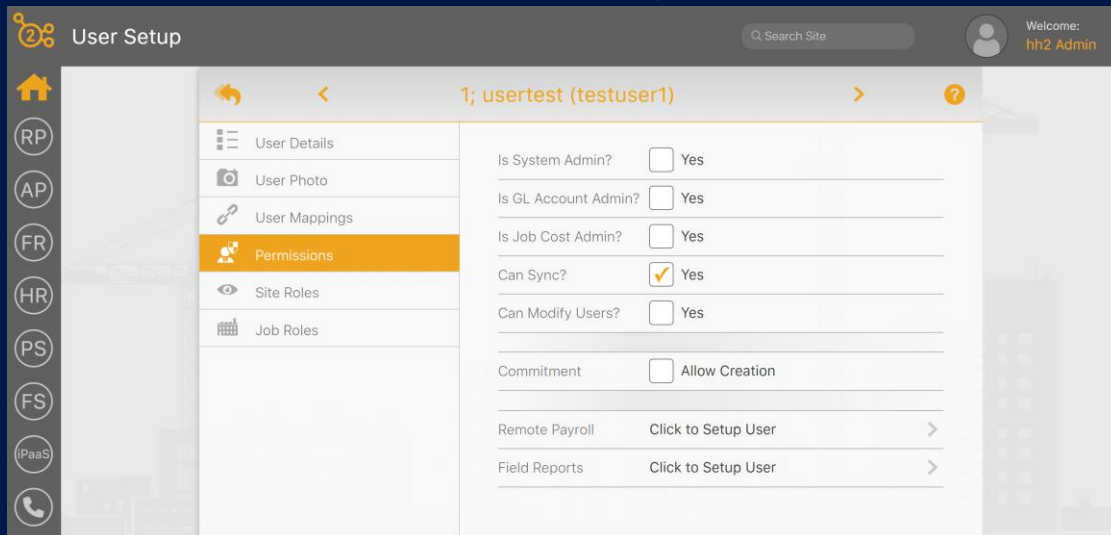
2. Verify the sync frequency in Local Connections settings shown here:



Permissions for Manual Syncs

Before any user can execute a manual sync to pull data from the accounting system into hh2, they must have proper permissions. To enable or verify these permissions for a user as an admin:

1. Go to the homepage.
2. Navigate to User Setup.
3. Select your user ID.
4. Under the Permissions tab, check the box for 'Can Sync?' as shown here:



Filtering Data for Syncing

When running a manual sync, you can filter the data:

- **Shallow Sync:** Processes data that hasn't been attempted to sync before or has recent updates.
- **Deep Sync:** Reprocesses all data ensuring no missing information without creating duplicates. This type of sync shouldn't be run unless under the direction of hh2 support or a trainer as it can kick off a large set of data that could delay your sync processes until complete. As such, deep syncs should not be a widely used sync format when manually syncing.
- **Filters:** Allows you to select specific data types or entities that you want to sync, and how far back in time you would like the sync to search. Be careful going back too far as this type of sync can take some time to process.

To run a manual sync with or without filtering data, please follow the instructions in this [support article](#).

Mobile App Syncing

Common issues with mobile app typically surround the fact that data is not appearing on the mobile app for selection due to it not being synced in. When this occurs, or if you have a user who is newly downloading the application onto their device, you will want to run a manual sync within the hh2 app you are working in. **Manual sync instructions for the mobile apps** can be found [here](#). It is critical that the user assures proper login credentials are plugged into the app before syncing and that they assure they are on the latest version of the mobile app.

If you have users with persistent app syncing issues, please **contact support:** support@hh2.com.